



Wheel-Trans 10-Year Strategy – April 2018 Update

Date: April 11, 2018
To: TTC Board
From: Chief Service Officer

Summary

This report provides an update on the implementation of the Wheel-Trans 10-Year Strategy and highlights some of the significant achievements since the last update brought forward in September 2016. The report outlines next steps, including expansion of Family of Services (FOS), a refined customer experience and policy review, and rollout of new technology.

Since the last update, the TTC accomplished the following milestones:

- Implemented new eligibility criteria and processes for Wheel-Trans [Q4 2016];
- Held five public meetings to engage and receive customer input [Q2 2017];
- Launched the FOS pilot [Q2 2017];
- Trained 60% of Bus Operators at three divisions associated with the FOS pilot routes in addition to all Wheel-Trans employees on AODA, sensitivity, empathy, and accommodating customers with mental health disabilities [Q1 – Q4 2017];
- Introduced a new Late Cancellation and No-Show Policy [Q3 2017];
- Added 20 new Pro-Master vehicles to the Wheel-Trans fleet [Q3 2017];
- Launched a Community Bus Enhancement pilot [Q3 2017];
- Installed the first Access Hub at Meadowvale Loop [Q4 2017].

By the end of this year, several critical goals will be accomplished:

- The final phase of the FOS pilot will be completed and we expect to begin expanding FOS to more routes and customers;
- Up to three additional Access Hubs are to be installed to support FOS expansion, pending confirmation of location and availability of property and approvals;
- A new Customer Experience Strategy, supported by the development of new customer-centric policies, some of which will be implemented in 2018;
- Introduction of new technology, starting with the Telephony and Customer Relationship Management Systems, as well as the first phase of the Scheduling System redesign which will introduce automation for FOS trip booking;
- Delivery of an additional 60 Pro-Master vehicles.

The above accomplishments and goals will be shared at our upcoming public meetings scheduled from April 18-30, 2018 at various locations across the city.

Recommendations

It is recommended that:

1. The Board receive the report for information.

Financial Summary

In the February 2016 report, TTC presented a \$30 million Class 5¹ estimate for the Wheel-Trans 10-Year Strategy. Based on this estimate, a business case was developed and presented to the Board in the September 2016 report, with a more refined Class 4² overall estimate of \$47.6 million, divided between capital and operating costs for the period of 2017 - 2021. At present, the program estimate is being refined to a Class 3³ forecast taking into consideration refined resource plans and quotes and estimates provided by vendors and third-party providers.

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

The 2018-2027 Capital Budget, approved by City Council on February 12, 2018 included funds in the amount of \$42.5 million under program 3.9 Buildings & Structures, Wheel-Trans Transformation Program. Adjustments to the capital requirement that emerge from the Class 3 estimate will be included in the 2019 – 2028 Capital Plan for the Board's consideration as part of the 2019 Capital Budget process.

The 2018 Wheel-Trans Operating Budget included \$1.6 million for initiatives associated with the Wheel-Trans Transformation Program, in addition to the \$1.0 million incurred under the 2017 Wheel-Trans Operating Budget . Operating funds required in 2019-2021, previously estimated at \$2.5 million total, will be incorporated into future Wheel-Trans operating budgets for the Board's consideration.

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

Equity/Accessibility Matters

The goal of the Wheel-Trans 10-Year Strategy is to make the TTC's Wheel-Trans service more accessible, equitable, inclusive and sustainable for existing and future customers.

¹ Classification based on the industry standard Association for the Advancement of Cost Engineering (AACE) guidelines. Class 5 estimate is used as 'concept screening' with minimal information being the basis for the estimate and an expected accuracy range of -50% to +100%.

² AACE defines Class 4 estimate as a 'study' with concept design being the basis of the estimate and an expected accuracy range of -30% to +50%.

³ AACE defines Class 3 estimate as a 'baseline estimate' having used preliminary design, outline specifications, and relevant constraints as the basis of estimate and an expected accuracy range of -20% to +30%.

Towards achieving that goal, and in compliance with the *Integrated Accessibility Standards Regulation (IASR)* under the *Accessibility for Ontarians with Disabilities Act (AODA)*, Wheel-Trans service and eligibility criteria have been expanded to include any persons who have a disability that prevents them from consistently using conventional transit for all or part of their trip. Moreover, the FOS delivery model integrates specialized service into the TTC's broader suite of accessible conventional transit services, providing Wheel-Trans customers with greater access, flexibility and spontaneity of travel. While some customers will continue to require door-to-door Wheel-Trans service as their primary or sole means of travel; others can access a combination of services and support tools through the FOS model.

The TTC has consulted extensively with Wheel-Trans customers, members of the public, community organizations and other stakeholders, including TTC's *Advisory Committee on Accessible Transit (ACAT)*, to ensure the Wheel-Trans 10-Year Strategy transformation is carried out in a manner that is accessible and inclusive.

Decision History

The Auditor General performed an Audit Work Plan, which included a review of Wheel-Trans operations with the objective to assess its effectiveness, efficiency, and identify areas of improvement.

2012 Auditor General's Report – "Review of Wheel-Trans Services – Sustaining Level and Quality of Service Requires Changes to the Program":

[https://www.ttc.ca/About the TTC/Commission reports and information/Commission meetings/2012/December 19/Reports/Auditor General's Re.pdf](https://www.ttc.ca/About%20the%20TTC/Commission%20reports%20and%20information/Commission%20meetings/2012/December%2019/Reports/Auditor%20General's%20Re.pdf)

The Wheel-Trans 10-Year Strategy was first introduced and approved by the TTC Board in February 2016, which outlined its objectives and the approach in which it was developed.

The February 25, 2016 TTC Board Report - "Wheel-Trans 10-Year Strategy":

[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)

The TTC Board was provided with the TTC Wheel-Trans 10-Year Strategy progress update in September 2016, which received approval for changes to Wheel-Trans eligibility and ACAT mandate, commencement of the FOS pilot, and the FOS migration plan for existing customers.

The September 28, 2016 TTC Board Report - "Wheel-Trans 10-Year Strategy Update":

[https://www.ttc.ca/About the TTC/Commission reports and information/Commission meetings/2016/September 28/Reports/4 Wheel-Trans 10-Year Strategy - September 2016 Update.pdf](https://www.ttc.ca/About%20the%20TTC/Commission%20reports%20and%20information/Commission%20meetings/2016/September%2028/Reports/4%20Wheel-Trans%2010-Year%20Strategy%20-%20September%202016%20Update.pdf)

The 2017 Accessibility Plan status update was presented and approved by the TTC Board with the direction to have annual status updates on the progress of the Multi-Year

Accessibility Plan, which includes the Wheel-Trans 10-Year Strategy and Transformation Program.

April 20, 2017 TTC Board Report - "Accessibility Plan Status Update":

[https://www.ttc.ca/About the TTC/Commission reports and information/Commission meetings/2017/April 20/Reports/9 2017 Accessibility Plan Status Report BR%2018389.pdf](https://www.ttc.ca/About%20the%20TTC/Commission%20reports%20and%20information/Commission%20meetings/2017/April%2020/Reports/9%202017%20Accessibility%20Plan%20Status%20Report%20BR%2018389.pdf)

Issue Background

In the February 2016 Board Report, staff summarized the underlying drivers for the Wheel-Trans 10-Year Strategy, and specifically laid out changing eligibility requirements under the IASR, and the growing customer demand for improved transit service. This justified the development of a new on-demand service delivery model and the implementation of intermodal trip booking through FOS.

In September 2016, staff provided an update following months of customer, community and stakeholder consultations, which confirmed the need to implement the proposed approach. That Board report contained an overview of the newly scoped out Wheel-Trans Transformation Program, intended to deliver the changes called for in the Wheel-Trans 10-Year Strategy. It outlined the importance of implementing eligibility changes mandated by the IASR before January 2017, expanding the composition and Terms of Reference of ACAT to support these changes, launching an FOS pilot and implementing the migration plan for existing customers.

The implementation of the technological, operational and infrastructure changes to transform Wheel-Trans began in 2017 and will continue through to 2021. However, benefit realization will not be fully achieved until broader accessibility investments at the TTC are completed; namely, the new streetcars that will replace the remaining inaccessible surface vehicles (anticipated completion date of 2019), and the Easier Access Program Phase III, which will render all TTC subway stations accessible for 2025.

Comments

The Wheel-Trans Transformation Program was established to implement the Wheel-Trans 10-Year Strategy. The program was designed and is following the TTC's Project Management Framework surrounding effective and transparent management of scope, schedule and budget.

The TTC frequently consults with ACAT on all facets of the WTTP, gaining valuable feedback and ensuring that the changes being undertaken have all our customers in mind.

This section will provide further detail on what was accomplished and the next steps required to effectively implement the Wheel-Trans 10-Year Strategy.

Family of Services (FOS)

Integrating Wheel-Trans door-to-door service with the TTC's accessible conventional services is the cornerstone of the Wheel-Trans 10-Year Strategy and was enabled by the eligibility changes enacted on January 1, 2017. (See Appendix 1 for more details on changes to eligibility). Termed Family of Services, it involves inter-modal trip bookings and travel by customers between Wheel-Trans service and conventional service.

To facilitate the necessary operational changes as well ensure customers were fully involved in the changes, the TTC began a FOS pilot in Q2 2017. (See Appendix 2 for pilot background, phase overview and lessons learned). The purpose was to gradually test service integration and to assess operational and process requirements needed to make full integration successful. Customer volunteers were recruited to take FOS trips.

The TTC analyzed subway stations and bus stops to assess their respective readiness for the new service model and hired a consultant to complete an audit of accessible subway stations and bus stops along the pilot routes. This study was conducted from a customer's perspective and served to evaluate the compliance of these stations and stops as defined by the AODA.

To support the FOS model, the TTC is implementing a network of Access Hubs – enhanced bus shelters to serve as transfer points between Wheel-Trans service and the accessible conventional bus services (Figure 1). The first Access Hub was successfully installed at the Meadowvale location (Meadowvale Rd. and Sheppard Ave. E.) in Q4 2017 and is in operation. Up to 12 Access Hubs will be deployed by 2021 (Appendix 3) at locations across the city. The TTC has engaged with key partners to plan for the future Access Hub installations alongside public works and future development projects.

Figure 1: Access Hubs



A New Customer Experience

The Wheel-Trans 10-Year Strategy aims to create an experience that provides customers with freedom, dignity and spontaneity of travel. A new Wheel-Trans Customer Experience Strategy was developed to ensure consistency and clarity in customer interaction and employee service delivery. The strategy is supported by new customer-centric policies that define a clear and transparent set of expectations - from trip booking through trip delivery.

Over 20 new customer-facing policies have been drafted with extensive stakeholder review, including consultation with ACAT, TTC Legal, and Human Rights & Diversity. Wheel-Trans customer policies are divided across four categories: eligibility, trip-booking, travelling with Wheel-Trans and safety. Policy implementation began in 2017 and will continue in 2018.

See Appendix 4 for more information regarding the Wheel-Trans Late Cancellation and No Show Policy which was implemented in Q3 2017.

Technology Modernization

Modernizing our supporting technology is a fundamental component to ensuring the TTC's ability to deliver on the vision and commitments of the Wheel-Trans 10-Year Strategy:

1. Incident Management System

With the FOS integration, disruptions to conventional service will impact Wheel-Trans customers. To mitigate this, the TTC deployed its existing Incident Management System - Integrated Communications System (ICS) at Wheel-Trans to allow dispatchers to respond and reroute scheduled trips in real-time. The system is set to be in operation this April.

2. Telephone Systems

A new telephone system is being implemented that will bring modern features to our contact centre, and offer the capacity to manage higher call volumes, provide information on the expected wait-time, and offer a call-back feature for customers who prefer not to wait on hold. It will also enable improved quality monitoring and allow for supervisory support ability. System testing and training is underway and is expected to go live this June.

3. Customer Relationship Management (CRM) System

The TTC is implementing a new CRM system to manage customer feedback, centralize customer information, improve responsiveness to customer comments, and provide for efficient reporting. The system is presently in testing and training stage and is slated to go live this July.

4. Reservations, Scheduling and Dispatch System

An automated multi-modal trip-booking system is crucial for the success of the new service model as it enables high-volumes of FOS trips to be booked and delivered. The TTC is planning to upgrade the existing system using a phased

approach between 2018 and 2021. The modernized reservations system will be mobile friendly and will include conventional transit schedules when offering trip options. Anticipated for early 2019 is a mobile app, as well as other expanded functionality to further improve the customer experience when booking and traveling.

Community Bus Enhancements

Diverting customer trips to an enhanced and expanded community bus service is one of the strategies that were identified in the Wheel-Trans 10-Year Strategy.

Community bus service lends itself well to use by seniors and persons with disabilities due to the vehicle type used and the strategic placement of stops at locations, such as plazas, supermarkets, hospitals, senior residences, and other community service locations. Furthermore, in addition to stopping at all conventional bus stops along the route, the community bus can be hailed or waved down so customers don't have to worry about reaching the stop in time.

Following consultant recommendations and best practices, a pilot was launched in Q3 2017 to enhance two of the five existing community bus routes: 400 Lawrence Manor and 404 East York. (See Appendix 5 for the community bus route information). This included extending both routes to more key destinations and landmarks that are of importance to our customers and adding a bus on both routes. The pilot also involved establishing a distinctive brand and raising awareness about the community bus service. Community bus vehicles were painted in new livery, with clearer visuals to make it easier for Wheel-Trans customers to identify and wave down vehicles. The community bus pilot has been extended to Q4 2018 in order to gather more data and customer feedback. This will be followed by an assessment to be presented to the Board in 2019.

Fleet Replacement

Wheel-Trans has begun to diversify its fleet mix to match new customer profiles, trip patterns and travel behaviour. To date, 20 new Dodge Pro-Master vehicles have been added to the fleet, with 60 more planned for delivery in 2018. These mini-buses are smaller, more fuel efficient and can easily access more destinations (Figure 2).

Figure 2: Dodge Pro-Master mini-bus



Next Update

Significant work has been completed to advance the Wheel-Trans 10-Year Strategy in 2017 and will continue through 2018 and beyond. This report has summarized many of these successes and also laid out some of the key upcoming activities to be undertaken over the next year.

The TTC expects to return to the Board and provide an update on the Wheel-Trans 10-Year Strategy in Q2 2019, which will cover:

- Status and long-term plans for FOS and Access Hub roll-out;
- Impacts on customers and operations related to travel training pilot and policy changes;
- Results of the Community Bus Enhancement pilot and recommendations;
- Status of the technology modernization efforts.

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Attachments

Appendix 1 – Changes to Eligibility
Appendix 2 – Family of Services (FOS) Pilot Phasing
Appendix 3 – Access Hub Opportunities
Appendix 4 – Wheel-Trans Late Cancellation and No-Show Policy
Appendix 5 – Community Bus Pilot Routes

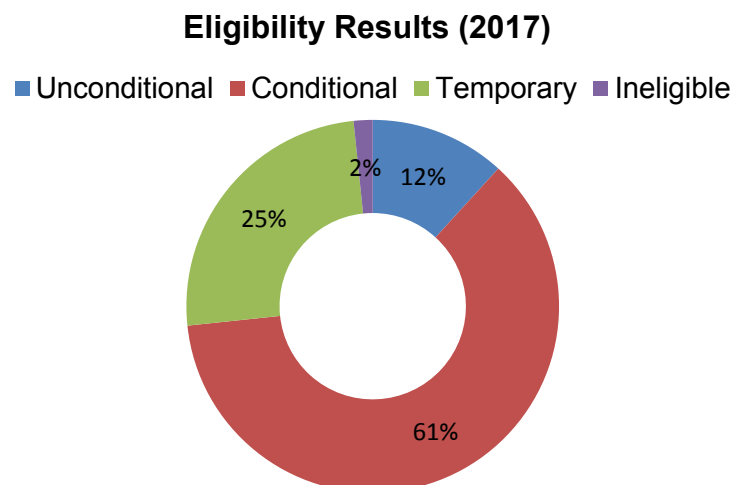
Appendix 1 - Changes to Eligibility

Effective January 1, 2017, the TTC expanded its Wheel-Trans eligibility criteria and service model, in compliance with the *AODA*, *IASR*. Prior to 2017, Wheel-Trans eligibility was based on a person's physical mobility. The expanded criteria extended eligibility to any person who has a disability that prevents them from taking conventional transit for all or part of their trip, including persons who have cognitive, sensory and/or mental disabilities. The TTC also introduced new eligibility categories: Conditional, Unconditional and Temporary, as well as the necessary framework of policies and processes to support these changes.

The new application process was developed through a diversity and inclusion lens, with extensive consultation with customers and community groups, and in close alignment with peer agencies in the GTA for the convenience of customers registering in multiple jurisdictions. Previously, every customer was required to attend an in-person interview to assess their eligibility for Wheel-Trans service. Now, customers submit an application with a section to be completed by a healthcare professional. In limited cases, where a decision cannot be reached, the customer is requested to attend a functional assessment conducted by a licensed occupational therapist.

The new assessment method has proven both successful and efficient. Although the number of applications received in 2017 increased by 4.6%, we are still able to process 100% of applications within the 14-day timeframe mandated by the *AODA*. Functional assessments were required for only 5% of the total applications processed. The majority of customers who applied were granted conditional eligibility (Figure 3), and less than 1% of decisions were appealed.

Figure 3: 2017 Customer eligibility composition



Appendix 2 - Family of Services (FOS) Pilot Phasing

The FOS pilot commenced on May 30, 2017 with the purpose of evaluating how to best implement the program considering potential challenges and/or differences in implementation tactics.

The bus routes were selected based on service frequency, Wheel-Trans customer travel patterns and proximity to major landmarks.

Phase 4 of the pilot will come to a close on April 30, 2018, with further implementation and expansion of the program scheduled for 2018. This will include the roll-out of additional surface routes and wayfinding improvements based on results of the pilot.

Phase 1 May 30/17 - Aug 7/17	Phase 2 Aug 8/17 - Oct 22/17	Phase 3 Oct 23/17 - Feb 11/18	Phase 4 Feb 12/18 - Apr 30/18
Subway: Customer drop-off	Subway: Customer drop-off and pick-up	Subway: Customer drop-off and pick-up	Subway: Customer drop-off and pick-up
Bus: n/a	Bus: n/a	Bus: Customer drop-off	Bus: Customer drop-off and pick-up



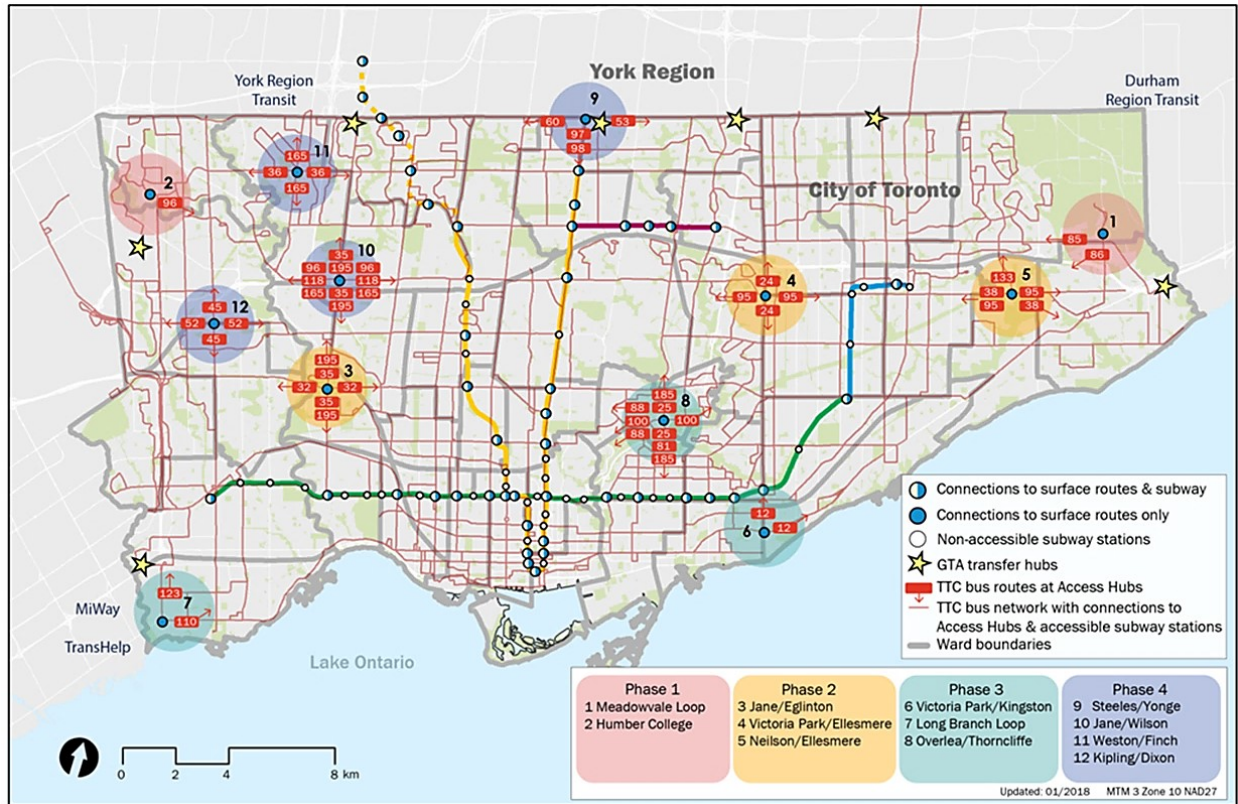
Family of Services Pilot – Lessons Learned

To date, the FOS pilot has yielded four very important lessons learned that must be addressed to enable widespread adoption of FOS:

- **Service must be expanded to create a more robust FOS network.** Wheel-Trans customers travel to all parts of the city, requiring a vast FOS network to suit their trip patterns. This will involve expanding to more conventional bus routes, as well as looking at integration to the accessible streetcar network. This expansion is set to begin in Summer 2018.
- **Customers are reluctant to try the conventional system or don't understand the services available.** Although this was heard through various feedback mechanisms, customer feedback shows that once they try FOS, many are very satisfied with the service. We will continue to engage our conditional customers by offering FOS trip options and educating them on the available support tools, such as the FOS reservations line, priority line and trained staff on buses and subway stations. In addition, a Travel Training Pilot has been developed that is set to launch broadly in Q2 2018. It is comprised of both informational and on-transit sessions for Wheel-Trans customers as they use the TTC's accessible conventional services.
- **Automated multi-modal trip-booking is required.** Manual booking of FOS trips is quite time consuming and the goal of growing ridership increases the call time required by Wheel-Trans reservationists to book the connecting trips. As a result, we are limited by how many trips we are able to book. To mitigate this, the TTC is accelerating the plans to introduce an automated booking tool, with an initial solution in place for Q4 2018. The accelerated plan is essential to achieving the transformation goals of the Wheel-Trans 10-Year Strategy.
- **Customers are choosing to change their travel habits as we make it easier to travel on all modes.** Wheel-Trans demand data shows that previously forecasted significant growth in trip demand never materialized despite the increase in the overall number of Wheel-Trans customers. This suggests that more customers are using conventional services rather than door-to-door.

Appendix 3 - Access Hub Opportunities

Possible Access Hub locations in four phases:



Appendix 4 – Wheel-Trans Late Cancellation and No-Show Policy

The Wheel-Trans Late Cancellation and No-Show Policy, was totally revamped and successfully implemented in Q3 2017 after consultation with ACAT members. As a result, the window for trip cancellation is now expanded, allowing customers to cancel a trip up to four hours before a scheduled pick-up, compared to the night before as with the original policy. The revised policy also incentivizes customers to cancel prior to their vehicle arriving as opposed to canceling at the door or not being at the pick-up location.

The 2017 Wheel-Trans Customer Satisfaction Survey results show high satisfaction with the revised policy:

- 81% of customers are satisfied with the policy;
- 78% of customers agree that the new policy is more convenient;
- 75% of customers agree that the new policy offers more independence.

Initial results also indicate a moderate benefit operationally - the number of customer violation letters has declined while the overall rate of late cancellations and no-shows has remained steady. This may not seem substantial, however from a customer facing perspective, this new policy reduced the focus on punishment and threat of suspension, while providing customers greater freedom to book and cancel as their circumstances change.

Appendix 5 - Community Bus Pilot Routes

400 Lawrence Manor



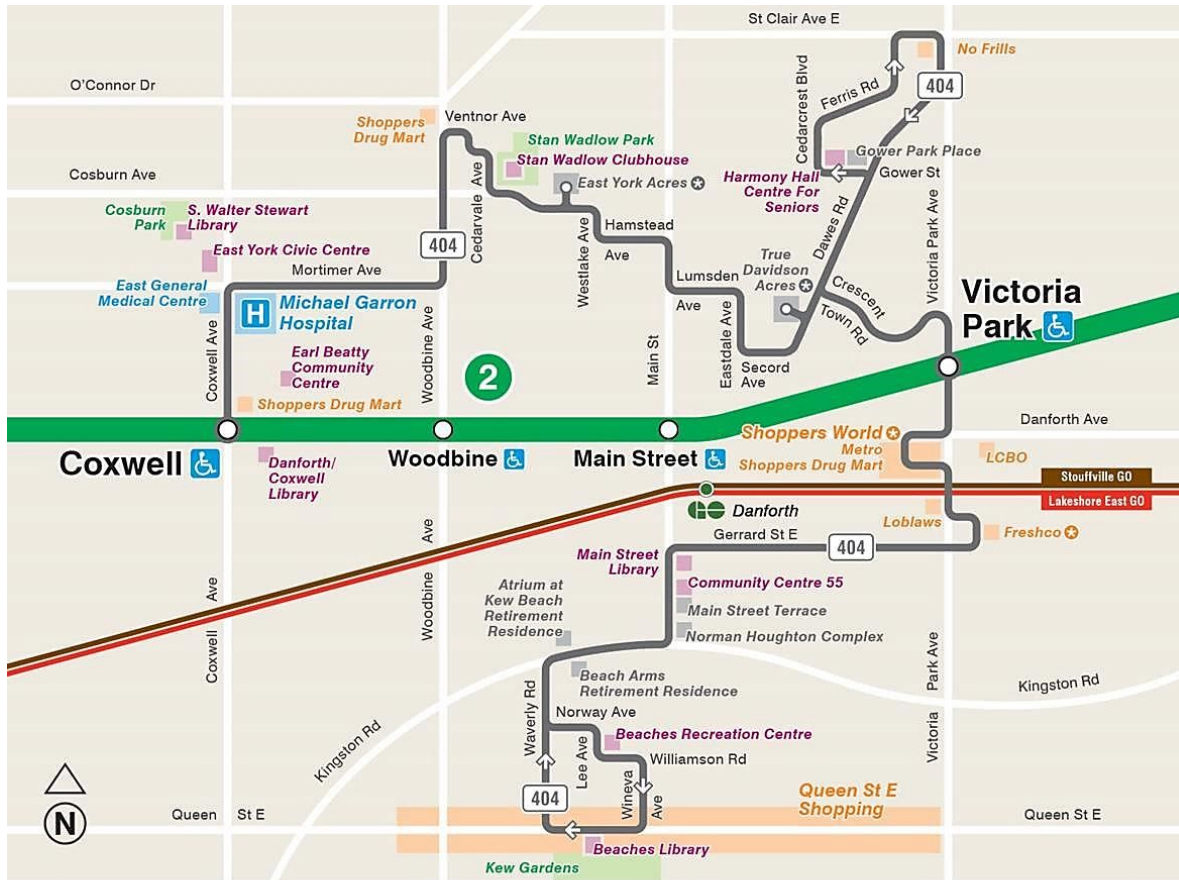
Subway connections

- Yonge-University Line
- Connecting subway station
- Accessible station

Map symbols

- Direction of travel
- Bus stops at front door of these locations
- Hospital
- Health care
- Park
- Recreation
- Seniors' residence
- Shopping

404 East York



Subway connections

- Bloor-Danforth Line
- Connecting subway station
- Accessible station

Map symbols

- Direction of travel
- Bus stops at front door of these locations
- GO station
- Hospital
- Health care
- Park
- Recreation/government
- Seniors' residence
- Shopping