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Item No. 11.1.7

Halifax Regional Council
June 24, 2008

TO: Mayor Kelly and Members of Halifax Regional Council

SUBMITTED BY:

A handwritten signature in cursive script, appearing to read "Dan English".

Dan English, Chief Administrative Officer

A handwritten signature in cursive script, appearing to read "Wayne Anstey".

Wayne Anstey, Deputy Chief Administrative Officer - Operations

DATE: June 18, 2008

SUBJECT: Metro Transit Strategic Plan Update - Terms of Reference

ORIGIN

Approved 2008-2009 HRM Capital Budget.

RECOMMENDATION

It is recommended that Halifax Regional Council approve, in principle, the Terms of Reference for the Metro Transit Strategic Plan Update.

BACKGROUND

In June 2002, the *Metro Transit Strategy* was completed by the consulting firm IBI Group. This plan has since provided direction to Metro Transit with respect to short/medium term planning and service delivery. The intended duration of this plan was five years. While the base concepts and standards in the plan remain sound, it is now due to be reviewed, updated and expanded, to ensure continued relevance and applicability.

DISCUSSION

The Terms of Reference is the first step toward retaining a consulting team to undertake this project. It will form the basis for the Request for Proposals document that is ultimately issued by HRM Procurement to solicit potential consulting teams. Throughout the execution of this project, the Terms of Reference will provide overall direction to the project team (both staff and consultant), leading to a successful completion of the project.

This Strategic Plan Update will integrate existing transit planning documents, future planned services and existing services, aligning Metro Transit planning and service delivery with other relevant plans. Previous transit planning documents have provided high-level guidance on future transit priorities, recommending “What type of service should be provided?” This Strategic Plan Update will tie those high-level ideas together, forming a cohesive implementation strategy, recommending “How should the service be provided”? The question of how to deliver service is particularly relevant given the increased demand for transit outside of Metro Transit’s traditional service area.

As part of the project guidance for this Strategic Plan Update, the intention is to form a cross-functional Project Steering Committee. The composition and selection of this committee will be determined at a later time prior to commencement of the project.

BUDGET IMPLICATIONS

The budget to undertake this project in account CMU01095 was approved by Halifax Regional Council in the 2008-2009 Capital Budget.

FINANCIAL MANAGEMENT POLICIES / BUSINESS PLAN

This report complies with the Municipality’s Multi-Year Financial Strategy, the approved Operating, Capital and Reserve budgets, policies and procedures regarding withdrawals from the utilization of Capital and Operating reserves, as well as any relevant legislation.

ALTERNATIVES

Halifax Regional Council may choose not to approve the recommendation in this report and direct staff to consider changes to the Terms of Reference.

ATTACHMENTS

The Terms of Reference for the Metro Transit Strategic Plan Update are attached as Appendix A.

A copy of this report can be obtained online at <http://www.halifax.ca/council/agendasc/cagenda.html> then choose the appropriate meeting date, or by contacting the Office of the Municipal Clerk at 490-4210, or Fax 490-4208.

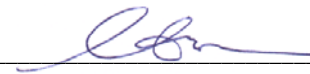
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Appendix A

Metro Transit Strategic Plan Update Terms of Reference

Introduction

Metro Transit, a department of Halifax Regional Municipality within Transportation and Public Works Services, is seeking to develop a five-year strategic plan update. This plan will build on the previous five-year strategic plan completed in June 2002, and will establish operational direction to Metro Transit for the next five years.

The overall goal of this plan is to ensure that Metro Transit is a customer responsive and efficient medium-sized transit system, while continuing to operate in a fiscally responsible manner.

The strategic plan will ensure that Metro Transit service, and the processes which guide the planning and operation of the service, are fair, equitable, and transparent to the citizens of HRM.

Where suitable, the plan will incorporate best practices from other Canadian transit systems (and beyond Canada where appropriate).

A Threat Risk Assessment and Security Plan for Metro Transit is currently underway and will soon be complete. All recommendations from this plan must coincide with the findings of that study.

Metro Transit has experienced unprecedented ridership growth. While Metro Transit desires to encourage future ridership growth, this plan will provide the means to accommodate such growth in a manageable, predictable way.

1. Service Standards

Review Existing Standards – Determine continued validity of current standards, including previous route classification system. Review necessary changes to standards depending on significant changes to route network structure. Add service standards for service types not in existence when current standards were developed.

Density Based Service Standards – Review standards to determine appropriate levels of service based on residential and/or employment population density, including minimum density standards for the implementation of service.

Service Review Triggers – What are the “triggers” that prompt a review of service performance, both in terms of a route that may require additional service or a route that is underperforming.

Scheduling Standards – Review standards for schedule adherence. Develop a standard for building recovery time into schedules.

Customer Service Standards – Standards for schedule adherence, time allowed for transfer connections, customer comfort on vehicles and at terminals, service quality and customer satisfaction.

Hierarchy of High-Order Service – Define BRT and Express services, including express services in both the urban and rural areas. Develop thresholds (projected trips, nature of area, population density, and existing services etc) for each service type.

Access-a-bus Standards – Review standards and eligibility criteria to ensure they reflect the increased availability of Accessible Low Floor (ALF) service.

Stand-by Ratio – Determine what ratio of in-service buses to stand-by buses is appropriate to maintain customer service standards?

Service Deviation/Addition – Define the thresholds at which service is deviated to service a new area (net convenience/inconvenience of the deviation). Define the threshold at which a new service is implemented rather than a service deviation.

2. Fleet Strategy

Vehicle Type – What is the correct vehicle size/type mix for our service? What can be done to manage and coordinate a fleet with various sizes/types of vehicles?

On-Road Fleet Service – Determine what ratio of in-service buses to mobile fleet repair units is appropriate to ensure that on-road breakdowns are addressed in a timely manner to maintain customer service standards.

Fleet Expansion/Replacement Strategy – Number and type of buses to be purchase over life of the plan. Include both expansion and replacement vehicles. For fleet replacement, focus on replacing seats rather than buses.

New Fleet Technology – Review implications and overall benefits/negative effects of new propulsion technology, including hybrids and other alternative fuels.

Fleet Metrics – Review and recommend appropriate values for average annual kilometres per bus, fuel consumption, spare ratio, etc.

Performance Measures – Recommend targets for meeting quota, spare ratios, on-street breakdowns based on industry best practice.

3. Infrastructure and Technology

Terminals – Review of existing and future terminals, including locations and capacities. Prioritize implementations of new terminals.

Park and Ride Strategy – Review current and future Park and Ride needs and capacities. Explore

cost and revenue implications of park and ride lots, including free versus user-pay lots.

Farebox Technology – Review a logical evolution of farebox technology, with the goal of moving to a smart card system.

Shelter Warrants – Develop warrants for the installation of new shelters. Factors could include passenger counts, service levels, and environmental/demographic considerations).

Data Collection – Develop a high-level plan to implement a ridership monitoring program using Automatic Passenger Counter (APC) technology and appropriate software modules to process data from the APCs.

Bus Stop Definitions – Recommend definitions and appropriate infrastructure for bus stops based on type, such as urban, suburban, BRT, rural etc.

Service Exemptions at Bus Stops – Define standards for service exemptions based on traffic volume, vehicle manoeuvring, passenger counts etc...

Accessible Infrastructure Funding – Explore alternative funding mechanisms for the implementation of infrastructure related to accessibility.

Transit Priority Measures – Locations and technology options, including actuation options for the non-MetroLink fleet.

Bus Staging – Review of existing layover/stacking/holding areas, and recommendations for improvements or new facilities with respect to capacity and strategic locations.

Green Infrastructure – Examine opportunities for “green” infrastructure, both in new infrastructure and by retro-fitting existing infrastructure.

4. System Review

Route Network Review – Review of overall route network, including suggestions for modifications to existing routes, and/or the implementation of new routes. This will include a review of Accessible Low Floor (ALF) service. As Metro Transit transitions from a “medium” to a “large-medium” transit system, the need for significant shifts in the route network structure are becoming apparent. One such shift is from the current system of many buses operating in the same corridor, to a core-feeder system. In this system, feeder buses serve the outer suburbs and feed suburban transit terminals. A high frequency, high capacity service is then implemented between these suburban terminals and Downtown and/or other major destinations. Examine potential applications of this concept in the system, including the triggers for change and how such changes could be implemented. Recommend vehicle configurations for the various types of service in this concept.

New Service Coordination – Metro Transit currently operates several different types of service. New service types are proposed for implementation in the coming years. There is a need to further prioritize and coordinate the implementation of these services to ensure appropriate resources (capital, operating and staff) are in place when needed, that there are adequate resources to plan and design and maintain these new services, and resources are rationalized where and if possible.

Conventional Ferry Strategy – Review current ferry system and make recommendations for future conventional ferry service changes, requirements for additional ferry vessels, and high-level requirements (capacity etc) for new conventional ferry vessels.

Community Transit Review – Recommend practices for funding, operating and implementation of Community Transit services that are both responsive to Community needs and fiscally responsible.

5. Communications and Public Affairs

Branding – Review costs versus benefits of branding, including implications on overall brand, fleet, scheduling, corporate recognition, operational flexibility etc.

Marketing Strategy – Review current marketing practices and recommend best practices with respect to print materials and other marketing tools. Explore opportunities for community based social marketing. Review timing of new marketing initiatives with respect to available system capacity.

Public Consultation – Public consultation will play a significant role early in this study. Input must be gathered from users and non-users of the transit system as to what Metro Transit does well, and how it could improve. Methods such as surveys (on-board, direct-mail, website) and stakeholder focus groups should form the basis of the public consultation. As the plan progresses, public consultation sessions should be held to present draft concepts and gather further public feedback before the plan is finalized.

Market Analysis – Perform analysis of Metro Transit’s market, including potential untapped segments of the market. Methods for this market analysis will tie in closely to the public consultation process noted above.

6. Ridership and Cost Recovery

Ridership Monitoring – Review current ridership monitoring methods and recommend best practices.

Standards – Recommend targets and standards for ridership and cost recovery.

Fare Strategy – Recommend a fare structure to address current and future planned services. The fare structure should be fair and simple, while allowing Metro Transit to remain fiscally efficient. This should include an examination of U-Pass and E-Pass program options. Also include a plan and schedule for future fare increases and a rationale for times where it may be necessary to stray from the set schedule (early or late increases).

Projections – Provide ridership and revenue growth projections for the duration of the plan.

7. Governance and Financing

Governance Review and Strategy – Topics include Fleet Services – Transit relationship, Strategic Transportation Planning – Transit relationship, operating as a municipal department versus a Transit Commission, how to run transit more efficiently as the system grows from a small to a medium sized property.

Financial Review – Review current transit financing model and make recommendations for a future model that balances the need to be financially responsible and the needs to provide responsive service to HRM residents. The balance of operating and capital cost recovery between the farebox, general tax funds, senior government funding, and area rates should be examined.

8. Transportation Demand Management

Bicycle Route Strategy – Develop implementation plan for bike-accessible services. This plan must account for fleet availability, nature of the route and areas served, scheduling implications, and other related issues.

Integration with Active Transportation – Review opportunities and methods to further integrate Metro Transit services with HRM’s Active Transportation Plan.

Commuter Options Strategy – Review opportunities to implement ideas from HRM’s commuter options strategy.

Bicycle Storage – Provide best practices for innovative, proven bicycle storage methods for use at terminals.

9. Operating Strategy

Vehicle Assignments – Recommend best practices for assigning vehicle types to certain services. Review what types (size) of vehicles are correct for particular corridors or route types.

Operator Shift Selection Process (The “Pick”) – Review current process and make recommendations to streamline the process. With the growth of the number of shifts and operators in recent years, the current pick process is becoming unwieldy and difficult to manage. A new process is needed to increase efficiency.

Operator Training – Undertake a “high-level”, best practices review of bus operator training procedures, including the ratio of trainers to trainees, the need for refresher training, successful course completion ratios etc. The intent of this section is not for the proponent to undertake a detailed review of the training curriculum.

10. Document Review

The successful proponent will review and incorporate information from the following documents where appropriate:

- HRM Municipal Service Systems Manual (Red Book);
- Metro Transit Strategy – June 2002;
- Greater Vancouver Transportation Authority, Transit Service Guidelines – June 2004;
- TCRP Report # 100 – Transit Capacity and Quality Service Manual, 2nd Edition – January 2004;
- HRM Regional Transit Plan – Park & Ride, Express and Rural Transportation Services – November 2007;
- HRM Five-Year Transit Implementation Strategy (Staff Report) – April 2008;

- HRM Public Transit Functional Plan (Draft) – April 2008;
- Metro Transit Threat Risk Assessment and Security Plan (in progress);
- HRM Regional Parking Functional Plan (Draft) – June 2008;
- Bedford/Halifax Fast Ferry Cultivation Study – June 2006;
- MetroLink Final Report – March 2007;
- Rural Transit Planning Guidelines: User's Guide – February 2008;
- Commuter Options Program Workbook (in progress);
- Available HRM Draft Tax Reform Documents;
- Nova Scotia Transit Strategy Guide – March 2008;
- HRM Regional Municipal Planning Strategy – August 2006; and
- HRM Active Transportation Plan – August 2006.