



The Corporation of the Town of Milton

Report To: Council

From: Tony D'Alessandro, Director, Transit Services

Date: February 6, 2023

Report No: COMS-002-23

Subject: Milton Transit Service Review and Master Plan Update

Recommendation: **THAT the Milton Transit Service Review and Master Plan Update - Project Scope as outlined in Schedule A be approved.**

EXECUTIVE SUMMARY

- Consulting services will be retained to undertake the Milton Transit Service Review and Master Plan Update (“Transit Master Plan”) in 2023.
- The Transit Master Plan will focus on the evaluation of short, medium and long term transit initiatives to support service improvements and sustainable service growth.
- To ensure the deliverables of the Transit Master Plan meet Council expectations, staff are requesting approval of the Project Scope (Schedule A).
- The Transit Master Plan will be guided by a Project Steering Committee.
- A comprehensive community and stakeholder engagement plan will be implemented throughout the process to support Transit Master Plan development.
- Staff anticipate that the study will take approximately nine (9) months to complete, with a milestone update provided to Council this summer.
- Final recommendations from the Transit Master Plan will be presented to Council for consideration in the first quarter of 2024.

REPORT

Background

The 2022-23 Council Staff Work Plan outlines a strategic vision for the Town’s future, facilitating economic opportunity for residents, educational opportunities for youth, and a community that leads in sustainability, diversity and inclusion. Service area reviews and master plans provide guidance for service improvements and growth in alignment with the corporate vision.

Completed every five (5) years, the Milton Transit Service Review and Master Plan Update (herein referred to as “Transit Master Plan”) focuses on the evaluation of short, medium and long term transit initiatives to support sustainable service advancement in a growing municipal setting. The 2023 Budget included a capital project (C550100) to retain qualified

Background

consultant support for undertaking the Transit Master Plan. Primary goals of the study include:

1. **Review of current transit services.** Evaluation of transit services currently provided (e.g. business objectives, system design, service levels, performance, deficiencies, etc.) to identify potential changes in service delivery methods and/or service levels, as well as recommendations for service adjustments to improve efficiency, effectiveness and ridership uptake.
2. **Transit master plan update.** Building on previous service plans, the Transit Master Plan will recommend short, medium and long term sustainable transit requirements in growth areas, including: Boyne, Derry Green, Britannia, Agerton/Trafalgar, Major Transit Station Area (MTSA) and Milton Education Village (MEV).

Discussion

As the town continues to grow in population and employment, the effective management of transportation demand will be a catalyst to attract sound community investment and achieve the corporate vision. The adoption, optimization and expansion of transit services remain supportive components to the town's transportation network.

The Transit Master Plan will identify current family of transit services (e.g. conventional, specialized, OnDemand, etc.) and their delivery approach, service standards/triggers, potential changes and recommend opportunities for service improvement. The study will also develop a fare policy strategy and a marketing/ communications plan to support the future development of transit services in growth areas. Staff anticipate that the study will take approximately nine (9) months to complete, with a milestone update provided to Council this summer. Final recommendations from the Transit Master Plan will be presented to Council for consideration in the first quarter of 2024. Upon endorsement, Council will consider implementation of priorities and recommendations through capital and operating budget processes, delivered through annual departmental and divisional work plans.

Scope of Work

To ensure the deliverables of the Transit Master Plan meet the expectations of Council, staff are requesting approval of the Project Scope (Schedule A).

Project Steering Committee

The Transit Master Plan will be guided by a Project Steering Committee consisting of staff across the corporation. The Project Steering Committee role will be to provide oversight, direction and approvals, trouble shooting and review of materials. Individual project teams may also be required to provide information and input specific to their areas.



Discussion

Community and Stakeholder Engagement

Community participation and involvement in the development of the Transit Master Plan is essential to the project's success to support final recommendations. Consultation will include focused discussions and/or engagement tactics with stakeholder groups as identified, including (but not limited to):

- Transit riders/non-riders
- Elected officials
- Strategic Management Team, Leadership Management Team
- Town departments with links to Transit
- Business community and associations
- Educational institutions, public libraries
- Town Advisory Committees of Council with an interest in public transit
- Government agencies

The community engagement approach will incorporate a variety of traditional and innovative techniques to elicit feedback from residents and key stakeholders throughout the study process.

Financial Impact

The Transit Master Plan will be undertaken using funding in the amount of \$221,151, which was approved through the 2023 Budget in capital project C550100 - Transit Study.

Following completion and Council approval of the Transit Master Plan, the implementation of priorities and recommendations will be brought forward for Council approval through the annual Capital and Operating Budget process.

Respectfully submitted,

Kristene Scott
Commissioner, Community Services

For questions, please contact: Tony D'Alessandro, MCIP, RPP Phone: Ext. 2548
Director, Transit Services

Attachments

Schedule A. Milton Transit Service Review and Master Plan Update – Project Scope



Approved by CAO
Andrew M. Siltala
Chief Administrative Officer

Recognition of Traditional Lands

The Town of Milton resides on the Treaty Lands and Territory of the Mississaugas of the Credit First Nation. We also recognize the traditional territory of the Huron-Wendat and Haudenosaunee people. The Town of Milton shares this land and the responsibility for the water, food and resources. We stand as allies with the First Nations as stewards of these lands.

Schedule A

Milton Transit Service Review and Master Plan Update - Project Scope

OPPORTUNITY

The Town of Milton is undertaking a comprehensive review of the Milton Transit family of services and update of the long term Transit Master Plan. Primary goals of the study include:

1. **Review of current transit services.** Evaluation of transit services currently provided (e.g. business objectives, system design, service levels, performance, deficiencies, etc.) to identify potential changes in service delivery methods and/or service levels, as well as recommendations for service adjustments to improve efficiency, effectiveness and ridership uptake.
2. **Transit master plan update.** Building on previous service plans, recommend short, medium and long term sustainable transit requirements in community growth areas, including: Boyne, Derry Green, Britannia Agerton/Trafalgar, Major Transit Station Area (MTSA) and Milton Education Village (MEV).

The primary goals of this study align with the following themes and directives:

A. Discovery

- Establish vision, objectives and guiding principles for Milton Transit in the local and regional context

B. Connectivity

- Optimize the transit network and identify key strategic service connections
- Enhance customer service and engagement

C. Recovery

- Recover and grow system-wide ridership; service loyalty
- Improve accessibility, utilization, productivity and financial cost recovery

D. Resiliency

- Assess and adapt service deliveries to promote continued safety, efficiency/effectiveness, innovation and financial soundness
- Identify and implement industry best practices
- Advance supportive technologies and infrastructure

E. Longevity

- Transition services to accommodate planned population, employment growth; customer diversification
- Embrace sustainability in all aspects of service delivery

MILTON TRANST OVERVIEW

Milton Transit provides conventional (fixed-route), specialized/paratransit (Milton access+) and alternative service delivery (ASD) applications (microtransit/on-demand, school extras, etc.). In 2009, Council approved the 2009-2013 Strategic Plan for Transit Services, which recommended that Milton Transit administer a contracted service delivery model, moving forward with a dedicated, third party service provider. Through a request for proposal (RFP) process, PWTransit - Diversified Transportation ("PWTransit") was awarded a six (6) year service contract to deliver transit services, including operations, maintenance, fuelling, servicing and storing all Town-owned transit vehicles (revenue and non-revenue). PWTransit was also required to retain/lease a transit garage facility and administer customer call centre and dispatch functions. Council approved multiple contract extensions with PWTransit (with modified terms) and more recently a three (3) year contract extension in 2022 to bridge considerations for, and development of, a new Town-owned transit garage facility. The current contract term with PWTransit is to June 30, 2026.

The conventional transit network has evolved over the last 12 years with a redesign of route structure to accommodate coverage and service level growth. Over time, the route system has changed from a one-way loop concept to a modified, bi-directional radial system centring at the Milton GO Station. Year-over-year population growth and associated traffic have impacted service reliability. It is intended that this Service Review and Master Plan Update will re-evaluate this framework and provide guidance and direction for optimizing grid-style routing patterns, while planning future services with a continued combination of conventional and alternative service deliveries.

In 2021, Council approved the Milton Transit Alternative Service Delivery Strategy, which incorporated the implementation of a microtransit solution entitled Milton Transit OnDemand. OnDemand service was formally launched in September 2021 in new residential development zones and low density industrial areas, rationalizing existing fixed routes in those areas. At present, OnDemand is delivered as a comingled service with Milton access+ services within the current service delivery contract, using a Town-administered, third-party application. It is anticipated that OnDemand will continue to be a key component in the delivery of future transit services in Milton.

The Town also provides specialized transit services (Milton access+) for persons with disabilities. This service has evolved over the last ten (10) years, progressing as a result of increased service demand and regulatory requirements from the Integrated Accessibility Standards Regulation (IASR, 191-11), Accessibility for Ontarians with Disabilities Act (AODA). Program eligibility has aligned with IASR requirements, which included expanded eligibility criteria effective January 1, 2017. A coordinated/joint application process with Oakville Transit and Burlington Transit has been established to maintain eligibility consistency amongst Halton municipalities. A formalized in-person assessment and appeals process have also been established.

TRANSIT OPERATIONS FACILITY AND ELECTRIFICATION

The initial service delivery contract included a requirement to secure a transit facility in Milton to store and maintain Town-owned fleet, provide customer service, administration, dispatching and operator facilities. PWTransit currently leases a facility located at 420 Morobel Drive, which has been retrofitted to accommodate transit service delivery functions. Despite site layout limitations (e.g. tight vehicle circulation/maneuverability, no drive through service lane, etc.), the service provider has managed to effectively deliver transit services throughout the contract term and associated extensions. However, limitations to growth remain. As a result, the Town has moved forward with the planning of a Town-owned transit operations facility.

The 2020 and 2022 Capital Budget approved land acquisition, design and construction of a Transit Operations Facility. The Town is currently finalizing land acquisition opportunities that satisfy program requirements recommended in the Transit Operations Facility Feasibility and Functional Design Study (2019). The Town was successful in acquiring funding through ICIP - Public Transit Stream to support project costs to deliver substantial completion by March 2027.

The Town is currently embarking on a Battery Electric Bus (BEB) Feasibility Study and Fleet Transition Plan to outline a roadmap for transit fleet electrification, including facility infrastructure and utility supports. The purpose of the BEB Feasibility Study is to articulate policies, plans and targets that will influence the timeline toward transit fleet electrification and provide guidance to inform the procurement of electric buses and associated charging infrastructure.

Transit Master Plan recommendations shall consider and reflect on implications from Transit Operations Facility and BEB Feasibility Study developments, including, but not limited to service-related and financial assumptions.

COVID-19 IMPACTS

The COVID-19 pandemic continues to present operational challenges to the transit industry, which has affected overall performance of Milton Transit services. Currently, ridership is at 75-80% of 2019 pre-pandemic levels mainly impacted by a reduction of GO Transit related trips. It is anticipated that ridership recovery to pre-pandemic levels will be incremental and prolonged due to shifted travel demands and other external factors (e.g. reinstatement of GO Train services/demand). There will also be a need to further understand how remote working policies will progress in the medium-to-long term and the subsequent movement patterns of goods and services.

Transit Master Plan recommendations shall consider and reflect on implications from the COVID-19 pandemic, and associated ridership recovery assumptions.

SCOPE OF WORK

There are five (5) areas of study to be undertaken:

- Vision, Mission, Strategic Objectives
- Service Review and Master Plan Update
- Administrative Support and Contracted Service Delivery Review
- Fare Policy and Payment Strategy
- Marketing, Communications and Customer Relations Plan

1. Vision, Mission and Strategic Objectives

- 1.1. Review and update the Milton Transit vision, mission and strategic objectives, aligning to the following policy documents, where applicable:
 - 2019-2023 Milton Transit Service Review and Master Plan Update (Town of Milton)
 - Transit Alternative Service Delivery Strategy (Town of Milton)
 - Milton Transit Fleet Electrification Feasibility Study (Town of Milton)
 - Official Plans (Town of Milton and Halton Region)
 - Development Charge Background Study (Town of Milton)
 - Transportation Master Plan (Town of Milton and Halton Region)
 - Connecting the GGH: A Transportation Plan for Greater Golden Horseshoe (Province of Ontario)
 - 2041 Regional Transportation Plan (Metrolinx)
 - Provincial Policy Statement (Province of Ontario)
 - Places To Grow (Province of Ontario)
- 1.2. Provide strategic recommendations that will facilitate the advancement of Milton Transit business goals and objectives.
- 1.3. Support Town goals to address Climate Emergency and environmental sustainability initiatives.

2. Service Review and Master Plan Update

- 2.1. Review current conventional, fixed-route network; identify deficiencies and recommend improvements to route design, service level, service coverage, service frequency/headways and service span/availability (hours of operation) using a methodology that includes, but is not limited to:
 - 2.1.1. Assessment of route-by-route performance including ridership, service utilization, cost effectiveness, efficiency and customer value. Review scheduling adherence and on-time performance metrics to understand service impacts from evolving traffic patterns, population growth and road construction projects.

- 2.1.2. Evaluation of opportunities to modify, supplement, realign and/or restructure routes, key transfer points/hubs. Recommendations shall consider approaches to transition/phase the current hub-and-spoke transit network to a grid, hybrid and/or alternative design that maximizes ridership potential, improves service reliability, service levels and coverage.
- 2.1.3. Identification of primary and secondary transit corridors, key transfer hubs, terminals and bus stops areas. Recommend relocation of bus stop infrastructure, where applicable.
- 2.1.4. Evaluation of supplementary secondary school special service and service trippers. Recommendations shall include short and long term options to support sustainable school transportation.
- 2.1.5. Assessment of existing and new trip generation opportunities, including service level and span improvements, on weekday (peak and non-peak periods), weekend and statutory holidays.
- 2.1.6. Identification of issues and/or opportunities associated with bus-to-bus and bus-to-train (GO Transit) connections/transfers. Evaluate advantages and disadvantages of service pulsing and timed-transfer approaches.
- 2.1.7. Review and update of service design standards to help facilitate service transitions/phasing (e.g. service level, frequency and headway adjustments).
- 2.1.8. Evaluation of fleet complement and recommendation for alternatives to achieve optimal capacity requirements. Review vehicle size availability in the marketplace (e.g. 12 metre, 9 metre, 8 metre, 7 metre, 6, metre, etc.). Explore and analyze benefits, costs, opportunities and risks (BCOR) of long term fleet diversification.
- 2.1.9. Evaluate the implications of alternative fuel propulsion systems, mainly BEBs and hydrogen fuel cell.
- 2.2. Review the current OnDemand alternative service delivery (ASD) concept; identify deficiencies and recommend design improvements using a methodology that includes, but is not limited to:
 - 2.2.1. Assessment of OnDemand ridership, utilization and revenue performance, financial effectiveness, efficiency and customer value.
 - 2.2.2. Review of standards/targets for OnDemand implementation, transition and integration with the conventional service. Using best practices,

recommend approach for phasing transitions from one service concept to another (when changes occur).

- 2.2.3. Evaluation of opportunities to modify, supplement, realign and/or restructure OnDemand service parameters, zones and transfer points (to/from conventional services).
 - 2.2.4. Review of best practices to update service policies and enforcement options specific to no-show and cancellation policies.
 - 2.2.5. Assessment of stop infrastructure for OnDemand applications, including but not limited to: boarding and alighting areas, virtual versus fixed stops, transfer locations, etc.
 - 2.2.6. Investigation of opportunities to deliver point-to-point OnDemand applications when conventional service is not available (e.g. late evenings, Sundays, statutory holidays). Recommend concepts for potential conversion of service delivery models from one mode to another.
 - 2.2.7. Evaluation of fleet complement, comingling service delivery concept (with specialized transit) and provide recommendations to achieve optimal capacity requirements in the short and long term.
 - 2.2.8. Assessment of the role of non-dedicated service options in the delivery of partial OnDemand services. Explore and analyze benefits, costs, opportunities and risks (BCOR).
- 2.3. Review and evaluate specialized (paratransit) service performance in terms of financial effectiveness, efficiency, customer value and operational procedures. Recommend improvements using a methodology that includes, but is not limited to:
- 2.3.1. Assessment of ridership, utilization and revenue performance, financial effectiveness, efficiency and customer value. Review service reliability based on evolving traffic patterns, population growth and road construction projects.
 - 2.3.2. Evaluation of opportunities to modify and/or update service policies based on best practices, to support the continued coordination of efficient service delivery, including but not limited to no-show and cancellation policies.
 - 2.3.3. Evaluation of fleet complement, comingling service delivery concept (with specialized transit) and recommend alternatives to achieve optimal capacity requirements in the short and long term.

- 2.4. Benchmark key performance indicators (KPIs), targets, service standards and financial performance with GTHA and other comparable/peer transit systems in Ontario.
- 2.5. Update the current Transit Master Plan (2019), as well as the Development Charges Background Study (2021) to identify service requirements for growth and unique service areas. This component will involve the development of strategies to achieve a “transit first” service delivery in new residential, mixed use and employment areas. Recommend updates using a methodology that includes, but is not limited to:
 - 2.5.1. Exploration of phased conventional, OnDemand and specialized service delivery options (introductory, transitional, and full build-out) for the following areas:
 - Boyne Survey Secondary Planning Area
 - Derry Green Corporate Business Park Secondary Planning Area
 - Britannia Secondary Planning Area
 - Agerton and Trafalgar Secondary Planning Areas
 - Major Transit Station Area - Mobility Hub
 - Milton Education Village Area
 - 401 Industrial Area
 - Non-urban Milton
 - Other areas defined during the study process (as required)

Establish triggers and/or warrants for determining phasing changes in service delivery and structure.
 - 2.5.2. Identification of primary and secondary transit corridors, key transfer hubs, terminals and bus stops areas. Recommend location of bus stop infrastructure, where applicable.
 - 2.5.3. Exploration of service delivery partnership opportunities with local and/or regional businesses to support employee transit needs.
 - 2.5.4. Investigation of interregional conventional and specialized connections with Mississauga, Brampton, Peel Region, Halton Hills, Oakville and Burlington. Identify partnership, coordination and integration opportunities with neighbouring municipalities and Metrolinx/GO Transit.

3. Administrative Support and Contracted Service Delivery Review

- 3.1 Conduct a business process review and assess administration/resource supports, contract and staff compliment required, relative to comparable/peer transit systems in Ontario for the following:

- Revenue processing, reconciliation and management
 - Internal/external marketing and communications support
 - Customer service
 - Advocacy/outreach
 - Data analytics/interpretations
 - Information technology supports
 - Service delivery contract administration and management
 - Fleet and asset management
 - Implementation and enforcement of operational policies/practices/procedures including operator/passenger safety and security
 - Service planning
 - Service design standards, snow clearing standards, etc.
 - Other pertinent areas
- 3.2 Recommend Transit Division staffing requirements, including function and delineation/justification of sections for the period of 2024 - 2034. Establish a timeline for staging any recommended changes to staffing requirements.
- 3.3 Review the current service delivery contract to evaluate opportunities and identify possible changes in functional responsibilities to achieve optimal value including:
- Customer service/call centre function
 - Trip reservationist function
 - Vehicle maintenance services
 - Technology support services
 - Other pertinent areas
- 3.4 Provide guidance using industry best practices for establishing performance-based contract administration and monitoring.
- 3.5 Assess potential change management aspects based on the future development of a Town-owned garage facility.

4. Fare Policy and Payment Strategy

- 4.1. Review current fare policy, structure and products. Recommend updates using a methodology that includes, but is not limited to:
- 4.1.1. Review of industry best practices to update the Milton Transit Fare Policy that supports business goals.
- 4.1.2. Evaluation of current fare structure and fare media products relative to GTHA transit systems and Regional Fare Integration objectives. Provide recommendation and projections for future fare adjustments

over a five-year period, and subsequent impact on ridership and passenger revenue.

- 4.1.3. Set up and update parameters for period pass pricing.
- 4.2. Conduct BCOR with peer review on the following fare program initiatives:
 - Transfer policy
 - U-Pass program
 - Halton Region SPLIT program
 - Employee Pass program
 - Loyalty program opportunities
 - Fare inclusivity, equitability
 - Fare capping
- 4.3. Assess current mobile fare payment program. Provide short and long term recommendations for program continuation, adjustment and evolution.
- 4.4. Evaluate current GFI fare collection equipment and associated revenue management process. Provide short and long term recommendations for program continuation and/or adjustment.
- 4.5. Review and evaluate the opportunity for implementing the PRESTO farecard program on the Milton Transit system (conventional, specialized, OnDemand, etc.). Outline strengths, weaknesses, opportunities and threats from current transit systems that have adopted PRESTO. Identify policies and procedures required, short and long term capital and operating costs, and lifecycle commitments.

5. Marketing, Communications and Customer Relations Plan

- 5.1. Review current marketing, communication and promotional efforts; identify any opportunities for improvement.
- 5.2. Outline the marketing and communication components required for implementing a “Family of Services” service delivery model. Produce a transitional strategy to communicate a “Family of Services” approach.
- 5.3. Review and analyze benefits, costs, opportunities and risks (BCOR) of currently used digital platforms/tools (web and mobile) in customer service provision and management, including, but not limited to:
 - Transit App - trip planning
 - Triplinx - trip planning, real time vehicle information
 - Google - trip planning
 - Transit Tracker - real time vehicle information

- Magnusmode - travel training
 - Milton Transit OnDemand - OnDemand trip reservations
 - Token Transit - mobile fare payment
 - Social media - Facebook, Twitter
 - Web - www.miltontransit.ca, www.milton.ca
- 5.4. Develop a Marketing and Communications Plan (MCP) for a five-year period that addresses current and potential transit audiences including, but not limited to:
- Local (urban and rural Milton) commuters
 - Regional (Halton Region, GTHA, other) commuters
 - GO Transit Train and Bus passengers
 - Youth (including secondary students)
 - Post-secondary students
 - Persons with disabilities
 - Seniors
 - Families
 - Newcomers to Canada and to Milton
 - Visitors
 - Persons with low-income
 - Other key stakeholders
- The MCP shall reference behavioural ridership characteristics (e.g. frequent-users, occasional-users, non-users, and potential-users). The consulting firm shall also identify the MCP implementation process, associated budget requirements and resource allocations, to encourage a measurable behaviour shift toward Milton Transit use (e.g. annual % increase of per capita ridership growth).
- 5.5. Develop an executable measurement tool to support long term program sustainability, determine program/campaign successes.
- 5.6. Identify outreach opportunities to build partnerships, public advocacy and community trust. The consulting firm shall include required resource commitments/staff required to fully execute recommended outreach initiatives.
- 5.7. Evaluate opportunities to de/rebrand OnDemand and Milton access+ services to support service equity and inclusion.

PROJECT DELIVERABLES

1. Development and implementation a public and stakeholder engagement plan; facilitation of public, stakeholder, Steering Committee and staff sessions.

2. For all recommended service changes and growth initiatives, the development of detailed annual operating budgets for a five-year period (2024-2029), incorporating forecasted changes in ridership, revenue and estimated Provincial Gas Tax revenues relative to ridership and population growth. Ridership projections shall be in the following formats:
 - PM peak-period ridership, by system and route/service typology
 - Annual ridership, by system and route/service typology
 - KPIs for service and financial performance, by system and route/service typology
3. A ten-year (2024-2034) annual capital budget forecast in an electronic and editable format. Include all capital operating impacts and asset replacement costs; analyze and report high level implications to development charges (DC) (e.g. residential/non-residential, growth vs. non-growth, post period capacity, flow-through, etc.); identify full life-cycle costing for each capital project, including, but not limited to: studies, project management, ongoing maintenance, mid-life refurbishment, reconstructions/rehabilitations, etc. The budget forecast shall also include transit fleet typology, sizes, requirements (conventional, specialized, ASDs, supplementary etc.) and electrification implications for the same time period.
4. A technical memo completed by July 2023 that incorporates preliminary recommendations for consideration in the 2024 Capital and Operating budget planning process.
5. A final report in an electronic format that summarizes all findings, outputs, deliverables, public and stakeholder engagement, and recommendations for all sections of the Scope of Work.
6. Presentation of Final Report to Council in the first quarter of 2024.