



STAFF REPORT ACTION REQUIRED

Wheel-Trans 10-Year Strategy – September 2016 Update

Date:	September 2016
To:	TTC Board
From:	Chief Executive Officer

Summary

This report provides a progress update on the TTC's Wheel-Trans 10-Year Strategy approved by the Board on February 25, 2016. It informs the Board about upcoming changes to Wheel-Trans eligibility to be compliant with legislated requirements and seeks Board approval to expand the mandate for Advisory Committee on Accessible Transit (ACAT), commence a Family of Services pilot in 2017, and a migration plan for existing customers.

Program Drivers

- Unprecedented demand growth
- Expanding AODA requirements
- 2012 Auditor General's report
- Investments to improve conventional system accessibility
- Financial sustainability
- The TTC's five year corporate plan

Eligibility criteria and associated processes for specialized transportation services are subject to legislated requirements in the AODA that come into effect on January 1, 2017. To be compliant, Wheel-Trans has defined three categories of eligibility, a new application for service, and new application and appeal processes. The changes are based on industry best practices, discussions with peer agencies in the region and across North America, and extensive public and stakeholder meetings with customers, advocacy agencies and municipal and provincial partners. The updated eligibility categories and criteria necessitate changes to ACAT's mandate to ensure the bodies' alignment. Alongside the changes, a migration plan for existing customers has been developed and is presented.

TTC has made substantial investments to improve the accessibility of its conventional transit services creating opportunities to transform the service delivery model for Wheel-Trans that benefits the customer and improves the long-term financial sustainability of the organization. With the Family of Services model, customer journeys are delivered through a combination (inter-modal) of Wheel-Trans and accessible conventional transit modes (bus, subway, streetcar or community bus services) for those customers who are able, utilizing advanced technologies to book and deliver the customer initiated inter-modal trips.

While full Family of Services roll-out will take 10 years, a Family of Services pilot is detailed in the report and recommended for 2017. The pilot allows the TTC to work with its customers to test, validate and refine assumptions to build a final service delivery model and supporting operating procedures that meet customer travel needs, provide additional accessible travel options and maintain a high-quality of service for customers while simultaneously ensuring financial sustainability.

Recommendations

It is recommended that the Board:

1. Note the eligibility categories as set out in the section entitled “Changes to Eligibility”, in this report.
2. Request staff to expand the ACAT membership to include persons with mental health and cognitive disabilities.
3. Request staff to commence a Family of Services pilot in 2017, including implementing the first of several improvements to customer policies, and report back outcomes in Q4 2017.
4. Approve the migration plan for existing customers as outlined in this report.

Implementation Points

Recommendation 1: Changes to eligibility for Wheel-Trans service are to be rolled out by or before the January 1, 2017, legislative deadline set out in the *Integrated Accessibility Standards Regulation (IASR) under the Accessibility for Ontarians with Disabilities Act (AODA)*. This work will involve:

- Finalizing new operational procedures
- Training and engagement of Wheel-Trans employees
- Production of supporting documents
- New contract procurements
- On-going public communication

Recommendation 2: In line with the IASR requirements, the TTC is recommending an update to the mandate of ACAT to increase the types of disabilities represented, as well as increase the maximum number of advocates to be more reflective of its customer base to ensure advisement and guidance that enables it to make decisions in the best interest of customers.

Recommendation 3: A Family of Services pilot will be gradually implemented in 2017. During this period, Wheel-Trans will book and serve self-selecting volunteer customers using a pre-selected set of accessible services (i.e. specific routes, stops and stations). The pilot includes:

- Recruitment and conventional service familiarization for customer volunteers
- Training of select Wheel-Trans employees
- Selection of key routes and locations and associated training of conventional system employees
- Review of community bus services
- Developing feedback channels

Recommendation 4: The migration plan for existing customers involves no immediate change to their point to point services. Over the next three years, existing customers with permanent eligibility will have their eligibility category changed according to their service requirements to conditional or unconditional. Customers will be supported through the development of travel assistance programs, as well as changing customer policies to enable greater freedom of travel and spontaneity.

Financial Impact

The February 2016 report forecast a \$30M Class 5¹ overall capital estimate for the Wheel-Trans 10-Year Strategy. Based on this, the TTC developed an initial business case to further define scope and refine estimates.

This resulted in a refined Class 4² overall estimate, evaluated to be \$47.6M over the next five years (2017 – 2021), which includes \$42.5M capital expenditure and \$5.1M operating expenditure as detailed in Table 1. Additional details to the business case are provided in Appendix B.

¹ Classification based on industry standard Association for the Advancement of Cost Engineering (AACE) guidelines as summarized in the Appendix B. Class 5 estimate defined as an ‘exploration’ (concept screening) estimate with an expected accuracy range low of -20% to -50% and a high of +30% to +100%

² Class 4 defined as an ‘exploration’ (study) estimate by the AACE, with an expected accuracy range low of -15% to -30% and a high of +20% to +50%

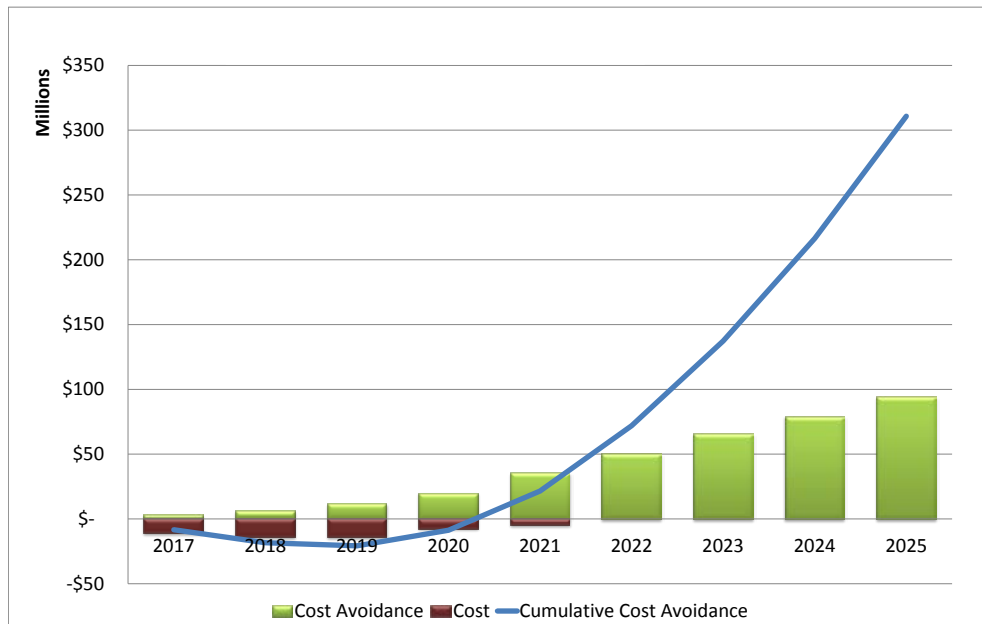
Table 1: Wheel-Trans Transformation Program Costs



Capital - \$42.5 M Operating - \$5.1 M
Total Program Funding- \$47.6 M

The investment results in over \$300M net cost-avoidance over the next 10 years as shown in Table 2. It is planned that specific expenditures related to procurements of new technology, infrastructure and external services will be subject to individual approvals.

Table 2: Cost Avoidance of 10-Year Strategy



The Wheel-Trans Transformation Program is included as part of the list of projects identified for Federal Public Transportation Infrastructure Fund (PTIF).

The Chief Financial & Administration Officer has reviewed this report and agrees with the financial impact information.

Decision History

This report is a progress update on the Wheel-Trans 10-Year Strategy presented in the February 2016 report and approved by the Board. The February 2016 report can be found here:

[https://www.ttc.ca/About the TTC/Commission reports and information/Commission meetings/2016/February 25/Reports/W-Trans 10 Year Strategy Update combined.pdf](https://www.ttc.ca/About%20the%20TTC/Commission%20reports%20and%20information/Commission%20meetings/2016/February%2025/Reports/W-Trans%2010%20Year%20Strategy%20Update%20combined.pdf)

Issue Background

The February 2016 report summarized the underlying drivers for the Wheel-Trans 10-Year Strategy, and specifically laid out obligations related to changing eligibility requirements under IASR and increasing customer demand for service, justifying implementation of Family of Services. Additional background information can be found in Appendices A and B.

The changes to transform Wheel-Trans will be implemented over the next five years (2017-2021). However, full benefits realization will not be achieved until broader accessibility investments at the TTC are completed. Namely, the low-floor light rail vehicles, which will replace the last remaining inaccessible surface vehicles, has an anticipated completion date of 2019, and the Easier Access Program, which will render all TTC subway stations accessible for 2025.

Accessibility/Equity Matters

The recommended changes driven by the Wheel-Trans 10-Year Strategy are inherently matters of accessibility. They ensure the long-term sustainability of the service to existing and future customers in the city of Toronto who rely on Wheel-Trans for transportation.

The Family of Services delivery model introduces equity into how services are offered to our customers. By integrating specialized service into the TTC's broader suite of accessible transit services, customers are provided the necessary service to overcome physical and environmental barriers they encounter. Some customers will continue to require door-to-door Wheel-Trans service; others can be accommodated most effectively using a combination of services and supports.

Comments

Changes to Eligibility (Recommendation 1)

The most pressing need within the Wheel-Trans 10-Year Strategy is to position the organization to meet the forthcoming legislative requirements. To do so, a series of changes to update internal processes, policies and supporting documentation have been developed.

The changes to eligibility are summarized as follows:

- Eligibility categories, re-defining Wheel-Trans eligibility as per the AODA criteria set out in the IASR legislation, including:
 - Conditional eligibility: a person with a disability where environmental or physical barriers limit their ability to consistently use conventional transportation services.
 - Unconditional eligibility: a person with a disability that prevents them from using conventional transportation services.
 - Temporary eligibility: a person with a temporary disability that prevents them from using conventional transportation services.
- Eligibility criteria, expanding it to any Ontario Human Rights Code-recognized disability that prevent a person from using conventional transit, including physical, cognitive, sensory and/or mental health disabilities.
- Application for new Wheel-Trans services, including a new application form, customer application process, tools to assess customers' abilities to use conventional transit, and an eligibility appeal process.

Details of the above identified changes are provided in Appendix C.

In order to properly prepare to serve this new customer base, Wheel-Trans staff will receive training specifically in how to serve customers with sensory, mental health and cognitive disabilities.

It should be noted that implementing the changes to eligibility will satisfy a further two of the eleven outstanding recommendations from the City of Toronto's Auditor General's 2012 report – *Review of Wheel-Trans Services – Sustaining Level and Quality of Service Requires Changes to the Program*, as reflected in Appendix F. The remaining recommendations will be satisfied by total implementation of the Wheel-Trans Transformation Program.

Stakeholder and Public Engagement

To ensure we developed the most customer-focused approach, the recommended changes and migration plan involved significant outreach and input from external partners. Over a span of three months (June – August 2016), TTC engaged the public, advocacy groups,

peer agencies, as well as with ACAT at multiple points as we iterated on the eligibility changes and processes.

As recommended by the Board, TTC conducted extensive public and stakeholder consultations to vet the proposed changes and ensure they are fair and do not adversely impact present and future customers. Four public meetings were held across the city and all were well attended.

TTC conducted over 40 meetings with 54 agencies and groups representing a range of interests. The complete list of agencies is provided in the Appendix D, and includes:

- Local, provincial, and national agencies
- Medical and legal communities
- Municipal and provincial stakeholders
- Major exhibitions

To ensure alignment across the region, the Greater Toronto and Hamilton Area Paratransit Working Group meets approximately once a month to share knowledge and collaborate on matters of joint interest. In addition to receiving direct feedback on the eligibility materials being prepared, the TTC also reached agreement in principle for a memorandum of understanding to obtain alignment on key elements of eligibility including:

- Common specialized transit customer application form
- Eligibility standards for specialized transit customers
- Shared recognition policies
- Service delivery models (e.g. Family of Services integration)
- Support person policies

The TTC conducted a review of industry best practice, including discussions with peer agencies across North America. The list of peer agencies considered is provided in the Appendix D.

In addition to the above, Wheel-Trans undertook a validation exercise using a small sample of customer volunteers to assess the new process, including the viability and suitability of various functional assessments.

Significant changes arose from the public, agency and volunteer feedback. Notably, the application form was reduced in length substantially. As well, selection of assessments changed from evaluating an individual's disability and focused on evaluating an individual's ability to use conventional transit. Expanded highlights of the feedback received are provided in Appendix D, focusing on the following key themes:

- Application form questions and process
- Use of health care professional(s)
- Appeal process
- Fees

- Customer support
- Functional assessments
- Communication strategies to clients

The extensive public and stakeholder engagements were instrumental for staff to learn directly from the community it serves. The result is a new customer-focused application process expanded to cover the new eligibility criteria and categories, structured around a customer's ability to use conventional transit.

Changes to ACAT Mandate (Recommendation 2)

TTC works very closely with ACAT, consulting them on both operating and project development matters to understand and respond to the challenges faced by people with disabilities and seniors using the various services. Two minor changes are required to the mandate for ACAT so as to better align them with IASR. The recommended changes were developed in consultation with and have the support of ACAT.

For ease of reference, the relevant portion of the mandate is included in Appendix E.

The recommended changes are:

- 2a – The types of disabilities should be expanded to include “mental health and cognitive”
- 2c – The maximum number of advocates, that is individuals not covered under 2a, should be increased to three

By enacting these changes, TTC feels it will have a more complete view of the different kinds of barriers customers may encounter as they travel on our system.

Family of Services Pilot (Recommendation 3)

TTC understands that integrating door-to-door service into the conventional service and booking intermodal trips is a complex organizational change and a sensitive issue for our customers. Furthermore, we recognize this is a concept that's relatively new among specialized transit providers across North America, and as such, best practices are limited, particularly for an operation the size and scale of the TTC. That said, TTC did engage with and collect lessons learned from agencies that have rolled-out Family of Services, including York Region Transit. To assuage fears and reduce risk to the customers, organization and ensure that Family of Services roll-out is a success, TTC plans to pilot the service delivery model in Q2-Q3 2017. The pilot will allow TTC to refine the Family of Services delivery model in collaboration with its customers so that it provides maximum opportunity for customers to safely and spontaneously travel across the city with dignity and freedom of travel.

For the pilot, Wheel-Trans will recruit a group of volunteer customers drawn from both existing and new customers and book and deliver Family of Services trips on specifically selected routes, stops and stations to gather customer input and feedback, determine specific criteria for success and track the requirements necessary for full implementation and roll out of the official program. Periodically Wheel-Trans will reflect and update the processes through which this is undertaken to improve the customer experience based directly on actual customer feedback and input.

The pilot will simultaneously allow TTC to work through any challenges and impediments related to service integration and delivery and develop a customer base that can serve as ambassadors of the program.

Wheel-Trans presently has existing customers that use the service to access the subway and bus network – in a sense, these are customers that are already using TTC’s Family of Services but without the supports that the organization plans to deliver in the pilot and beyond (such as constant monitoring of the functionality of the escalators and elevators throughout the system and adjustment of routes where necessary). We will continue to analyze trip patterns to identify potential Family of Services customers who will be able to reap the benefits of the expanded and more spontaneous and flexible services. In addition, this captured origin and destination data will input to better prioritize implementation and roll out into other accessibility programs such as the Easier Access program.

A series of incentives and supports are being considered and developed to encourage customers to try the new way of travel and volunteer to participate in developing the formal program. First and foremost, a travel assistance program will be offered to customers that wish to gain familiarity and confidence in part or all of the conventional system. These types of ‘travel training’ programs have been shown to be successful in other areas – York Region Transit has one such program and has had great success supporting customers as they migrate onto the conventional system. TTC is also expecting to offer same-day booking to customer volunteers, as their shorter and more local trips would be easier to schedule in this fashion.

For the pilot, Wheel-Trans will select specific routes and associated accessible stops and stations that best suit customer volunteer journey patterns and manually book and schedule Family of Services trips based on a customer’s ability, starting point and destination. Future elements of the Wheel-Trans Transformation Program include upgrades or replacement of existing systems to support and more efficiently complete these tasks, including the procurement of latest technology to enable dynamic booking and scheduling by the customers via a smart phone device or tablet. The lessons learned from the pilot will support these system procurements/upgrades by revealing requirements and considerations for how the system should operate to maximally support the organization and its customers. Lastly, the front line employees on the selected routes and associated stations will receive additional sensitivity training, including serving customers with sensory, mental health and cognitive disabilities and guidance on how to best serve customers with accessible needs as well as advance notice of the daily family

of services pilot trips to provide support to customers throughout their journey beyond the Wheel-Trans vehicle.

The benefit to piloting prior to implementation is that during and after the pilot period, TTC expects to have a solid basis for how to efficiently schedule and deliver Family of Services trips going forward with full knowledge of how to best serve and support customers who will be able to partake in multi-modal travel. We also endeavor to ensure that customers receiving Family of Services trips will have a positive, safe, and spontaneous experience, and hope they start sharing their experience with other customers. Finally, any employees involved in the pilot should feel supported through this change, having received adequate training and the right supporting materials, so that they can be ambassadors of change within the organization as well as be better able to support any customers with accessible needs.

Collectively, these and other lessons learned, including improvements to customer policies, will be used to structure future recommendations for expansion of the Family of Services service delivery model.

Migration Plan for Existing Customers (Recommendation 4)

Presently, Wheel-Trans customers are categorized as either permanent or temporary. Permanent customers have access to door-to-door services under the current operating model, and are required to re-certify with the program on an exception-only basis. Temporary customers have access to door-to-door services for up to twelve months, at which point they must request an extension or apply for permanent eligibility.

TTC recommends that on January 1, 2017, existing customers retain their current access to full Wheel-Trans services and over the subsequent three years will be requested to provide additional information to determine which category of eligibility they are best suited to, based on their needs. Existing customers with permanent eligibility will receive conditional or unconditional eligibility according to their ability to use conventional transit. Customers with temporary eligibility will be migrated after their current eligibility expires should they request an extension.

Customers able to partake in Family of Services trips will be engaged with first, with a focus on those customers that use Wheel-Trans most frequently.

By undertaking this migration plan, we ensure that no customer is left in a state of limbo as eligibility categories and processes change. Furthermore, customers able and wanting to use the Family of Services will have early opportunities to participate in our program, receiving the benefits outlined in this report, including access to travel assistance program, same-day booking, and an overall increase in spontaneity of travel.

Next Update

Wheel-Trans demand has increased dramatically in recent years, and is projected to increase further given the City of Toronto's aging population and expanded eligibility mandated by the IASR. The Wheel-Trans 10-Year Strategy focuses on a new Family of Services delivery model that will empower customers and increase the efficiency of service delivery so that the organization can continue to deliver reliable service to registered customers in a financially sustainable way.

Through this report, the Board is asked to note the changes to Wheel-Trans eligibility categories to be compliant with requirements of the IASR, and to approve expansion of the mandate for ACAT, commencement of a Family of Services pilot in 2017, and a migration plan for existing customers.

The next year is one of major change and expanded travel opportunities for new and existing customers. We understand that for many customers, such change also represents a source of anxiety and concern. The 2016 external engagement efforts and 2017 Family of Services pilot represent early efforts to gradually introduce these changes in a controlled fashion; they are also a vital opportunity to collect lessons and receive feedback so that the roll-out of the new service delivery model improves our customer's transportation options and quality of life. Public and external agencies are going to be continuously consulted on all facets of Wheel-Trans transformation as the program is implemented. We will also continue to work with our GTHA partners to improve cross-boundary travel options, common eligibility from region to region and a shared application form.

TTC expects to provide an update to the Board on the Wheel-Trans 10-Year Strategy in the 4th Quarter of 2017. The update is expected to cover:

- Any residual items related to eligibility changes
- Lessons learned from the Family of Services pilot
- Implementation plan for expanded roll-out of Family of Services service delivery model
- Updated program budget including technology to leapfrog the agency's capacity to deliver with dignity high-quality, efficient and spontaneous trips to our customers

Contact

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Attachments

Please refer to the following support documents for additional information:

- Appendix A – Additional background information
- Appendix B – Wheel-Trans Transformation Program details
- Appendix C – Details to eligibility changes
- Appendix D – Details to stakeholder and public engagement
- Appendix E – ACAT mandate (excerpt)
- Appendix F – Auditor General recommendations (excerpt)
- *Wheel-Trans 10-Year Strategy – February 25, 2016 TTC Board Report*
http://www.ttc.ca/About_the_TTC/Commission_reports_and_information/Commission_meetings/2016/February_25/Reports/W-Trans_10_Year_Strategy_Update_combined.pdf
- *Auditor General's Report – Review of Wheel-Trans Services – Sustaining Level and Quality of Service Requires Changes to the Program, 2012*
https://www.ttc.ca/About_the_TTC/Commission_reports_and_information/Commission_meetings/2012/December_19/Reports/Auditor_General's_Re.pdf
- *2016 Accessibility Plan Status – February 25, 2016 TTC Board Report*
http://www.ttc.ca/About_the_TTC/Commission_reports_and_information/Commission_meetings/2016/February_25/Reports/2016_Accessibility_Plan_Status_Report_BR_17780_V2.pdf

APPENDIX A – ADDITIONAL BACKGROUND

About Wheel-Trans

Wheel-Trans, a division of the TTC's Service Delivery Group, is a 24/7 specialized transit service provider for residents of the City of Toronto who qualify based upon physical functional mobility restrictions (e.g. requiring a mobility device).

The organization has an operating budget in excess of \$100M and currently provides more than 11,000 door-to-door trips per day. The organization's unaccommodated rate goal of less than 1% essentially ensures every customer who requests a trip, receives a trip. Service is provided through a fleet of 201 buses, 210 contracted accessible taxis, and contracted sedans. Wheel-Trans also operates a community bus service on five fixed routes on weekdays only.

TTC Wheel-Trans Key Statistics

*Over 48,000 active customers
(75% seniors)*

11,000 daily trips provided

\$100M Operating Budget

Demand for Wheel-Trans service has increased by more than 29% over the last five years with an unprecedented 12.5% increase in 2015. For 2016, TTC budgeted to provide a projected 3.65M trips; however, the current year-end projection is 3.95M trips – a 13% increase over 2015. In spite of this surge in demand, rejected trip requests have in fact dropped by over 50% from 2015, bringing our unaccommodated rate to record lows, reflecting Wheel-Trans commitment to help its customers achieve maximum mobility. The incremental cost to deliver these additional trips is \$6.6M on a total service delivery budget of \$128M. The demand for services is expected to continue to increase with the aging population and the IASR mandated changes to eligibility. The expectation is that the demand will increase by 20% in 2017 alone, resulting in an estimated service delivery cost of \$154M for 2017.

Operating in a dynamic business environment where many of the variables are outside its control, Wheel-Trans has provided fully accessible services successfully by excelling at the “table stakes” – safety, customer service and operating performance.

Accessibility for Ontarians with Disabilities Act (AODA)

The IASR under the AODA requires all specialized transportation service providers to implement new categories of eligibility for its services no later than January 1, 2017.

At present, eligibility for Wheel-Trans service is based solely on an individual's level of physical functional mobility at home and in the community. An individual's physical functional mobility is assessed based on the permanency of the disability and their ability to maneuver at home and community. The IASR under the AODA broadens specialized transit eligibility to include any and all disabilities that prevent or limit an individual's

ability from using conventional transit. This can include, but is not limited to physical, mental and sensory disabilities.

Specifically, the three categories of eligibility defined in the IASR are:

- Unconditional eligibility: a person with a disability that prevents them from using conventional transportation services.
- Temporary eligibility: a person with a temporary disability that prevents them from using conventional transportation services.
- Conditional eligibility: a person with a disability where environmental or physical barriers limit their ability to consistently use conventional transportation services.

Ontario Human Rights Commission (OHRC)

The OHRC, in its *Policy and Guidelines on Disability and the Duty to Accommodate* states that:

“Accommodation with dignity is part of the broader principle that our society should be structured and designed for inclusiveness. This principle, which is sometimes referred to as integration, emphasizes barrier-free design and equal participation of persons with varying levels of ability... It is based on positive steps needed to ensure equal participation for those who have experienced historical disadvantage and exclusion from society’s benefits. The right to equality can be breached by a failure to address needs related to disadvantage. As the Supreme Court of Canada has observed:

[T]he principle that discrimination can accrue from a failure to take positive steps to ensure that disadvantaged groups benefit equally from services offered to the general public is widely accepted in the human rights field.”

Essentially, the OHRC implies that for the TTC to comply with the full intent of the IASR under the AODA and the Ontario Human Rights Code it must work to integrate accessibility into its conventional modes of bus, subway and streetcar in addition to Wheel-Trans in order to enable people with disabilities the option to travel spontaneously and enjoy the benefits of public transit to the fullest.

APPENDIX B – WHEEL-TRANS TRANSFORMATION PROGRAM DETAILS

Wheel-Trans Transformation Program

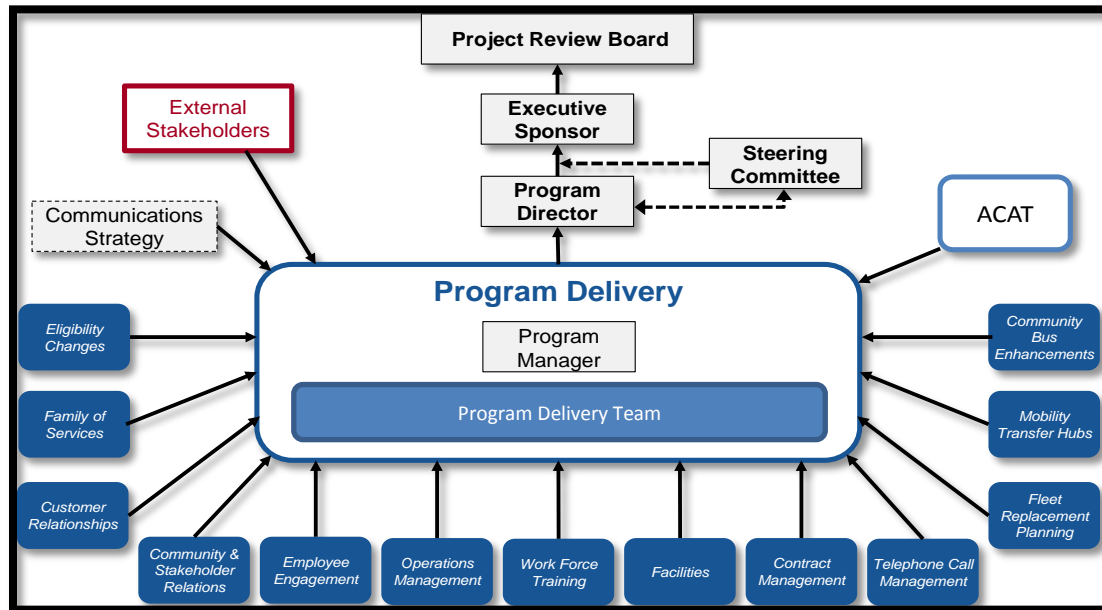
The Wheel-Trans Transformation Program is intended to deliver on the five main recommendations from the Wheel-Trans 10-Year Strategy which focuses on all aspects of Wheel-Trans services including the customer experience, internal processes, relationships with stakeholders and the community as well as the tools, resources and equipment required to deliver on the changes.

The Program is structured around 13 inter-connected work streams that will transform service delivery, customer interface and organizational support of Wheel-Trans to a more modern, customer-focused, efficient, and integrated specialized transit provider:



Wheel-Trans Transformation Program Governance Structure

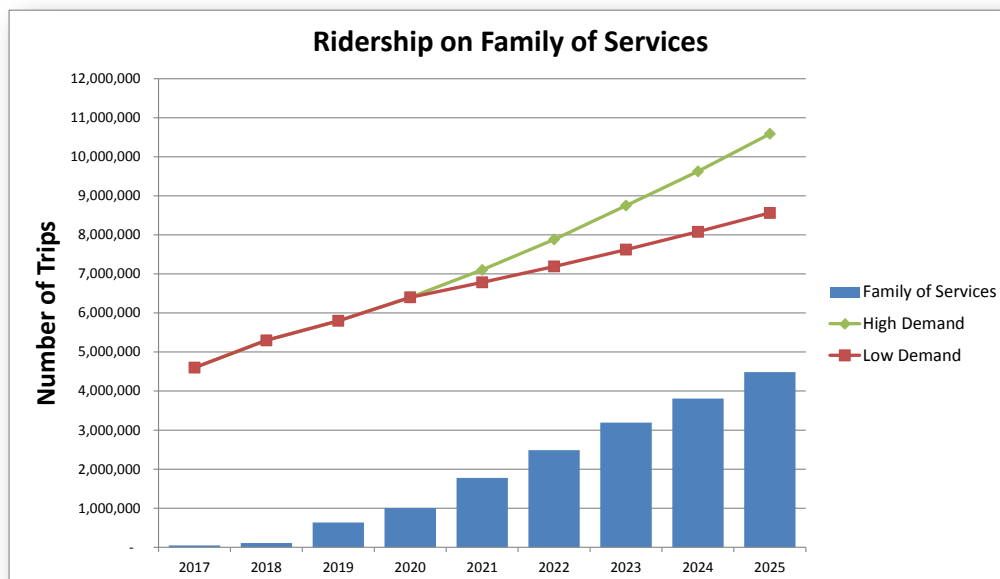
The following is the internal governance structure that was established for the Wheel-Trans Transformation Program.



Internal TTC Stakeholder Working Group and Steering Committees have been created and meet regularly to ensure appropriate input and direction. The two groups are represented by the following departments: Bus Maintenance, Bus Transportation, Change Management, Community Relations, Corporate Communications, Customer Communications, Diversity & Human Rights, Employee Relations, Finance, Information Technology Services, Legal, Portfolio Management Office, Risk Management Office, Stations, Strategy & Service Planning, Training & Development, and Wheel-Trans.

Family of Services Roll-out

A key focus of the Wheel-Trans transformation is implementation of a new Family of Services delivery model. The following presents the anticipated roll-out of the Family of Services, including a 3% target for the 2017 pilot. Over the next ten years, we expect to provide an increasing number of Family Services trips as the TTC's conventional system reaches 100% accessibility. By 2025, it is anticipated that 50% of Wheel-Trans demand will involve Family of Services trips. The following figure presents the anticipated demand forecasts (low and high) for Wheel-Trans, as well as the growth of Family of Services.



Wheel-Trans Transformation Program Business Case

The TTC has completed a business case for the Wheel-Trans Transformation Program, highlights of which are presented below. The business case was part of the prioritization work completed by the TTC as part of its 2017 budget submission. The financial impact of the eligibility changes are represented in the business case in the form of:

- Increased demand for specialized transit services in the City of Toronto, resulting in a greater number of trips having to be planned, scheduled and delivered.
- Increased number of applications for new customers and associated processing and assessing costs.
- Work force adjustments to meet the increase in demand, and in consideration of other initiatives to increase efficiency.
- Extensive stakeholder and public consultations and communications for the transition.
- Training of employees to understand and support the changes.

The Program business case defines the capital and operating impact for the 13 inter-related work streams that form the program. The streams are closely connected; it is not feasible to extract the financial impact of any one stream. The following table presents the overall capital cost estimates for the Program.

Project Costs (in thousands)	2016	2017	2018	2019	2020	2021	Total
Capital Costs	\$ -	\$ 5,600	\$ 8,100	\$ 10,300	\$ 5,950	\$ 4,000	\$ 33,950
Contingency - 25%		\$ 1,400	\$ 2,050	\$ 2,600	\$ 1,500	\$ 1,000	\$ 8,550
Total Capital	\$ -	\$ 7,000	\$ 10,150	\$ 12,900	\$ 7,450	\$ 5,000	\$ 42,500
Operational Costs	\$ -	\$ 1,950	\$ 1,600	\$ 1,000	\$ 100	\$ -	\$ 4,650
Contingency - 10%		\$ 200	\$ 160	\$ 100	\$ 10	\$ -	\$ 470
Total Operational	\$ -	\$ 2,150	\$ 1,760	\$ 1,100	\$ 110	\$ -	\$ 5,120
Total	\$ -	\$ 9,150	\$ 11,910	\$ 14,000	\$ 7,560	\$ 5,000	\$ 47,620

The above investment is expected to result in substantial cost avoidance. Without this Program investment, Wheel-Trans operating subsidy would have to increase rapidly to meet legislative obligations. Investing in the Program will moderate operating cost increases, creating a more efficient structure.

The specific financial benefits anticipated through the program are:

- Reduction of Wheel-Trans trip lengths or avoidance of Wheel-Trans trips through the Family of Services model
- Headcount cost avoidance from more efficient operations and new technologies

The following table presents a summary of the anticipated financial impact of the above benefits to the organization.

Impact (in thousands)	2017	2018	2019	2020	2021	2022	2023	2024	2025	Total
Benefits (Cost Avoidance)										
Family of Services	930	2,100	11,700	19,600	35,300	49,950	65,000	78,450	93,550	356,580
Operating Impact - Headcount Cost Avoidance	-100	-275	-40	-50	30	370	430	695	770	1,830
Subtotal: Cost Avoidance	830	1,825	11,660	19,550	35,330	50,320	65,430	79,145	94,320	358,410
Costs										
Capital Costs	7,000	10,150	12,900	7,450	5,000	0	0	0	0	42,500
Operating Costs	2,150	1,760	1,100	110	0	0	0			5,120
Subtotal Costs	9,150	11,910	14,000	7,560	5,000	0	0	0	0	47,620
Net Difference	-8,320	-10,085	-2,340	11,990	30,330	50,320	65,430	79,145	94,320	310,790

The above estimates represent a Class 4 estimate based on industry standard AACE (Association for the Advancement of Cost Engineering) guidelines. This is an advancement of the Class 5 estimates presented in the February 2016 report. The following table presents a summary of the AACE guidelines:

Exploration	Project & Design Development	Delivery	Operations
<ul style="list-style-type: none"> • Feasibility review • Initial service concept and infrastructure plan 	<ul style="list-style-type: none"> • Initial design work (less than 30%) • Environmental assessment (TPAP) 	<ul style="list-style-type: none"> • Procurement • Detailed design • Construction 	<ul style="list-style-type: none"> • Transition to operations

Exploration	Project & Design Development	Delivery	Operations
development • Initial business case	<ul style="list-style-type: none"> Funding and financing strategy Project deliver assessment/ procurement options analysis Intermediate / full business case 		
Design (less than 10%)	Design (10% - 30%)	Design (30% - 100%)	N/A
Class 4 or 5 cost and schedule estimates	Class 3 or 4 cost and schedule estimates	Class 1 or 2 cost and schedule estimates	
Class 4: L: -15% to -30% H: +20% to +50% Class 5: L: -20% to -50% H: +30% to +100%	Class 3: L: -10% to -20% H: +10% to +30% Class 4: L: -15% to -30% H: +20% to +50%	Class 1: L: -3% to -10% H: +3% to +15% Class 2: L: -5% to -15% H: +5% to +20%	

APPENDIX C – DETAILS TO ELIGIBILITY CHANGES

The changes to eligibility, summarized as follows, will be implemented by January 1, 2017, to meet the IASR deadline:

Subject	Details
Eligibility categories	<ul style="list-style-type: none"> • Re-define Wheel-Trans eligibility as per the AODA criteria set out in the IASR legislation, including unconditional, temporary and conditional eligibility categories
Eligibility criteria	<ul style="list-style-type: none"> • Expanded eligibility to any Ontario Human Rights Code-recognized disability that prevents a person from using conventional transit • This could include persons with physical, cognitive, sensory and/or mental disabilities
Application for new Wheel-Trans services	<ul style="list-style-type: none"> • Introduce new application form <ul style="list-style-type: none"> - Expanded application form that collects information on the abilities of applicants to use conventional transit, which is necessary to determine the eligibility of customers as well as to identify all associated conditions/barriers - New section to be completed by applicant's personal health care professional(s) to validate and enhance their client's input - Alignment of application form with GTHA partners • Introduce new customer application process <ul style="list-style-type: none"> - New processes are essential to both assessing eligibility in the context of new categories as well as allowing TTC to design and plan service and resources - Comprehensive evaluation of application by Wheel-Trans and eligibility determination based on information provided. We estimate that a vast majority of applications will thus not require a functional assessment. - Remaining applicants will undergo a functional assessment by registered health professionals (e.g. Occupational Therapists) based on industry standard tests, who will in turn make recommendation on eligibility • Utilize appropriate functional assessments based on applicants disability(ies) <ul style="list-style-type: none"> - The functional assessment becomes an integral part of evaluating the abilities of an applicant to use conventional transit, and will include the following tests:

Subject	Details
	<ul style="list-style-type: none"> ▪ FACTS (Functional Assessment of Cognitive Transit Skills) ▪ Tinetti Gait and Balance ▪ 175-metre Walking Test ▪ TUG (Timed Up and Go) ▪ MOCA/MMSE (Montreal Cognitive Assessment / Mini-Mental State Examination) ▪ Orientation and Mobility • Enhance the customer appeal process <ul style="list-style-type: none"> - Applicants can request review of their decision, including denial of services and category of eligibility or conditions assigned to customer - Appeal Panel comprised of a medical professional (e.g. Occupational Therapist), transit expert, and individuals with disabilities who uses conventional transit

APPENDIX D – DETAILS TO STAKEHOLDER AND PUBLIC ENGAGEMENT

Public engagement

Four public meetings were held across the city and were attended by over 500 people. The sessions were as follows:

- July 5 - Downtown- Metro Hall
- July 12 – Scarborough Civic Centre
- July 14 – North York Memorial Hall
- July 21 – Etobicoke - Father John Redmond Secondary School

In addition, TTC had a presence and highlighted the Wheel-Trans 10-Year Strategy at the following major public exhibitions:

- People in Motion
- Toronto Seniors Summit

Peer agencies

As summarized in the report, TTC examined the eligibility processes and policies in place at other large metropolitan areas to garner best practices and to serve as a point of comparison to the changes being proposed internally. These included:

- ABQ Ride, Albuquerque, NM
- Access Calgary, Calgary, AB
- Access-a-Ride, NYC, NY
- ADA Paratransit, Sacramento, CA
- ADA Paratransit Service, San Francisco, CA
- Bee-Line ParaTransit, Westchester, NY
- Butte Regional Line, Chico, CA
- Cedar Rapid Transit, Cedar Rapids, IO
- MetroAccess, Washington, DC
- Southeastern Pennsylvania Transportation Authority, Philadelphia, PA
- STO, Gatineau, QC
- Washington County Transit, Hagerstown, MD
- Washington Metropolitan Area Transit Authority, Washington DC, DC
- Translink, Vancouver, BC

Over the past several years, TTC has been actively engaged with regional partners through the Greater Toronto and Hamilton Area Paratransit Working Group. This group consists of Metrolinx and peer agencies in the GTHA that offer specialized public transit service, including:

- Burlington Transit Handi-Van
- Durham Region Transit

- City of Hamilton DARTS
- Oakville Transit care-A-van
- Peel TransHelp
- York Region Transit Mobility Plus

TTC regularly meets with this group, and at present a common focus area is the work being done by each agency to prepare for and implement changes in advance of the AODA IASR deadline.

Stakeholder groups

As summarized in the report, extensive public and stakeholder consultations were held, including over 40 meetings with 54 agencies and groups. The following is a complete list of agencies engaged by the TTC for feedback on the proposed changes.

- Local, provincial, and national agencies
 - Alzheimer’s Society of Toronto
 - Aphasia Institute
 - Autism Ontario –Toronto Chapter
 - Brain Injury Society of Toronto (BIST)
 - Canadian Head Injury Resources Support
 - Canadian Helen Keller Centre
 - CNIB
 - Centre for Independent Living-Toronto
 - Community Living Toronto
 - Epilepsy Toronto
 - LOFT Community Services
 - MS Society of Toronto
 - Ontario March of Dimes
 - Spinal Cord Injury of Toronto
 - Toronto Central CCAC
 - Toronto Central Local Health Integrated Network
 - Toronto Council on Aging
 - Variety Village
 - West Neighbourhood Housing
- Medical and legal communities
 - Arch Disability Law
 - Centre for Addiction and Mental Health Clinical Leadership Team (CAMH)
 - Canadian Mental Health Association-Toronto
 - Holland Bloorview Kids Rehab
 - Ontario Legal Aid-Specialty Clinics

- Local Health Integrated Network (LHIN)
- Ontario Association of Psychotherapists and Mental Health Professionals
- Ontario Medical Association
- Ontario Physiotherapists Association
- Ontario Society of Occupational Therapists
- University Health Network
- Municipal and provincial stakeholders
 - City of Toronto Auditor General
 - City of Toronto Councillors – Briefing Day
 - City of Toronto Director, Equity Diversity and Human Rights
 - City of Toronto Disability Accessibility and Inclusion Advisory Committee
 - City of Toronto-Mayor’s Office
 - City of Toronto Ombudsman
 - City of Toronto Personal Accessibility in Toronto Housing (PATH)
 - City of Toronto Planning
 - City of Toronto Senior Management Team Cluster A
 - City of Toronto- Accountability Table-Toronto Seniors Strategy
 - City of Toronto- Councillor Josh Matlow-Seniors Advocate
 - City of Toronto- Toronto Association of Business Improvement Areas (TABIA)
 - The Honourable David Onley-Special Advisor on Accessibilty, Ontario
 - Ontario Human Rights Commission
 - Metrolinx

Highlights of Feedback

The following are responses to the topics and suggestions from the stakeholder and public consultations:

- Application form questions and process
 - Issue: Question structure should be open-ended
 - Response: The form will employ open-ended questions because it allows applicants and their health care professional(s) the opportunity to explain their ability to use conventional transit.
 - Issue: Uncertainty over existing customer migration
 - Response: The TTC wants to ensure that all customers are treated fairly and equitably, and is therefore asking that all existing Wheel-Trans customers re-certify, however this will be done over a three year period.

- Issue: Access to application form
 - Response: The TTC will make applications available on-line and on paper and will provide other accessible formats upon request.
- Use of health care professional(s)
 - Issue: Type of health care professionals that can complete application form
 - Response: Ensure there is a range of health care professionals (not just family doctors) who are authorized to complete the form. Masters of Social Work will also be authorized to complete the form. For complex disabilities, applicants will have the option of having multiple health care providers complete the application in order to properly document their limitations.
- Appeal process
 - Issue: Make-up of the appeal panel should be customer friendly
 - Response: The appeal panel will include an occupational therapist, a transit expert, and a member of the community that uses accessible conventional transit.
 - Issue: Type of health care professionals involved in appeals
 - Response: The health care professional on the appeal panel should be limited to the range of disabilities they can comment on.
- Fees
 - Issue: Payments to complete application
 - Response: Having the TTC pay for health care professionals' fees related to applications is not financially sustainable given the anticipated number of applicants. The TTC is working with the OMA to streamline the questions on the application which should help reduce the cost administered by the health care provider. The TTC will also pursue the possibility of having the form recognized by the Ministry of Health and Long Term Care. This would eliminate the cost to the applicant.
- Customer support
 - Issue: Existing customer migration
 - Response: Current Wheel-Trans customers will be phased into the new system over a three-year period.
 - Issue: Providing some type of 'travel training' program
 - Response: Travel assistance programs will be available as part of the Wheel-Trans 10-Year Strategy
 - Issue: Offering translation services to support applicants
 - Response: TTC to examine feasibility of providing translation services for non-English speaking applicants.

- Issue: Dealing with larger mobility devices
 - Response: Customers who are unable to maneuver their mobility device onto a crowded transit vehicle may be eligible for conditional service.
- Issue: Booking through alternate means
 - Response: The TTC will introduce alternate means of booking trips including the use of a smart phone app. This will help reduce wait times when booking.
- Issue: Training employees to interact with customers with cognitive disabilities
 - Response: Wheel-Trans and conventional transit employees will be properly trained to ensure they are able to assist customers, particularly those with cognitive disabilities.
- Functional assessments
 - Issue: There should be an interview and a functional assessment
 - Response: A health care professional will conduct an interview in conjunction with administering any functional assessments to ensure that they have a complete understanding of the applicant's ability to use conventional transit.
 - Issue: Accepting recently completed assessments
 - Response: The TTC will accept recently completed assessments from applicants if they are available, thus making the process less onerous on the individual and more cost effective for the TTC.
 - Issue: Including FACTS testing
 - Response: The TTC will integrate FACTS testing (Functional Assessment of Cognitive Transit Skills) which is considered the most reliable assessment of those presented to stakeholders.
- Communication strategies
 - Issue: How to communicate with the public and stakeholders
 - Response: All stakeholders were agreeable to using their existing communication channels (newsletter, website, forums, etc.) to communicate the changes once they were in place.
 - Issue: Pilot testing volunteers
 - Response: We will reach out to agencies that have volunteers to assist and participate in the pilot test in 2017.
 - Issue: Speaking at events
 - Response: The TTC has available employees to speak at stakeholder events to help disseminate details on the planned service-improvements.

APPENDIX E – ACAT MANDATE (EXCERPT)

The current mandate can be found:

http://www.ttc.ca/About_the_TTC/ACAT_Reports_and_Information/ACAT_terms_of_reference.jsp

The following excerpt is the subject of the recommendation presented in this report:

2. ACAT Membership

Membership in ACAT shall be open to interested residents of the City of Toronto who use TTC services — occasionally, frequently or regularly.

The Advisory Committee shall be composed of fifteen (15) members including:

- a. Persons with physical, sensory or communication disabilities.
- b. A minimum of two (2) shall be seniors.
- c. A maximum of two (2) other persons exclusive of those identified in (2a).

2.1 Members of the Advisory Committee shall be appointed for up to a three-year (3) term and one-third of the membership shall be replaced each year.

2.2 Retired members may reapply for a subsequent term following a one-year absence from ACAT.

APPENDIX F – AUDITOR GENERAL RECOMMENDATIONS (EXCERPT)

The following two recommendations from the *Auditor General’s Report – Review of Wheel-Trans Services – Sustaining Level and Quality of Service Requires Changes to the Program, 2012* are going to be addressed with the implementation of the changes recommended in this report:

#	Recommendation
3	Expedite the planning and implementation of an eligibility classification system for Wheel-Trans services in accordance with requirements set forth in the Integrated Accessibility Standards Regulation made under the Accessibility for Ontarians with Disabilities Act.
4	Review and enhance the Wheel-Trans eligibility assessment process and criteria to ensure that applicants’ abilities to use the conventional transit system are objectively and credibly appraised. Steps to be considered should include but not be limited to: <ul style="list-style-type: none">a. Requiring a medical or health certification regarding mobility conditions as part of the application process;b. Considering the merits and cost-effectiveness of incorporating functional evaluations into the eligibility assessment process; andc. Evaluating the effectiveness of the assessment criteria, scoring scheme, and threshold points for eligibility.



WHEEL-TRANS 10-YEAR STRATEGY

Eve Wiggins – Head of Wheel-Trans
September 2016



PROGRAM STATUS

BOARD ACTION - RECOMMENDATIONS

ELIGIBILITY CHANGES

FAMILY OF SERVICES PILOT



PROGRAM STATUS



Drivers

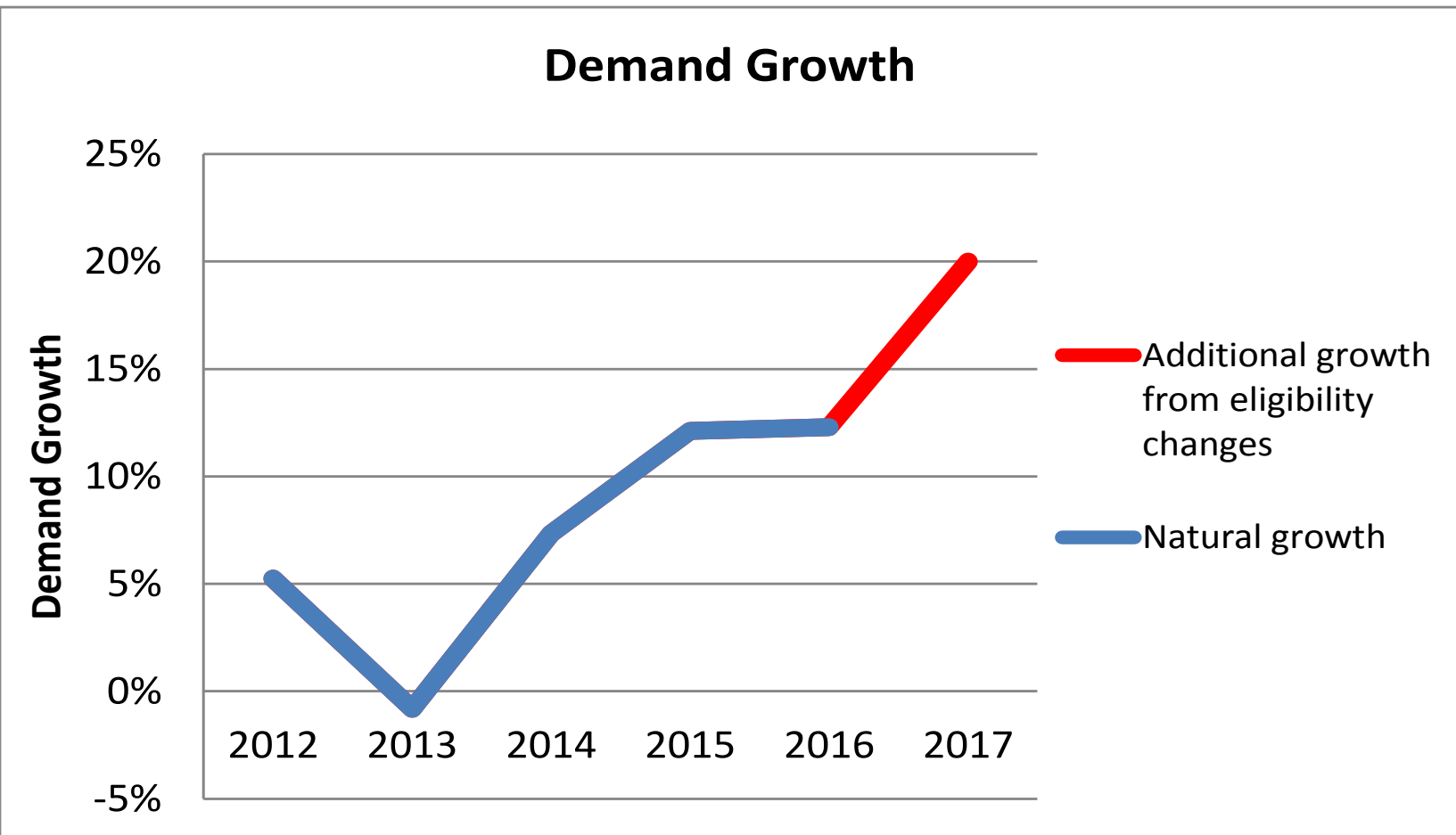
- Expanding AODA requirements
- 2012 Auditor General's report
- Wheel-Trans ridership forecasts
- Investments to improve the accessibility of the conventional system
- Financial sustainability



- **Following February board approval:**
 - **Business case developed**
 - **Finalized specifications for bus procurement**
 - **Change management process initialized**
 - **Developed expanded eligibility framework**
 - **Community bus analysis initiated**
 - **Developed agreement in principle for MOU with GTHA partners**



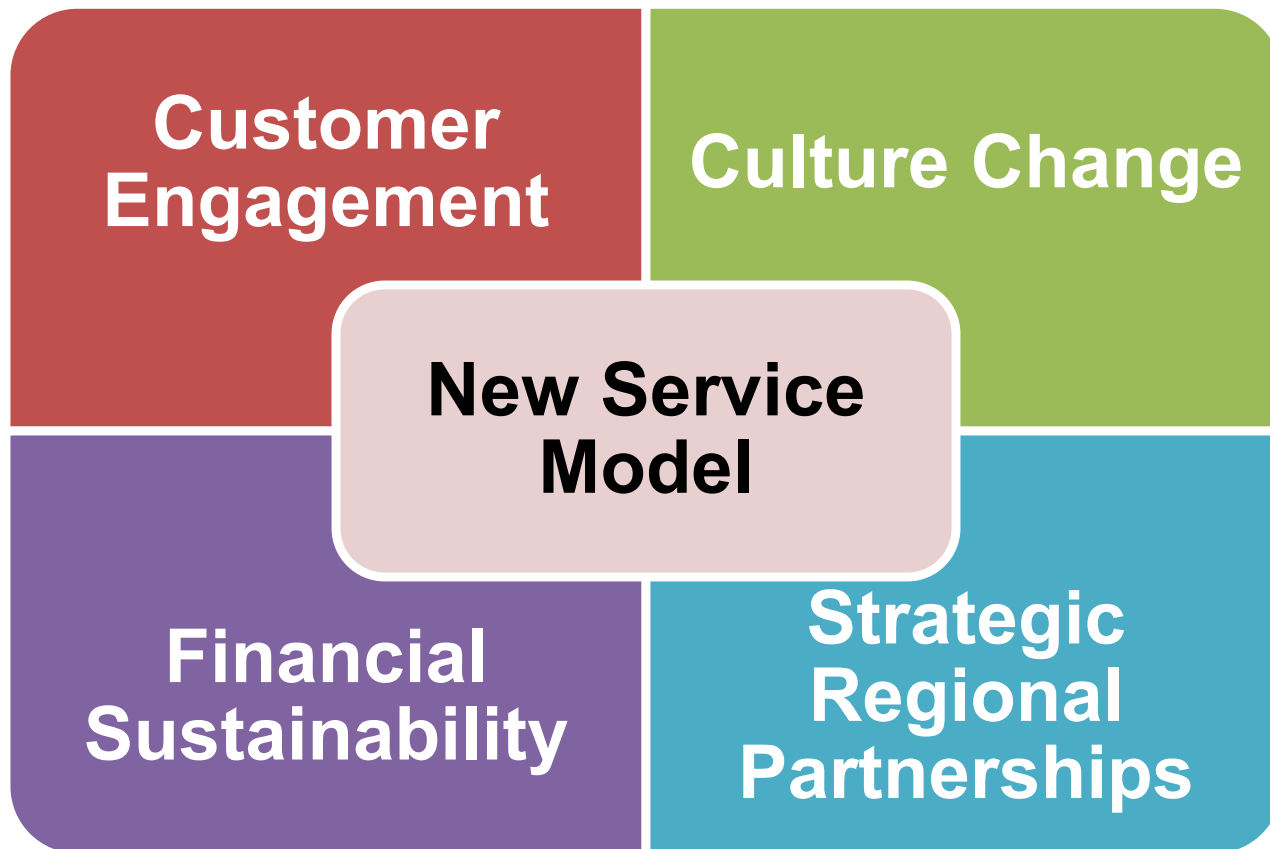
DEMAND GROWTH



2017 growth is made up of 12% continued natural growth and 8% growth from new eligibility



STRATEGIC OBJECTIVES





BOARD ACTION - RECOMMENDATIONS



- 1. Note new eligibility categories**
- 2. Request staff to expand ACAT membership to include persons with mental health and cognitive disabilities**
- 3. Request start of Family of Services pilot in 2017 including improvements to customer policies**
- 4. Approve migration plan for current customers**



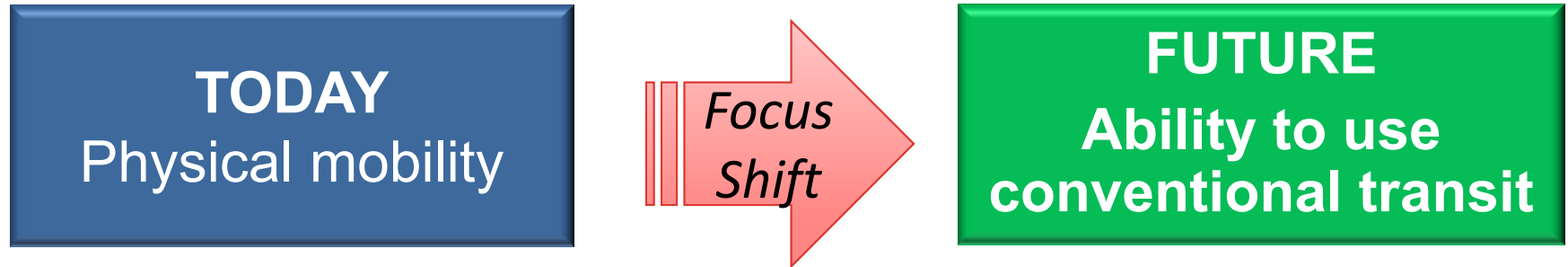
“Getting it right the first time”

- Extensive stakeholder engagement
- Designing service based on our customers
- Re-think *all* policies for *all* customers
- Build partnerships with our GTHA partners



ELIGIBILITY CHANGES

ELIGIBILITY IS EXPANDING



Eligibility will be based on cognitive, mental health and sensory, as well as physical disabilities

AODA requires that by January 1, 2017, Wheel-Trans must have three categories of eligibility:

- Temporary
- Unconditional (Permanent)
- **Conditional (New Category)**

Ensure that service is available to those who need it

EXAMPLES OF CUSTOMER CHANGES



Customer	Today	Tomorrow
Person with physical disability due to a medical condition	Door-to-door	<ul style="list-style-type: none"> Physical disability / conditional with good day/bad day conditions Family of Services & door-to-door
Person with high functioning autism	Not eligible	<ul style="list-style-type: none"> Cognitive disability / conditional by route Travel coaching and conventional travel Door-to-door for other trips
Person with advanced Alzheimer's	Not eligible	<ul style="list-style-type: none"> Cognitive disability / unconditional Door-to-door from home to day program (2x / week)
Senior with severe physical disability	Door-to-door	<ul style="list-style-type: none"> Physical disability / unconditional Door-to-door
Person with mental health disability experiencing acute episodes	Not eligible	<ul style="list-style-type: none"> Mental health disability / conditional with good day / bad day conditions Family of Services & door-to-door
Person with visual impairment	Not eligible	<ul style="list-style-type: none"> Sensory Disability / conditional by route Travel coaching by CNIB and conventional transit Family of Services & door-to-door



FAMILY OF SERVICES

FAMILY OF SERVICES



- Specialized Vehicles
- Community Buses
- Subways
- Streetcars
- Buses



Greater equity, freedom and spontaneity of travel

PILOT DESCRIPTION



Methodology

- Customer volunteers
- Specific routes, stops and stations
- Policy changes
- Training and support

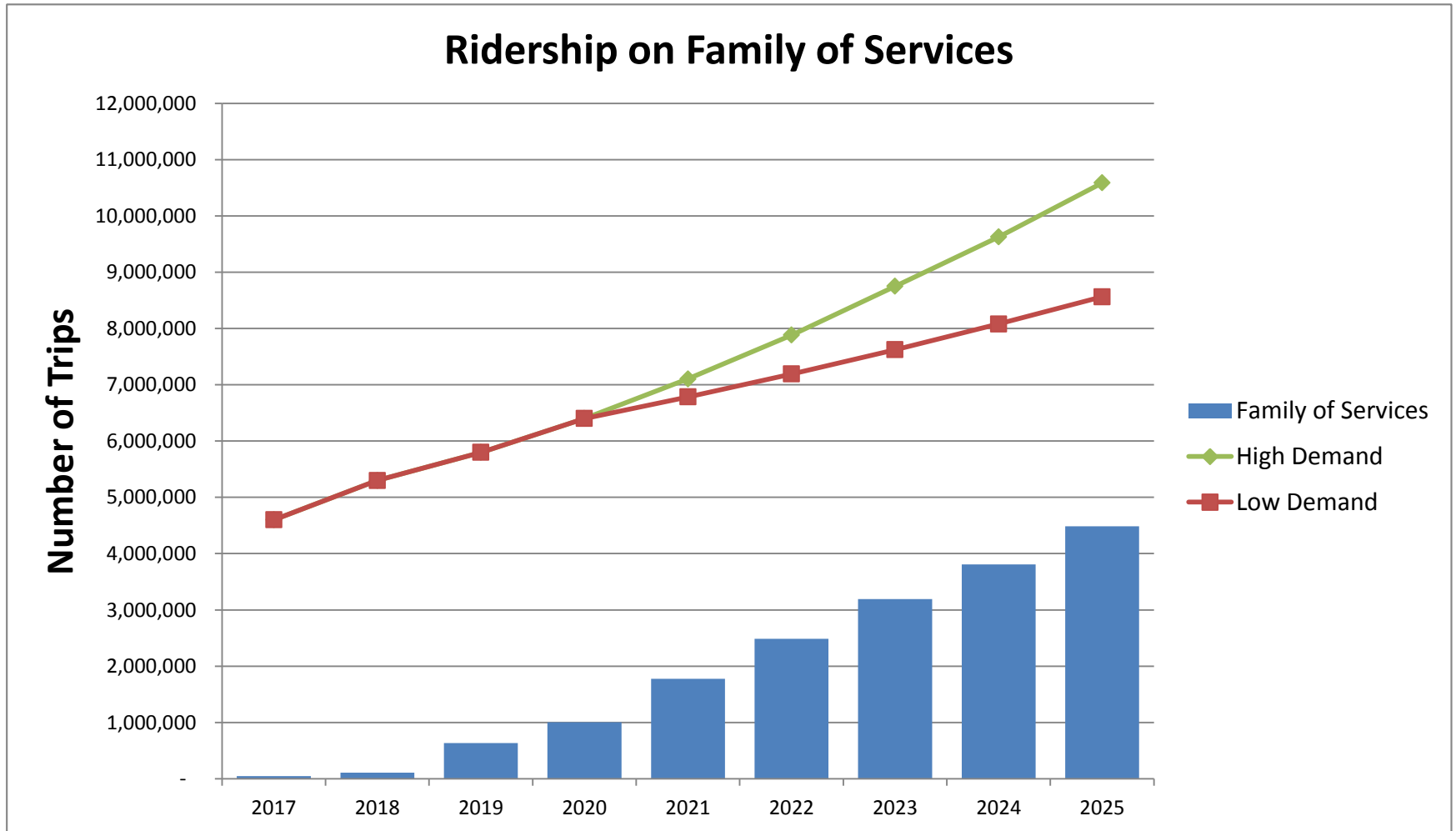
Benefits

- Identifies customer support requirements
- Customers are part of service model design
- Identifies system impediments for mitigation

Criteria for Success

- Customer adoption and ease of use
- System readiness and requirements
- Efficiency opportunities

FAMILY OF SERVICE TRANSITION FORECAST



TIMELINE



2016

- Updated eligibility to address AODA requirements

2017

- Family of Services pilot
- 1-3% of Wheel-Trans services by Family of Services

2020

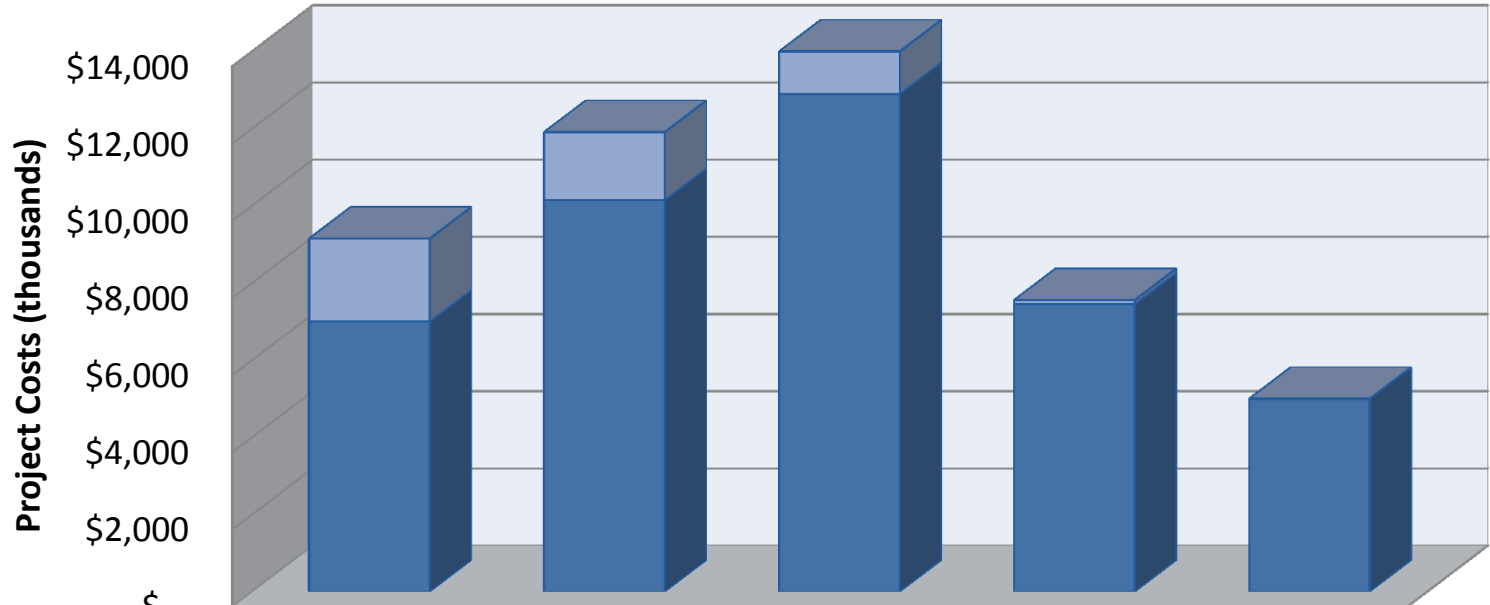
- Full surface accessibility
- 15% of Wheel-Trans services by Family of Services

2025

- Full Station Accessibility
- 50% of Wheel-Trans services by Family of Services



Wheel-Trans 10-Year Strategy Program Costs



	2017	2018	2019	2020	2021
Operating	\$2,150	\$1,760	\$1,100	\$110	\$-
Capital	\$7,000	\$10,150	\$12,900	\$7,450	\$5,000
Total	\$9,150	\$11,910	\$14,000	\$7,560	\$5,000

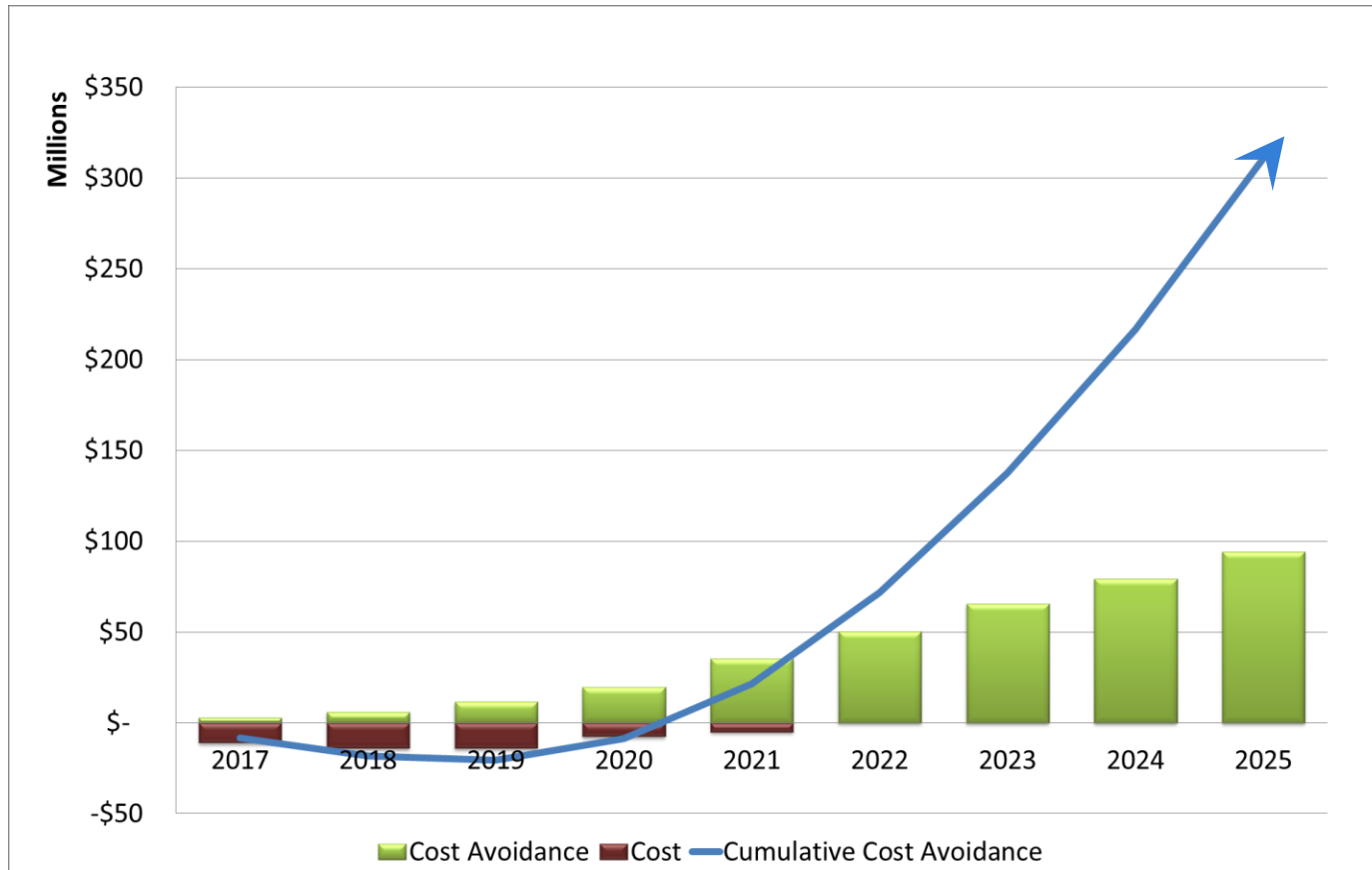
Capital - \$42.5 M Operating - \$5.1 M
Total Program Funding- \$47.6 M



COST AVOIDANCE



Cost Avoidance of 10-Year Strategy



Cumulative cost avoidance over 10 years - \$310 M



THANK YOU



QUESTIONS?

