

Calgary Regional Partnership

**SPECIALIZED TRANSPORTATION SERVICE: SOLUTIONS
FOR THE CALGARY REGION**

PROPOSAL

NOVEMBER 8, 2004



TABLE OF CONTENTS

1.	EXECUTIVE SUMMARY	1
2.	RESPONSE TO REQUIREMENTS.....	2
2.1	Issues and Trends.....	3
2.2	The Challenge Of This Engagement Is Clear.....	5
2.2.1	A Hierarchy Of Coordination Approaches	6
2.2.2	Operations And Management.....	7
2.2.2.1	<i>Some Key Issues and Considerations</i>	<i>7</i>
2.2.3	Population And Ridership Estimates	8
2.2.4	Stakeholder Involvement.....	8
2.3	Approach & Workplan	8
2.3.1	Project Management & Project Control / Reporting & Client Interface	9
2.3.2	Risk Management	9
2.3.3	Task Descriptions	10
3.	CORPORATE PROFILE.....	19
4.	PROJECT TEAM.....	24
5.	SCHEDULE.....	26

Appendix A: Project Team Resumes

1. EXECUTIVE SUMMARY

Access to goods, services and activities is critical to the quality of life of all residents in the Calgary Region. This is particularly true of older adults and people with a disability who will continue to increase both proportionately and in absolute numbers over the next 20 years. Presently, there are a variety of transportation options available to the elderly and disability communities in the Calgary Region including municipally operated fixed route transit service (Calgary Transit), Dial-a-Bus (Airdrie) and a number of specialized transportation services (i.e., Airdrie's Special Needs Transit, Calgary's Access Calgary, Rocky View Regional Handibus, Towns of Canmore and High River FCSS, Cochran's Big Hill Senior Citizens Activity Society, etc.). Other transportation services designed for the elderly and disability communities include services for nutrition, rehabilitation, or adult day care programs. With a growing and more diverse elderly and disability population, the character and scale of specialized transportation will require a creative and comprehensive approach. It is imperative that solutions to address the sustainability of specialized transportation services be addressed.

Further, through the derived benefits of enhanced coordination and a sustainable specialized transportation service, ancillary benefits will be realized. Such benefits will include improved access to social and health services, enhanced economic benefits, and reduced green house gas emissions.

The *description of the project* is well articulated in your Request For Proposals. Little is gained by us paraphrasing your statements. Our methodological framework, however, provides insights of our own into the objectives of this engagement and translates these into a technical work plan designed to meet your needs and objectives.

Your stated *objectives* are clear. Our interpretation includes:

- Develop a market framework / deficiency identification;
- Identify opportunities to maximize the use of existing resources;
- Identify alternate models for governance (administration) for services and operations throughout the Region;
- Increase the efficiency in delivering services; and
- Improve access (and mobility) for customers.

In our view, this translates to both a strategic and operational planning endeavour. As such, the study is to review the delivery of community (specialized) transportation services and identify opportunities for alternate approaches to governance / administration specifically in order to maximize the efficiency and effectiveness of the services provided. Included will be the review and subsequent development of policies and procedures, management strategies, governance / administration and operative techniques to improve the customer service and cost-effectiveness of social/human service agency transportation services. In the development of alternate approaches or models, in the Region consideration will be given to:

- Level of service, user perspective and cost-effectiveness;
- Efficiency and effectiveness of operations and methods including alternate service delivery (and administrative) scenarios;
- Appropriate future service direction and policy initiatives;
- Ridership characteristics, demand estimates, user perceptions and attitudes;
- Supporting marketing and communications initiatives; and
- An appropriate course of action for the near-term period (2005 to 2010) and longer-term (to 2035), the implementation of the initiatives, identifying the financial implications and funding alternatives.

The aforementioned considerations will be addressed in our proposed approach and workplan. Key tasks include:

- (i) **Background Data Collection/Document Review:** Including the profiling of existing transportation resources.
- (ii) **Needs Assessment and Consultation:** Evaluating existing transportation resources in terms of meeting the needs of the Region's elderly and disability communities.
- (iii) **Consultation:** Including a series of agency interviews, focus group sessions and public open house.
- (iv) **Market Framework:** Profiling demographic characteristics of the Region's elderly and disability communities, translating number of people and program participants into travel demand forecasts.
- (v) **Best Practices:** Profiling creative and innovative solutions in community-based transportation, community collaboratives and coordinated transportation, from examples throughout North America.
- (vi) **Identification of Alternate Models:** Analysis and Evaluation: developing conceptual alternatives/alternate models and evaluating them within an evaluation framework addressing measures including effectiveness, economy and efficiency.
- (vii) **Recommendations and Implementation Plan:** Project outcomes will be documented in a final report including an Implementation / Action Plan. This will include a step-by-step implementation program including assignment of responsibility, identification of other affected agencies, critical path time lines for each activity, an activity cost estimate, and a specific description of what is required at each step.

We propose to complete this project by mid-June, 2005. This assumes a notice to proceed date on or about the first week in January 2005. IBI Group will commit the required resources to ensure that this project is completed on time and on budget.

2. RESPONSE TO REQUIREMENTS

We understand that the Calgary Regional Partnership (CRP) is looking for an innovative consultant to develop models for specialized transportation in the Calgary Region. The RFP's Terms of Reference clearly articulates the background and scope for this project. Little is gained by reiterating this material. The Terms of Reference coupled with both our familiarity with the Calgary Region and our review of the CRP's *2004-2006 Business Plan* will enable the IBI Group team to blend this understanding with our tremendous amount of demonstrable experience (in projects similar or identical to this one), to ensure "implementable" outcomes.

Access to goods, services and activities is critical to the quality of life of all residents in the Calgary Region. This is particularly true of older adults and people with a disability who will continue to increase both proportionately and in absolute numbers over the next 20 years. In addition, the population will continue to "age in place" requiring a different mix of services in the future. The Region's desire for the preparation of specialized transportation service *solutions* offers the interesting challenge of analyzing emerging patterns in the travel behaviour of the elderly and disability communities to help define transportation needs and

resource requirements in the Region. Specifically, to identify 5, 10, 15, 20, and 30 year major specialized transportation solution elements.

There are a variety of transportation options available to the elderly and disability communities in the Calgary Region including municipally operated fixed route transit service (Calgary Transit), Dial-a-Bus (Airdrie) and a number of specialized transportation services (i.e., Airdrie's Special Needs Transit, Calgary's Access Calgary, Rocky View Regional Handibus, Towns of Canmore and High River FCSS, Cochran's Big Hill Senior Citizens Activity Society, etc.). Other transportation services designed for the elderly and disability communities include services for nutrition, rehabilitation, or adult day care programs. With a growing and more diverse elderly and disability population, the character and scale of specialized transportation will require a creative and comprehensive approach. The IBI Group team will draw upon its understanding of the specialized needs of older adults and people with a disability and will develop planning strategies to meet the short and long term mobility needs of specialized transportation customers.

New directions in provincial policy on a variety of fronts show an increasing role and heightened expectations for public transit in general and the mobility of the elderly and disability communities specifically. Partners in the CRP face many challenges in fulfilling that role:

- Revenue and funding constraints including greater dependencies on subsidies;
- Escalating operating costs;
- Changing demographic and settlement patterns that make providing specialized transit difficult and potentially inefficient if not appropriately coordinated or consolidated;
- Rising expectations for transit's social mandate, e.g.,
 - Increase the accessibility of persons economically and transportation disadvantaged; and
- Satisfying the needs of the population centers within fiscal and fleet size constraints.

2.1 Issues and Trends

The senior population in the Province of Alberta aged 65 years and older will grow by close to 50 percent between 2000 and 2020. In the Calgary Region there will be an even greater percentage increase in the population aged 65 years and older between 2000 and 2020. The increase in seniors does not necessarily indicate a proportional need for the current mix of transit services. As the "baby boom" generation ages and the first major wave hits 65 in 2011, the senior population will generally:

- Be healthier and more physically fit;
- Be more ethnically diverse;
- Have a higher level of education;
- Have a higher disposable income;
- Be less transit dependent with greater automobile ownership/access;
- Be living independently; and
- Have a wider range of lifestyle preferences and higher mobility expectations.

To effectively plan for the long-term transportation (mobility) needs and services, there are several issues that need be considered in the development of a strategic approach and operational solutions in meeting the mobility needs of older adults and people with a disability. Our proposed Work Plan is designed to address these issues.

The Calgary Regional Partnership faces many new challenges in the preparation of a regional coordination plan for specialized transportation, including:

- Competition for local public transportation funds;
- Legislative constraints;
- A lack of transportation continuity and availability among the service agencies utilizing existing transportation providers; and
- A variety of funding sources often tied to specific program participants.

It is imperative that this initiative to develop and implement a transportation coordination model, tailored to the specific needs of the Calgary Region, be undertaken and managed effectively and efficiently in order to meet these challenges.

The further coordination of transportation services will enable the multitude of agencies and organizations to:

- Maximize the use of existing resources;
- Increase the efficiency in delivering services;
- Improve access to users; and
- Reduce or eliminate duplication and redundancy.

This translates to the need for a *regional coordination plan for specialized transportation*. It is important to recognize that the development of such solutions must be done with the knowledge of other initiatives including Calgary's *Go Plan* and the *Regional Transportation Plan*.

Transit, and more specifically, *mobility*, has played an important role in the daily living requirements of all residents of the Region. To date, for the most part, only those with access to a private auto (as driver or passenger), affiliated with a specific agency, organization or program, have been able to access transportation services with only limited services available in a public mode. We suspect that many of the more discretionary trip needs of these populations have not been met. Further, specific populations or market segments including the indigent, students/youth, older adults and persons with a disability, etc., may have fewer (public) transportation options available.

To effectively plan for the long-term transportation needs and services, there are several issues that need be considered in the development of a regional coordination study for specialized transportation. They are:

Transit system oversight. How can local jurisdictions maintain control over their own services while providing the necessary inter-county links to nearby communities? Is it efficient and effective for local jurisdictions to provide their own transit or specialized transit service? What is the role of each jurisdiction with regard to transit decision-making?

Transit system funding. Are there new funding sources that can be tapped? What are the short- and long-term capital expenses? How can the respective communities address real or perceived inequalities in required contributions to regional or local transit services?

How appropriate and expandable is the current mix of public, private, volunteer and agency transportation services to meet future needs? Is there the potential for community collaboratives for improving coordination of service and funding resources? What is the best strategy to maximize service coordination in the Region and *build on the successes* of existing operations?

How will plans for program expansion and the delivery of services affect the demand for transportation services? Would agencies and organizations consider adequate accessibility in their decision making? How can the CRP partners work with agencies to help them understand the transportation implications of their service delivery strategies?

How will private sector developments and services oriented toward the expanding senior market affect demand for senior transportation? Could senior oriented commercial or recreational developments be located centrally or along high frequency transit corridors? Could managed retirement communities be required to provide shuttle or feeder services for their residents?

What will the role of the automobile be? Does the automobile have a significant role in meeting future travel needs through expanded and organized volunteer mobility clubs or societies?

How will changes in the delivery of health care services affect travel demand? The trend toward out patient programs will certainly contribute to increased, but focused travel demand. Are there routing strategies that will reduce travel time and effectively use existing services?

How will changes in the delivery of land ambulance services (and non-emergency medical transportation) affect travel demand? Changes in governance in the delivery of land ambulance as well as fiscal responsibility may facilitate additional opportunities for specialized transportation services to participate in the delivery of non-emergency medical transportation. Further, within this context, opportunities may exist to partner with the health care community (including the Calgary Health Region) to address issues of transportation as a barrier to accessing medical services.

How will workforce participation and workplace changes affect the demand for specialized transportation services? Does transportation present a specific barrier to employment (including seeking and retaining employment)? Are there specific challenges for entry-level employees? Does hours of work, including shifts, present specific challenges in terms available transportation options? Are there issues relating to the requirement for inter vs. intra county/regional transportation services? Do employers have challenges in attracting and retaining employees? Will an increased part time workforce participation result in increased off-peak travel demand? Will changes in technology further promote home-based work opportunities?

How will changing life style preferences influence travel behaviour, modal choice and service expectations? It is likely that the ethnically diverse aging “baby boom” generation will bring a set of values, expectations and life style preferences that will be quite different than the current elderly population. Seniors will be healthier; more educated and generally have a higher disposable income. Will there be greater electronic access to goods and services? Will higher income levels justify higher user fees for those who can afford it?

2.2 The Challenge Of This Engagement Is Clear

The *description of the project* is well articulated in your Request For Proposals. Little is gained by us paraphrasing your statements. Our methodological framework, however, provides insights of our own into the objectives of this engagement and translates these into a technical work plan designed to meet your needs and objectives.

Your stated *objectives* are clear. Our interpretation includes:

- Develop a market framework / deficiency identification;
- Identify opportunities to maximize the use of existing resources;
- Identify alternate models for governance (administration) for services and operations throughout the Region;
- Increase the efficiency in delivering services; and

- Improve access (and mobility) for customers.

In our view, this translates to both a strategic and operational planning endeavour. As such, the study is to review the delivery of community (specialized) transportation services and identify opportunities for alternate approaches to governance/administration specifically in order to maximize the efficiency and effectiveness of the services provided. Included will be the review and subsequent development of policies and procedures, management strategies, governance / administration and operative techniques to improve the customer service and cost-effectiveness of social/human service agency transportation services. In the development of alternate approaches or models, in the Region consideration will be given to:

- Level of service, user perspective and cost-effectiveness;
- Efficiency and effectiveness of operations and methods including alternate service delivery (and administrative) scenarios;
- Appropriate future service direction and policy initiatives;
- Ridership characteristics, demand estimates, user perceptions and attitudes;
- Supporting marketing and communications initiatives; and
- An appropriate course of action for the near-term period (2005 to 2010) and longer-term (to 2035), the implementation of the initiatives, identifying the financial implications and funding alternatives.

Through the derived benefits of enhanced coordination and a sustainable specialized transportation service, ancillary benefits will be realized. Such benefits will include improved access to social and health services, enhanced economic benefits, and reduced green house gas emissions.

With few exceptions, the respective service providers typically exist in functional silos with the thrust of initiatives targeted towards the delivery of programs and services to client specific segments of the population. The service providers are more focused on individual elements of strategy than the overall business strategy of serving all of the transportation needs of their respective communities. This initiative of the CRP recognizes the limitations and inefficiencies of the current administrative and service delivery environment and recognizes the potential gains to be made with an integrated and coordinated approach.

2.2.1 A Hierarchy Of Coordination Approaches

Although integration can yield benefits, it, like any administrative and service delivery initiative, consumes resources to implement and operate. Program administrators will be the first to recognize that coordination offers nothing of practical value if the costs of achieving it are greater than the efficiencies and other benefits that arise. There is in fact a threshold demand above which an integrated and coordinated approach to service delivery will be less costly than separate delivery schemes; and importantly, there is a range of demand over which the costs of coordination could be either higher or lower than individual delivery schemes, depending on the kind of coordination (or collaborative) concepts put in place.

This last point is important because the range of demand over which the net benefit of coordination is "design-dependent" is thought to be quite large. In other words, there may be many counties or regional authorities for which the particular approach to coordination or integration they select will determine whether or not it achieves desirable results. In the conduct of similar undertakings of this

nature, we have found there to be a "hierarchy of coordination approaches" spanning management processes at the most elementary level; then increasing in complexity to cover the coordination of operating functions; and, finally, extending to the most intricate and sophisticated, namely the coordination of physical delivery systems. In other words, coordination can occur among the resources (inputs) used in the "production" of transportation services; or among the services actually delivered; or among both.

An administrator's approach to coordination (or integration) will increase in complexity and cost the further "down" the hierarchy she or he chooses to go. The benefits, on the other hand, are dependant upon fleet size and composition, population, composition of client group, residential density and other factors. What the CRP and its project partners need therefore is a way of "optimizing" their coordination strategy, namely a way to:

- Identify potential coordination approaches; and
- Package various approaches in a way that ensures the benefits will exceed the costs.

The development of a practical and useful "blueprint for coordination" that serve these two aims, serves as the fundamental objective of our approach to this engagement.

2.2.2 Operations And Management

2.2.2.1 Some Key Issues and Considerations

Several key issues and considerations will be an integral part of this study:

- The determination of an effective service delivery (and administrative) organizational framework for a recommended strategy and the corporate philosophy which will govern the development of same;
- Initiatives of the CRP and other stakeholders relating to the organizational / administrative framework for the delivery of transportation services in the Region;
- Province of Alberta policies regarding the delivery of specialized transportation services and the subsequent need to provide cost effective transportation services; and
- Recognition of the wide variety of mechanisms available to generate both capital and operating assistance, including possible participation from:
 - (i) Federal (including Green Municipal Fund);
 - (ii) Province of Alberta (various degrees of involvement);
 - (iii) Local/County government options including taxation/millage, farebox revenues, advertising, etc.;
 - (iv) Opportunities for integrating school bus and public transportation services (at various 'levels');
 - (v) Private sector participation - contract services, employer purchase of services; and
 - (vi) Social Service/Human Service agencies - purchase of transportation services on a client specific basis.

Further, there exists a multitude of operational considerations ranging from levels of service, travel needs and requirements (market framework), demand management strategies, internal procedures addressing the administration component, and a functional analysis of operations and service delivery. Performance measurement criteria will aid in the ongoing monitoring of service delivery

and administrative responsibilities with the view of maximizing productivity within the parameters of prescribed objectives.

Another issue is that of the various local agencies, that in the past would have contracted or been responsible for the delivery of their own client specific transportation services, who now appear to have a greater reliance on other subsidized services. This may be contributing to a switch in revenue sources that could have an adverse affect on total revenue. Relatively high costs per trip and un-met demand might be relieved with the further integration/coordination of multiple specialized services within the region, (i.e., Brokerage type arrangement).

Experiences with the brokerage concept have been highly successful. In fact, in the United States, several States have passed laws mandating some form of local coordination of transit services.

2.2.3 Population And Ridership Estimates

Development of policies related to "public" transportation in the region, require that the population be characterized in an appropriate manner (i.e. who would benefit from which policies?). This involves the definition of appropriate transportation-related (general public, student, indigent, disability and elderly) groups, and the quantifying of demographic and travel patterns for each of these groups. An integral part of this study work program is that of doing specific data runs (from census data) for the region in order to provide detailed ridership (and population) estimates for the service delivery options being developed.

Transportation 'needs' will be refined further to address specific trip purposes including medical, educational, employment and human service purposes. Needs and opportunities will be generated after identifying gaps in transportation demand and those trips which are being supplied.

2.2.4 Stakeholder Involvement

In terms of soliciting input throughout the study process, there is a need to do both research and public consultation to ensure that all stakeholders (the general public, older adults, disability and indigent communities, M.D.s, township, municipal, Tsuu T'ina Nation, provincial officials, decision/policy makers, politicians, etc.) understand what services are currently being provided: the ability to provide; constraints in doing so; and the direction it wants to take in the future. Not only is an understanding of the current operating environment essential, but also of equal importance is that of enabling stakeholders to aid in shaping the future direction of public transportation services.

As specialized transportation including social service agency transportation services evolve and greater demands are put on the current systems to meet growing needs, many crucial areas must be looked at and decisions for change communicated to "stakeholders" in a positive manner.

As the research and public consultations take place, issues will surface and require attention in the coordination plan. To this end, members of the Project Steering Committee will participate in ongoing dialogue with the consultants through the formal meeting process. Our local presence will also facilitate informal discussions taking place from time to time.

2.3 Approach & Workplan

The proposed workplan has been designed to reflect requirements identified in the RFP.

2.3.1 Project Management & Project Control / Reporting & Client Interface

The Project Management component of the study is ongoing throughout the six-month study period to ensure that the project is conducted in an efficient and timely fashion. The Project Manager is responsible for carefully monitoring the work in terms of deadlines and budget. The internal IBI Group project accounting systems and tools will aid in the advance identification of potential problems to facilitate corrective action. Our standard software tools include the tracking of individual labour against tasks and time.

IBI Group has implemented a Quality Management System (QMS) as part of ISO9001: 2000 standard, certification. QMS is a critical component of our project management and control processes.

This task includes the preparation and submission (with financial claims) of monthly status reports to the client. These reports will address fiscal performance, percentage of the work complete, schedule, etc. and include a completed Project Schedule and Cost Monitoring form.

At the initiation of the project, we will meet with the Project Steering Committee and discuss the proposed work plan together with establishment of goals, objectives and responsibilities. Due to the size, complexity and interactive nature of the project, agreement how the work will be performed is critical. This also allows an opportunity to refine schedules (if need be) before the commencement of the work.

In addition to structured meetings, there will be ongoing interface with CRP officials through informal meetings, telephone calls, and e-mail communication.

2.3.2 Risk Management

While our demonstrated experience will attest to our ability to successfully complete this project, it is worthy to note that our team is able to produce objective and “implementatable” plans. Key project team members bring direct “hands-on” program and service management and operations experience. Having been in the employ of public sector (transit) agencies (and having held senior administrative positions), our team understands what a public administrator needs in a plan and system evaluation and understands both political realities and sensitivities.

Our proposed work plan calls for a series of formal meetings with the Project Steering Committee to review issues, findings and recommendations. The series of review meetings would begin with the initial kick off meeting. Meetings are proposed with the completion of critical tasks to review the consultants’ proposed approach and/or findings, and to obtain sign off on key audit elements prior to writing the draft final report. The series of task-oriented meetings is strongly recommended to ensure that the consulting team remains on the right path and to avoid surprises in the draft final report. We will also be available for informal meetings at any time while on site.

2.3.3 Task Descriptions

The Tasks are described below:

TASK 1. PROJECT INITIATION

A kick off meeting will be held to: introduce project participants; get a first hand appreciation of local specialized transportation issues; clarify project objectives, priorities, deliverables and timelines; finalize data requirements; and plan the outreach process. This could include the identification of key stakeholders. To economize, the kick off meeting will be conducted during the first field trip. During this field trip we would collect operating data, become familiar with the service area, consult with the Project Steering Committee and other Forum Members, and a select number of other key stakeholders.

TASK 2: BACKGROUND DATA COLLECTION / DOCUMENT REVIEW: Develop Profile of The Transportation Needs of in the Calgary Region

Existing data and research on the transportation needs of the elderly and disability communities in the Calgary Region will be gathered from participating agencies including the Project Steering Committee and other Forum Members¹. From the available data and research the consulting team will develop a profile of transportation needs and travel behaviour including:

- Initial estimates of program and agency participation;
- Service mandates of programs and agencies including eligibility criteria for participation;
- Program start and finish times;
- Trip frequencies;
- Non-agency trip requirements of agency clients and the general elderly, disabled (and low income) populations;
- Modes of transportation used by the elderly and disability communities;
- The level of transit and specialized transit dependency relative to the role of the private automobile;
- Concentrations of trip origins and destinations;
- Anticipated changes in the scope and scale of programs and services;
- The direct provision of transportation services or user subsidies by programs and agencies; and
- Key mobility issues and transportation barriers for the elderly, disabled and low income in the Region.

Profile of Available Transportation Services

The consulting team will review and validate existing information to develop an initial inventory and profile of transportation providers. Available information will be updated and gaps filled through a brief telephone survey of local transportation service providers. In order to provide a good basis for service evaluation, the development of service improvements and the identification of workable coordination models, the profile of transportation service providers should be as complete and up to date as possible. Information gathered in the survey will include but not be limited to:

¹ Forum Members will be expected to provide data on their respective services, as outlined in this task description.

- Service eligibility and the number of registrants;
- Service mandate and sponsorship;
- Type of service provided;
- Number of trips accommodated (daily/annually);
- Service area and hours of operation;
- Demand growth trends and projections;
- Capital equipment and plan (fleet, facilities and scheduling/dispatch system);
- Operating costs (annual budgets, cost/trip, cost/hour, cost/mile);
- Funding sources;
- Fare structure;
- Level of productivity (passengers/hour, passengers/km);
- Periods of peak demand;
- Service policies and parameters;
- Booking, scheduling and dispatch procedures;
- Operating framework (in-house, contracted out, or combination);
- Terms of existing service contracts;
- Staffing levels and organization; and
- Labour agreements.

TASK 3: NEEDS ASSESSMENT / CONSULTATION

From data summarized in the previous tasks, the consulting team will evaluate the existing transportation services in the Calgary Region. In addition to any existing service overlaps, gaps, inefficiencies and barriers, service strengths will also be identified. Local service strengths will be recognized in the development of service improvements and in the development of practical coordination models for application in the Region. Service evaluation will include an assessment of:

- Service cost effectiveness;
- The appropriateness of service policies and parameters in meeting the travel needs of individual passengers and the transportation requirements of community agencies and programs;
- Service interface and coordination;
- Trip allocation strategies;
- Current demand satisfaction and the potential to accommodate future demand; and
- Service affordability.

This task will result in the identification of opportunities, deficiencies, and impending changes that may occur in the future and the proactive approaches that need to be undertaken. Our teams' experience in this area suggests that many of the identified needs or challenges may be more of a matter of perception than reality. This will be further probed together with the identification of their importance and urgency in view of the area's population, transportation needs and the services provided. Finally, the causes of service problems, challenges and/or barriers will be identified.

Critical to the success of the Needs Assessment is acquiring pertinent information from stakeholders including consumers and agency representatives.

We will develop a comprehensive outreach program consisting of three major elements. Each is discussed below.

1. Conduct agency interviews. We will conduct personal interviews with up to eight service agencies to learn about the factors that influence their clients' travel behaviour. These interviews will provide insight about how clients select their mode of transportation and will help validate what has been learned in previous tasks. Critical to this task is to make sure we select a cross-section of agencies to include a wide range of organizations geographically and culturally. We do not intend to conduct these interviews following a detailed survey questionnaire, but rather, we will develop interview guidelines that will allow agency personnel to respond more freely and will foster an open dialogue.

2. Conduct focus groups. We propose to conduct four focus group meetings as part of this subtask. The focus groups will represent a cross section of residents in the Region. The purpose of these focus groups is to explore factors that influence travel behaviour in depth with residents. Two focus group sessions will take place early in the study process as part of the data collection phase. Two focus group sessions will take place later in the process in order to share with the community, conceptual alternatives considered and preliminary recommendations.

3. Open House. We propose to hold one open house, inviting users-at-large and the public-at-large to inform the public and receive feed back on preferred strategies for sustainable specialized transportation services.

It is assumed that the CRP will be responsible for logistical support for the consultative sessions including invitations to participants, advertising and arranging for meeting facilities.

TASK 4: DEMOGRAPHIC CHARACTERISTICS AND FORECASTS / MARKET FRAMEWORK

For planning purposes, it is important to have the best possible forecasts of demand and an understanding of the composition of the market.

Using historical specialized transportation operating data, the IBI team will provide a statistical demand analysis along with a four-year forecast of demand and operating costs. IBI team members use state-of-the-art statistical procedures in achieving a high degree of accuracy in its forecasts.

In addition, the IBI Group team will build forecasts for different policy scenarios.

The objective of this task is to undertake a quantitative and qualitative analysis of the current travel demand and patterns of travel within the region. Forecasts of expected travel demand will use 2005 as a base year and provide projections for 2010, 2015, and 2020. Additional projections may be provided if requested.

Ultimately, however, the objective of this task must be to take these estimates and demand levels, and to use them as inputs into a planning process within a framework of opportunities for coordination. In other words, the data must be sufficiently specified, and the data bases themselves sufficiently flexible, so that, in concert with the Project Steering Committee, we can use the information to generate operational solutions and financial plans to meet the requirements of the community.

Our approach to this task is based upon this two-fold need -- the need for a sound and reliable database, and the need to use that database and the demand forecasts in an ongoing, dynamic operating environment. This requires a team with sound strategic, operational and analytical thinking that understands data collection and survey research, and the operating and financial parameters of transit operation. Both the work plan and the project team reflect this challenging requirement. We will consult Statistics Canada and work with the Project Steering Committee and other agencies to obtain information on population and population density; income; age; incidence of disability, and employment.

Our team has developed a number of unique demographic analysis tools designed to provide information on transit ridership potential, including demand within specific sub-regions and corridors. Density maps are very useful for designing productive fixed-routes and making crucial decisions about how to expend valuable operating resources. Illustrating demographic data is an effective tool for analyzing transit potential.

Complementary to the analysis of primary data is the application of the **Transportation Information Base of People with Disabilities**. This database was developed under contract to Transport Canada and uses both Statistics Canada census information coupled with data from the Health and Activities Limitation Survey (HALS), profiling incident rates of disability including physical, cognitive, sensory, etc. and accompanying functional limitations. The IBI Group team has applied data from this Information Base to several studies, which are similar to the proposed work, and is intimately aware of its tremendous worth and its limitations. With respect to the projection of transportation disability estimates into the future, a predictive model is part of the Information Base. Profiles of the following characteristics will be generated:

- **General disability groups** - mobility impaired, cognitively impaired, wheelchair users, etc. and incidence;
- **Transportation disability** - groups by functional disability classifications;
- **Socio-economic characteristics** - age, sex, income, employment and education;
- **Modes of transportation** - conventional fixed-route and specialized transit or specialized transit services; and
- **Travel patterns** - need, availability, usage, trouble, type of trouble, need for assistance, etc.

Projections will be developed using the above methods for a high and a low scenario to reflect the potential latent demand for transit services and other uncertainties.

Market Assessment and Demand Report: This sub-task would summarize the above analyses and prepare an interim report for review by the Project Steering Committee. The interim report will describe the following:

- Demographic characteristics and trends of the accessible transportation user population;
- Demand characteristics and future prospects for the market;
- Demand forecasts for the years 2010, 2015 and 2020; and
- Ability of existing and planned services to meet the demands.

The above will provide a comprehensive picture of the future transportation needs for the Calgary Region and anticipated shortfalls, providing the basis to develop strategies and alternatives to both address unmet needs and identify opportunities for enhanced coordination or collaboration.

TASK 5: IDENTIFICATION OF SERVICE GAPS

Based on the outcomes of previous tasks, we will analyze existing conditions, needs, and current and future demographic characteristics to determine the qualitative and quantitative service gaps.

After services are categorized, we will conduct a comparative analysis to assess how well the services are meeting existing needs. The analysis will compare the following variables for each service type:

- Public cost (the subsidy per passenger on a per trip and annual basis);
- User cost (how much is the out-of-pocket cost to the user?);
- Number of passengers served on a monthly and annual basis;
- Productivity (number of passengers carried on an hourly or daily basis);
- Service limitations (geographic boundaries, time limitations, agency trips only, etc);
- Qualitative measures (passenger perceptions on safety, convenience, reliability, etc); and
- Other advantages and disadvantages.

In some cases, data may not be available for comparative purposes. For example, the “true costs” of private automobile travel may not be appropriate for this analysis. Our approach will be to use relevant measures for each service type.

TASK 6: BEST PRACTICES

While *peer systems* are typically those with similar operating characteristics as those of the Calgary Region, we feel it is important to expand the definition of this task to include *best practices*. Despite size of community, it is important to profile creative and innovative approaches to transportation coordination in general and transportations services for older adults specifically. Project team members have developed and/or reviewed such best practices in communities with populations of less than 50,000 (in small urban and rural communities) to several million, and are very familiar with *best practices* including applications of collaborative efforts for community based transportation solutions.

The Peer Review will involve identifying, in concert with Project Steering Committee members, eight to ten communities or regions, some of which may have similar operating characteristics to that of the Calgary Region. In addition to common attributes such as population, trip densities, environment, maturity of transportation services, etc., it is also desirable to select properties that define a range of procedures and practices. In this task, other specialized (paratransit) and community transportation services in both the United States and Canada will be reviewed to provide comparisons in terms of ridership, performance levels and costs. A second important aspect of the Peer Review will be to determine what initiatives have been taken and the degrees of success in achieving improved service and cost efficiencies by changing the method of operation and/or introducing different types of service as well as alternate governance or administrative models.

We have undertaken a comprehensive Peer Review as part of recent engagements and have subsequently developed a database on current policies, practices, operating performance, infrastructure needs and practices, applications of pertinent technology, etc. for a select number of community transportation operations throughout North America. We will update this database and ensure that we have captured peer systems pertinent to operations in the Calgary Region.

We propose to design a survey instrument and send it to selected properties in advance of a telephone follow-up. The survey instrument will address primary areas of interest, including:

- Administrative/governance protocol;
- Engaging partnerships with the elderly and disability communities and/or agencies representing these communities;
- Measures adopted to encourage fixed-route or public dial-a-bus usage (as appropriate)

- Costs of various administration and service delivery scenarios;
- Social service agency clients, and the extent of cost-sharing arrangements; and
- Computer scheduling software/application of pertinent technologies.

The findings of the "Best Practices" review will be documented and reported to the Project Steering Committee.

TASK 7: ALTERNATE MODELS: ANALYSIS & EVALUATION: SHORT-TERM / IMMEDIATE ACTIONS (2005 – 2008)

This task will address both (a) opportunities for alternate approaches for governance and administrative functions; and (b) coordination opportunities.

An initial list of several plausible governance and organizational models (specifically for Calgary Region services) will be identified. The approach will be open-minded - all feasible ideas will be considered and little judgement will be passed. This task will include an interactive, "knowledge-circle" type of session with the Project Steering Committee.

Similarly, coordination opportunities will include:

- Operations/service delivery including service duplication analysis;
- Fare coordination;
- Scheduling coordination;
- Information dissemination, marketing and customer service coordination; and
- Other coordination opportunities.

While we will be cognisant of the environmental/corporate constraints in the identification of models for governance (and operations), we will not limit the possibilities to those that will not require changes to policy or goals. On the other hand, the models will be generated using fundamental principles based on the project-team and CRP/Forum member's experiences.

The identification of models will consider all facets of internal operating / administrative options, management options, as well as the broader service delivery possibilities (combined with initiatives from other providers in the Calgary Region).

Further, in the development of the possible models, IBI project team members will draw on its strong sense of what is happening in the delivery of specialized and community transportation throughout North America and the U.K. Included will be the identification of innovative techniques utilized by other properties that might be applied to the governance and operations/service delivery in the Region – for a solution tailored to the specific needs for the project partners in the Calgary Region.

The detailed plan for expansion of transportation services to accommodate identified needs will include but not be confined to identifying:

- Coordination, contract and brokerage opportunities;
- Assess and refine the functional requirements of service delivery;
- Revenue and cost estimates; and
- Alternate funding sources.

Paramount in the development and evaluation of alternate models is the identification and review of alternate service delivery (and administrative) scenarios. Alternative service delivery structures that maximize the effectiveness of service delivery within prescribed criteria will be developed. Such criteria may include: cost implications; labour relations; corporate philosophy; policy responsiveness, management control, ease of implementation, flexibility for change and impact on existing organizational structures.

Service delivery strategies within a coordinated transportation framework will be explored. These will include but not be confined to:

- Brokerage, consolidated or unified administrative frameworks;
- Public transportation solutions such as taxis, dial-a-bus, fixed-route/dynamically-scheduled transit, or multi-purpose vehicles;
- Alternate modes for the payment/purchase of contract services;
- Other private sector initiatives separate from those currently regulated by the Province and/or the respective municipalities, townships, etc.;
- User-side subsidies and variations;
- Specialized fixed route services (the "community bus" concept) or variations on theme;
- Charter services; and
- Agency/organization based transportation, including services provided to specific clientele, volunteers, school board services (pupil/public integration), etc.

The experience of the project team in the planning of community transport services in several other jurisdictions suggests that in order to maximize the mobility of this market segment, a cost effective *mix of services* (or a "*Family of Services*") may be appropriate. This concept will be explored to determine its appropriateness for the region.

We will also know what has not worked and try to understand why a particular strategy failed. This will also be critical in the development of a workable model. In addition, a clear understanding of an institutional, operational, policy or funding barriers to local service coordination is critical to the development of workable service coordination framework.

It is important to recognize that a *one-size-fits-all* scenario is not palatable. Governance and operational models will be evaluated in terms of what attributes of 'their' community may be applicable to the diverse operating environment in the region.

In order for a systematic analysis to be conducted, a consistent evaluation framework must be developed. Evaluation criteria would include, but not be limited to:

- Effectiveness in terms of the population served (including the student, indigent, elderly and disability communities together with the general public -- residents, tourists, etc.); and in terms of the number of trips generated (ridership, by trip purpose);
- Economy - the total cost of providing the service; Consideration of such factors as: capital vs. operating costs, large capital outlays, and present-valued expenditures over the long-term;
- Efficiency - the cost per trip, per vehicle-hour, etc.; Costs to both user and to the funding partners.
- Level of service - reservation constraints, hours of service, frequency of service, trip purpose, etc.;
- Quality of Service - to the user; measured in terms: convenience, transfers, trip times, comfort, dignity, and flexibility (response time, advance booking requirement, etc.);
- Socio-economic factors - impact on employment and social well-being;
- Human rights implications - delivery of services for persons with disabilities, integration, etc.
- Organizational issues such as operational flexibility, control and accountability, human and labour relations, and ease of implementation;
- Technical risk - if new or modified equipment is required; Ability of 'the appropriate authorities' to support the equipment (e.g. scheduling systems, vehicles, etc.);
- Political risk - the potential for changes in direction of local or Provincial policies; and
- Financial risk - if large capital outlays are required.

Demand (ridership) for each model will be cited based on influences of many factors such as catchment area served, diversion to other transportation services or modes, the fares relative to the

alternatives, the eligibility criteria, the level of service, the ability of the model to satisfy demand, and the impact of policies of other agencies.

The analysis will present the models in a comparative manner, i.e., against each of the evaluation criteria. The analysis will not be extremely detailed; it will be performed only to the point for comparison, so that one strategic approach can be recommended (in a later task).

Develop Short-Term Actions (2005 – 2008)

In this task we will identify the steps and coincident schedules necessary for the plan to successfully *evolve*. This task will summarize the costs for the strategy selected in terms of annual budgets. The *Business Plan* will also suggest targets for the various steps and components, to ensure that progress (towards the implementation goal) can be measured.

External influences always play havoc with long-term plans. The implementation plan will account for uncertainty and risk as much as possible, delineating alternate paths if critical decisions are yet to be made.

With regard to the "steps" mentioned above, the specific sub-tasks will be as follows:

- Identify the specific steps in the plan corresponding to each of pre-identified component parts;
- Merge and sequence these steps in a logical order;
- Translate the steps into a series of resource requirements (e.g. human, buildings, vehicles, computers, financial, etc.);
- Review the overall budget and resource plans over the next several years, and compare them with the requirements for near term service delivery; and
- Mesh the steps in the plan with the resource constraints by appropriate phasing of the steps.

This part of the implementation plan will resemble a PERT or CPM diagram, and will be cognisant of the "indivisibilities" of the steps in the sequencing, realizing that service delivery cannot be interrupted during the implementation.

The criteria used to assess the appropriateness of alternate models incorporate three major evaluation criteria which are traditionally used in transportation planning: effectiveness (or demand), economy (or cost) and efficiency (or cost-benefit). These are described in more detail below.

Effectiveness is a measure of the market, or the demand for a service. It can be quantified, typically, in terms of the number of:

- The number of persons who could potentially benefit from the service;
- The number of trips provided;
- The number of kilometres served; or
- The number of passenger-kilometres served.

Economy: is the cost of a service. Costs are calculated for capital purchases (functional requirements: vehicles, stations, facilities, etc.) and operation of the system (including fuel, maintenance, wages, etc.) For the purposes of this analysis, total economic costs and annual budgetary outlays, will be presented. Each option considered has its unique cost characteristics. The cost of transportation is relatively demand-dependent; it depends largely on the number of persons who use it. This means that vehicle costs and efficiencies are much more important than fixed facilities.

Efficiency: is a measure of the cost-benefit, measured here by the cost per trip of the service, and possibly, cost per vehicle-mile. These are generally an operating cost, but can also be expressed in terms of total costs.

Intangibles: In addition to the criteria listed above, there are costs and benefits that cannot be quantified. These include such factors as physical comfort, dignity and independence. Service providers must also consider financial risk, safety and compatibility with their operating mandates.

Summary: The results of the evaluations for each option, using the above criteria, will be grouped in a tabular form. Thus, each option is presented in a simple, but comparable manner, facilitating evaluation.

The Action Plan (or Business Plan) will clearly articulate a recommended administrative and operational framework for the coordination of transportation services. Also included will be a menu of strategic growth strategies to guide the implementation. In order to gauge the effectiveness upon implementation we will develop an evaluation framework incorporating measures of effectiveness and efficiency. Paramount to the success of such a demonstration is the net impact on partnering agencies or organizations.

Included in this task will be the documentation of the myriad of funding sources used for transportation in the Region. Our experience in other areas reveals that public transportation services rely on a large number of funding programs to pay for transportation services and that many of these sources are not derived from “traditional” transportation programs. For example, transportation services are offered as a means of getting their clients to/from program sites. The result is that the funds used to pay for transportation are not necessarily obtained through traditional transportation channels.

From data obtained in agency surveys, we will prepare a matrix showing the following types of information for each identified fund source:

- Current description and limitations on use of funds;
- Annual allocations or one-time funding amounts;
- Life span of the funding source or program; and
- Anticipated future allocations.

In addition to information about these existing sources we will identify and analyze the potential for new resources. This could include opportunities through the Municipal Green Fund (targeting for reduced green house gas emissions).

TASK 8: PREPARE A FINANCIAL ANALYSIS

The scope of work for this task will consist of:

- Review, validation and/or adjustment of cost and revenue assumptions;
- Modifications (as necessary) to the cost and revenue models;
- Definition of an integrated financial simulation (cashflow) model; and
- Documentation and presentation of the results.

In parallel with the above, we will review program revenue forecasts prepared by the agencies (if available), including fares, local support, state funds, and federal funding. This task will include the following activities:

- Review revenue assumptions and historic data;
- Define “baseline” funding condition (available and committed funding);
- Determine projected shortfall (if any);
- Identify potential supplemental funding strategy and timing;
- Describe potential strategy for securing necessary supplemental funding; and
- Adjust (as necessary) existing revenue forecast.

Based on the results of the above, we will develop an integrated financial simulation (cashflow) model, allowing the Project Steering Committee to study the feasibility of alternative cost and revenue scenarios. The model and its operation will be documented in a memorandum to assist analysts with model use. This summary will include a description of model functionality, required input data, assumptions and other parameters, and availability outputs. The cashflow model will include the following components:

- O&M Expense Component;
- Capital Outlay Component;
- Operating Revenue Component; and
- Supplementary Funding Component (O&M and Capital).

We will prepare a draft report summarizing the methodology and assumptions used in preparing the financial analysis. The report will summarize the revenue, capital, and operating expenses projections.

TASK 9: PREPARE AN ORGANIZATIONAL ANALYSIS AND IMPLEMENTATION PLAN

We will work with the Project Steering Committee to outline an implementable action plan and select the preferred (recommended) strategy for addressing regional coordination for specialized transportation needs. The plan will define each type of service to be provided; the responsible entity or entities; any necessary supportive planning, policy or legislative actions required; coordination activities needed including any public/private partnership activities; and funding requirements.

The action plan will include a step-by-step implementation program including assignment of responsibility, identification of other affected agencies, critical path time lines for each activity, an activity cost estimate, and a specific description of what is required at each step.

TASK 10: DRAFT AND FINAL REPORTS

The draft and final reports will address all of the aforementioned tasks, highlighting:

- Background material and data reviewed;
- Stakeholder consultation;
- Alternatives considered;
- Evaluation of alternatives
- Financial analysis/estimated costs; and
- Recommendations / implementation plan.

Thirty copies of the final report will be provided as well as electronic (PDF and Word) versions.

IBI Group agrees that all that all the base materials, research results, computer models, drawings, data and documents developed or prepared in the performance of services will become the property of the Calgary Regional Partnership. Upon completion of the services, copies of all documents will be delivered to the CRP.

3. CORPORATE PROFILE

IBI Group brings specific qualifications for the preparation of *Specialized Transportation Solutions for the Calgary Region* including specialized transit operational reviews, audits, financial analysis, infrastructure planning and funding, strategic planning, project management, information technology, legislative advocacy support activities, and public outreach and stakeholder consultation. The following descriptions of our qualifications including select project experience that

will attest to our credentials. IBI Group has achieved international recognition from decades of successful projects on behalf of public, private and not-for-profit agencies.

The IBI Group is uniquely qualified for this work. Having been responsible for service reviews and evaluations including the preparation of business plans for specialized transit services throughout North America and in the U.K., we fully understand the goals and objectives of the Calgary Regional Partnership. Our local presence in Calgary coupled with our commitment of significant on-site presence will enable the expeditious preparation of the final report.

The IBI Group team brings the objectivity and impartiality necessary for successful outcomes in the conduct of *Specialized Transportation Service: Solutions for the Calgary Region*.

The principal contact in regard to this submission is Lee Sims, Director, IBI Group. He will function as the Principal-in-Charge of the assignment, to ensure overall corporate accountability. Mr. Sims may be contacted at:

IBI Group
230 Richmond Street West
5th Floor
Toronto, Ontario
M5V 1V6

Tel: (416) 596-1930
Fax: (416) 596-0644
e-mail: lsims@ibigroup.com

IBI Group
Kensington House, Suite 500
1167 Kensington Cres., N.W.
Calgary, Alberta
T2N 1X7

Tel: (403) 270-5600
Fax: (403) 270-5610

IBI Group is a multi-disciplinary engineering, architectural, and planning firm providing a full range of consulting and design services to the public and private sectors. The firm celebrates its 30th year in 2004, and IBI Group is continually growing, with over 800 staff members located in offices throughout North America and Europe including offices in both Calgary and Edmonton.

IBI Group is an energetic and forward thinking firm with highly motivated and creative individuals. Being diversified both functionally and geographically, IBI Group is able to bring different disciplines from various cultural backgrounds together to solve transportation problems. IBI Group is well established in North America and the opportunity to work with you on this project is of strategic importance to our firm.

Moreover, this project gives us an opportunity to work with community professionals and residents that have a genuine interest regarding the changes taking place. We are enthusiastic about listening to and working with other individuals, to be part of the community and allow others to learn from our experience. In the past, these types of situations have led IBI staff as well as our clients to grow both professionally and personally.

Our clients include large and small public transportation operations throughout the world. We provide a full range of public transportation consulting services including:

- **Strategic planning:** Investigation of market trends and needs, analysis of performance shortfalls and improvement options, rationalization of investment decisions and financial structures, investigation of corporate relationships and responsibilities, reviews of corporate goals and targets, development of master plans, implementation strategies, and associated corporate policies to guide decision-making in the planning of services, facilities and operations;
- **Service planning:** Ridership surveys, analysis of service performance and market penetration, development of service standards and warrants, evaluation of route structures and service

levels, planning of routes and schedules, public participation programs and expert testimony, estimates of ridership and revenues, forecasts of service requirements and costs, development of short range service policies, plans and budgets;

- **Operations planning:** Surveys and focus groups, analysis of the performance and productivity of vehicle and manpower resources, development of performance indicators and targets, evaluation of management and training practices, evaluation of information systems and performance monitoring procedures, forecasts of operating requirements and costs, development of short range operating policies, plans and budgets;
- **Physical planning/design:** Alternatives analysis of major public transportation modes, route and alignment studies, functional analysis of garage and passenger facilities, economic and environmental impact assessments, requirements analysis of information systems for services and operations, investigation of vehicle requirements and replacement strategies, preparation of design guidelines and standards, development of staging plans and capital cost estimates;
- **Fare planning:** Passenger classification and pass utilization surveys, user cost/user travel characteristics, analysis of pricing policies and fare equity, evaluation of fare system security and fare monitoring technologies, evaluation of fare structure/ media and pricing alternatives including concession fares, preparation of design guidelines for fare collection and security systems, development of revenue policies, and fare system staging plans and budgets;
- **Marketing:** Passenger attitude surveys and focus groups, analysis of target markets and marketing climate, review of public relations activities and marketing programs, evaluation of passenger complaints and information systems, determination of marketing and employee training requirements, development of marketing and employee training requirements, development of marketing policies, programs and budgets.

IBI Group is one of few firms with a *practice within its transportation group specific to disability and aging in general and accessible transport specifically*. This practice is headed by IBI Group Associate, Steve Wilks (who will be IBI Group's Project Manager for this study on *Specialized Transportation Service: Solutions for the Calgary Region*) who brings over twenty-six years of professional experience in the planning, operation and evaluation of public transit with a specific focus on community and paratransit services including community collaboratives, the management of accessible transport for the elderly and disability communities, SMART shuttles and other expertise in alternate transit service models.

The following provides a representative sample of **IBI Group** projects that Steve Wilks has had direct responsibility for:

- **City of Calgary, Assessment of Accessible Transportation Services:** Project Manager and principal investigator for this comprehensive operational and policy review of paratransit and accessible conventional transit services.
- **Alberta Transportation and Utilities' Transportation Demand Study for People with Disabilities.** Project Manager - Developed strategic options for service delivery together with providing the analytic support for policy and future program development. The analytic support included the interpretation and application of TDC Information Base data.
- **City of Red Deer, Transit/Special Transportation Study:** Project Manager responsible for the review of transit and specialized/paratransit (Citizens Action Bus) service needs and requirements and the development of service improvement options; a review of current transit and specialized transit policies and procedures; the development of an Action Plan to guide the implementation of transit and specialized transit service improvements over the 2004-08 period; and the development of a long-range plan to address growth in the City over the next 30 to 35 years.

- **City of Edmonton, DATS: Review of Alternate Business Models** Project Manager – Responsible for the evaluation and facilitation of a recommended business model for the delivery of DATS services.
- **City of Edmonton, Tri-Municipal Travel Demand Study.** On behalf of the Cities of Edmonton and St. Albert and Strathcona County, responsible for a comprehensive analysis of travel demand by persons with disabilities. This study included extensive consultation with the disability communities in each of the municipalities. Consultation also included agencies and organizations representing the elderly and disability communities as well as the Regional Health Authority.
- **City of Edmonton, Edmonton Transit, DATS Eligibility Review:** Responsible for the review of DATS eligibility including existing processes, alternate approaches, extensive stakeholder consultation and a recommended approach for an amended process.
- **Contra Costa Transportation Authority – Paratransit Improvement Study.** Evaluated the paratransit operations in the Contra Costa County including extensive survey research, current and future demand, literature search and alternate models for governance and service delivery.
- **Sound Transit, Paratransit Technology Plan** – Retained to prepare a *Paratransit Technology Plan* that developed projects to enhance paratransit technologies and data systems for the coordination of scheduling trips for the Puget Sound regional transit agencies including Everett Transit, Community transit, King County Metro, Pierce transit and Sound Transit. This recently completed project focused on improving customer service and ensuring reliable connections for customers making inter-county or multi-leg journeys with different services. Principal tasks include documentation of functional requirements, profiling existing technologies and operating practices, identification of opportunities and evaluation (including risk assessment), and preparation of scope and budgets for select number of implementation strategies.
- **Orange County Transportation Authority (OCTA) - ACCESS Service Plans:** Evaluated current and future demand for the paratransit services in Orange County and reviewed the performance of the present ACCESS services in terms of compliance to ADA (Americans with Disabilities Act) eligibility criteria, service criteria and OCTA performance standards.
- **Ann Arbor Transportation Authority (AATA), Michigan:** Retained to provide professional "in-house" Paratransit Co-ordinator services. Primary responsibilities included monitoring service performance, evaluating alternate service delivery scenarios, contract monitoring and fleet management, and the implementation of demand management strategies including revised eligibility and certification processes.
- **Jacksonville Transportation Authority (JTA), FL – Mobility Plan:** Sub-consultant responsible for elements including eligibility and certification for the JTA to assume responsibility for the CTC (Community Transportation Coordinator) in Duval County, FL.
- **Massachusetts Bay Transportation Authority (MBTA) - THE RIDE Service:** Evaluated the services and operations of the MBTA's THE RIDE program, including operational audit considerations, performance, ADA compliance; service area configurations, contract structure documents, and demand management strategies. An integral component of this engagement was the facilitation of a series of consumer focus group sessions.
- **Paratransit Eligibility and Demand Study - New York City Transit Authority.** Project Manager and designed comprehensive surveys administered to both 33,000 New Yorkers selected at random and 1,000 Access-A-Ride customers. The resulting data base and analysis on the incidence of disability and ridership generation will yield the most comprehensive data base of its kind in the United States.
- **Washtenaw County -- Community Collaborative (CTSM):** Responsible for the development of alternate administrative and service delivery scenarios for a community collaborative

involving the human service; health care/medical (HMO); business and academic communities together with the municipal public transit service provider.

- **London Transport (U.K.):** Evaluated the services and operations of the Dial-A-Ride, Taxicard and Community Transport services throughout the Greater London Area and developed practical solutions for enhanced co-ordination of services for older adults and the disability community.
- **Developing a Business Plan for Paratransit Operations.** Guest instructor - University Outreach/Statewide Transportation Program, **University of Wisconsin-Milwaukee:** Provide course material to paratransit managers from throughout the United States on demand estimation methodologies.
- **Community Transportation Action Program (CTAP)** - Community Needs and Resources / Business Plan Development for six communities throughout Ontario (both urban & rural applications), including the identification of opportunities for improvement through coordination / collaboration. Responsible for engaging community partners including human service, medical & business communities in order to address transportation/access issues and target for financial support.
- **Community Transportation Review of Transportation Services for Disabled and Frail Elderly Persons in Ontario** - Responsible for market framework - generation of detailed ridership and demand estimates.
- **City of Hamilton, Paratransit Scheduling and Dispatch Software procurement** – Project Manager responsible for the procurement on behalf of the transit agency. Principal tasks included the documentation of functional requirements and subsequent process for the procurement of scheduling, dispatch and data management software. This latter task included the preparation of technical specification documents, Request for Qualifications, subsequent authoring of a Request for Proposal document, vendor submission evaluations and negotiations and contract award. This engagement also includes overseeing installation, training and acceptance testing.
- **OC Transpo – Para Transpo Service:** As part of the OC Transpo Comprehensive Review, responsible for evaluating the services and operations of the OC Transpo's Para Transpo program, including operational audit considerations, performance, and demand management strategies. Subsequently retained to undertake a comprehensive travel demand analysis.

4. PROJECT TEAM

We are proposing a team of experts with experience specific to the needs of the CRP and your project partners including familiarity with the local operating environment, internationally recognized expertise in specialized transportation and an unparalleled blend of research, analysis and hands-on operating experience with several specialized (para) transportation operations. Having been in the employ of public sector (transit) agencies (and having held senior administrative positions), our team understands what a public administrator needs in a plan and system evaluation and understands both political realities and sensitivities.

While familiar with the operations of transit and specialized transportation in the Calgary Region, the IBI Group team brings the objectivity and impartiality necessary for successful outcomes in the developing solutions for the sustainability of regional specialized transportation.

IBI Group is fully capable of meeting all the requirements of this work scope. For this project we have assembled a team of four senior consultants with expertise in local specialized transportation planning, system evaluation and funding, and facilitation. All key staff members are available throughout the duration of this project and have adequate time available to meet project needs.

Brief biographical sketches of key team members are provided below. Detailed resumes are provided in Appendix A.

Lee Sims, Director of IBI Group's urban transportation planning and transit practice. Mr. Sims will be the Director-in-Charge of this project and will be responsible for overall project quality and schedule and budget adherence. He has thirty years of transportation experience, specializing in the fields of transportation and transit planning, operations, economics and financial analysis. He has managed a wide range of projects for public and private sector clients in Canada, the United States, and worldwide. His recent work includes assisting in the development of a patronage and revenue model for a bidder toward the privatization of public transit services in Melbourne, Australia, planning and financial assessment of a commuter rail service in Ottawa, and playing a key role in identifying alternatives for the Orange County Transportation Authority's Fixed Guideway Major Investment Study and the Detroit Woodward Corridor Transit Alternatives Study. Mr. Sims has directed or managed some twenty urban rapid transit projects in half a dozen countries, many of which have been successfully implemented. He has worked on public transit projects in Canada, the United States, United Kingdom, Turkey, Israel, Lebanon, Saudi Arabia, Malaysia, Argentina and Chile.

Steve Wilks, Associate, IBI Group will serve as Project Manager and be responsible for the day-to-day client liaison and will have primary responsibility for each of the major tasks in the proposed workplan. Steve brings over twenty-five years of professional experience in the planning and operation of public transit with a specific focus on community and specialized (para) transit services including the management of specialized transit for the elderly and disability communities, SMART shuttles and creative/innovative solutions for the transportation industry. Complementing the operating experience is demonstrable experience in service and program evaluations, strategic, operational, service and policy planning including quality planning facilitation through the successful conduct of consultative sessions in workshop and focus group settings. Steve has significant experience in the regulatory and legislative environments governing the delivery of transit services for the disability community including the design and audit of services together with having provided 'expert witness' testimony in pertinent litigation. Steve also has experience in the implementation of community collaboratives, including the engagement of community partners from diverse disciplines including social services, education, medical/health, and the business communities; effectively works with volunteer/community groups, not-for-profit agencies, all levels of government, the business sector and the general public. Steve has been instrumental in developing a *Demand*

Management Framework to address community and paratransit operational solutions, and has published same under a Project ACTION grant. Steve is an internationally recognized expert in the field of transportation for older adults and the disability community and has been engaged by private and public sector clients throughout North America and the United Kingdom

Matt Carpenter, understands the important role the Calgary Regional Partnership and other associations of local governments play in transit planning efforts. He spent several years working at the Southeast Michigan Council of Governments (SEMCOG) – a voluntary association of some 240 local governments in metropolitan Detroit, Michigan. While with SEMCOG, Matt worked on a variety of transit initiatives including service planning, corridor studies and stakeholder coordination. He also assisted with the administration of major transit investment studies and helped organize public involvement efforts. His broader experience with transportation planning efforts in urban areas extends to transit, roads, parking, freight and railroad projects. With the IBI Group Mr. Carpenter focuses on transit service planning and is currently working on transit initiatives in Saskatoon, Saskatchewan and Flint, Michigan. He is a graduate of the University of Michigan.

Philip Harding, an Affiliate in IBI Group's Calgary office, brings an economic background to transportation planning and analysis. Further, he brings expertise specific to market research, financial evaluation, economic analysis, and supply/demand forecasting. He has been actively involved in both the Red Deer and Saskatoon transit studies.

Dawson Catton, a Director of IBI Group, will provide advisory input specific to the transit services (Calgary Transit and Airdrie's Dial-a-Bus). He is a transportation engineer with over thirty years of experience in the planning and operation of transit and paratransit systems, and performance audits of markets, services and operating practices in municipal transit organizations. He has undertaken market research, determined the market for various types of transit services, developed service standards, planned transit/paratransit services and benchmarked operating practices for a large number of transit properties in Canada and the United States. He has advised municipalities on contracting-out transit operations and was recently retained by an industry task force in Canada to develop guidelines on the steps that municipalities could take to create more efficient and innovative operations through the public or private operation of transit and paratransit systems.

5. SCHEDULE

Figure 7.1 illustrates our proposed schedule. IBI Group will commit the required resources to ensure that this project is completed on time and on budget.

Figure 7.1: SCHEDULE

Task	Task Name	Month											
		1	2	3	4	5	6	7	8	9	10	11	12
	PROJECT MANAGEMENT	[Gantt bar spanning all 12 months]											
1	PROJECT INITIATION	[Gantt bar in Month 1]											
2	BACKGROUND DATA COLLECTION/DOCUMENT REVIEW	[Gantt bar from Month 1 to Month 2.5]											
	Profile Available Transportation Services	[Gantt bar from Month 1.5 to Month 3]											
3	NEEDS ASSESSMENT / CONSULTATION	[Gantt bar from Month 2 to Month 3.5]											
	Agency Interviews	[Gantt bar from Month 2 to Month 2.5]											
	Focus Group Sessions	[Gantt bar from Month 2.5 to Month 3]											
	Public Open House	[Gantt bar from Month 5 to Month 5.5]											
4	DEMOGRAPHIC CHARACTERISTICS & FORECASTS / MARKET FRAMEWORK	[Gantt bar from Month 2.5 to Month 4]											
5	IDENTIFICATION OF SERVICE GAPS	[Gantt bar from Month 3 to Month 4]											
6	BEST PRACTICES	[Gantt bar from Month 2 to Month 4.5]											
7	ALTERNATE MODELS: ANALYSIS & EVALUATION- Short Term / Intermediate Actions (2005 - 2008)	[Gantt bar from Month 3 to Month 5.5]											
8	FINANCIAL ANALYSIS	[Gantt bar from Month 4 to Month 5.5]											
9	ORGANIZATIONAL ANALYSIS & IMPLEMENTATION PLAN	[Gantt bar from Month 5 to Month 6.5]											
	DRAFT & FINAL REPORTS	[Gantt bar from Month 6 to Month 7]											
	Project Steering Committee Meetings	[Yellow octagons in Months 1, 2, 5, 6]											
	General Forum Meetings	[Green octagons in Months 1, 5]											
	Presentation to Calgary Regional Partnership	[Red octagon in Month 6]											