

# Committee of the Whole Meeting Agenda

Tuesday, April 4, 2023, 10:00 a.m.

Council Chambers

Guelph City Hall, 1 Carden Street

Changes to the original agenda are noted with an asterisk "\*".

Committee of the Whole Meetings are live streamed at [guelph.ca/live](https://guelph.ca/live). Members of the public may delegate in person or by electronic participation.

To listen to the meeting over the phone, call 1-416-216-5643 and enter access code 2334 000 9066.

---

## Pages

### 1. Call to Order

#### 1.1 Disclosure of Pecuniary Interest and General Nature Thereof

### 2. Staff Recognitions

#### 2.1 Certified Engineering Technologist (CET) Designation

Samy Mohamad, Construction Contract Administrator

#### 2.2 Leadership Academy Participants - Cohort 2

Paul Allen, Manager, Employee Health, Safety and Wellness

Joe Amaral, Manager, Fleet Services

Christine Chapman, Manager, Economic Development

Ian Ferguson, Program Manager, Sports and Leisure Grounds

Karen Newland, Manager, Finance Client Services and Budget

Amy Rocha, Supervisor, Financial Operations and Court Services

Dawn Owen, Museum Curator

Jennifer Juste, Manager, Transportation Planning

Kelly Beirnes, Supervisor, Water Distribution Programs

Jared Karr, Supervisor, Wastewater Treatment

Beth Godfrey, Supervisor, Administration and Customer Experience

Steve Anderson, Manager, Transportation Engineering

David Gooch, Supervisor, By-law and Security

### **3. Service Area - Governance**

Chair - Mayor Guthrie

### **4. Consent Agenda - Governance**

The following resolutions have been prepared to facilitate Council's consideration of various matters and are suggested for consideration. If Council wishes to address a specific report in isolation of the Consent Agenda, please identify the item. It will be extracted and dealt with separately as part of the Items for Discussion.

#### **4.1 Delegation of Authority By-law Update - 2023-115**

1

##### **Recommendation:**

1. That the revised Delegation of Authority By-law, included as Attachment-1 to the Updated Delegation of Authority and Document Execution By-laws report, dated April 4, 2023, be approved and that the Delegation of Authority By-law Number (2013)-19529 and Execution of Documents By-law Number (2013)-19635 be repealed.

### **5. Service Area Chair and Staff Announcements**

### **6. Service Area - Infrastructure, Development and Enterprise Services**

Chair - Councillor O'Rourke

### **7. Consent Agenda - Infrastructure, Development and Enterprise Services**

The following resolutions have been prepared to facilitate Council's consideration of various matters and are suggested for consideration. If Council wishes to address a specific report in isolation of the Consent Agenda, please identify the item. It will be extracted and dealt with separately as part of the Items for Discussion.

#### **7.1 Water and Wastewater Servicing Master Plan - 2023-99**

43

##### **Recommendation:**

1. That the Water and Wastewater Servicing Master Plan be approved, and that staff be directed to file a Municipal Class Environmental Assessment Notice of Completion.
2. That the financial information from the Water and Wastewater Servicing Master Plan be referred to the City's water and wastewater rate models and long-range financial plans through the multi-year budget process.

**Recommendation:**

1. That the Stormwater Management Master Plan be approved and that staff be directed to file a Municipal Class Environmental Assessment Notice of Completion.
2. That the financial implications from the Stormwater Management Master Plan be referred to the City's multi-year budget process.

**8. Items for Discussion - Infrastructure, Development and Enterprise Services**

The following items have been extracted from Consent Agenda and will be considered separately. These items have been extracted either at the request of a member of Council or because they include a presentation and/or delegations.

**8.1 2022 Water Services Annual Report and Summary Report - 2023-122**

61

**Presentation:**

Nectar Tampacopoulos, General Manager, Environmental Services

Wayne Galliher, Manager, Water Services

Kristin Pressey, Supervisor, Compliance and Performance

**Recommendation:**

1. That Guelph City Council approve the 2022 Water Services' Annual Report and Summary Report.

**9. Service Area Chair and Staff Announcements****10. Service Area - Public Services**

Chair - Councillor Downer

**11. Items for Discussion - Public Services**

The following items have been extracted from Consent Agenda and will be considered separately. These items have been extracted either at the request of a member of Council or because they include a presentation and/or delegations.

**11.1 Transit Fare Strategy - 2023-102**

94

**Presentation:**

Courtney McDonald, Transit Business Services

**Recommendation:**

1. That the Kids Ride Free program (children aged 12 and under) outlined in Attachment 1, Section 6.3.2 to report "Transit Fare Strategy" dated April 4, 2023, be made permanent and that the budget impacts as outlined in report "Transit Fare Strategy" dated April 4, 2023, be included in the 2024-2027 Multi-year Budget.
2. That the Fare Capping Loyalty program, outlined in Attachment 1, Section 6.3.1 to report "Transit Fare Strategy" dated April 4, 2023, be approved and that the budget impacts as outlined in report "Transit Fare Strategy" dated April 4, 2023, be included in the 2024-2027 Multi-year Budget.
3. That staff be delegated the authority to proceed with the remaining initiatives recommended in Attachment 1 to report "Transit Fare Strategy" dated April 4, 2023.

**12. Service Area Chair and Staff Announcements**

**13. Adjournment**

# Staff Report



---

To	<b>Committee of the Whole</b>
Service Area	Corporate Services
Date	Tuesday, April 4, 2023
Subject	<b>Updated Delegation of Authority and Document Execution By-laws</b>

---

## Recommendation

1. That the revised Delegation of Authority By-law, included as Attachment-1 to the Updated Delegation of Authority and Document Execution By-laws report, dated April 4, 2023, be approved and that the Delegation of Authority By-law Number (2013)-19529 and Execution of Documents By-law Number (2013)-19635 be repealed.
- 

## Executive Summary

### Purpose of Report

This report is intended to seek Council's approval of predominantly administrative updates to the Delegation of Authority By-law. The existing Delegation of Authority By-law has become cumbersome to administer. Staff are recommending the approval of a revised by-law, which streamlines existing delegations. The proposed Delegation of Authority By-law does not add net new delegations or delete existing delegations but, instead, combines the Delegation of Authority By-law and Execution of Documents By-law, streamlining the two documents into one to create a more user-friendly document for the public, Council, and staff.

### Key Findings

The following are key findings for consideration with respect to this report:

- This report outlines the opportunities and challenges that led staff to conduct a review of the Delegation of Authority By-law Number (2013)-19529 and the Execution of Documents By-law Number (2013) – 19635.
- Establishing consistency and alignment with the two By-laws is imperative for the City in administering City processes and ensuring appropriate levels of accountability and transparency. The two By-laws were reviewed for consistency and alignment and have been formatted into a single, functional By-law.
- Administrative updates were made to existing delegations of authority to add efficiency or allow for improved operationalization of the delegated authority.
- Where identified by City departments, the revised By-law now includes authorities delegated to staff through various past Council resolutions but not formally captured in the former version of the Delegation of Authority

By-law. This is intended to offer a more complete By-law, which captures the authority delegated by Council.

- Only current delegations of authority that have already been granted previous authority from Council have been included.

## **Strategic Plan Alignment**

This report and the associated recommendations support the Working Together for our Future pillar of the Guelph. Future Ready Strategic Plan. Specifically, a revised and renewed Delegation of Authority By-law contributes to an effective, fiscally responsible and trusted local government with engaged, skilled and collaborative employees. This revised and renewed By-law ensures that City staff have clear direction and delegation of Council authority provided to them in order to support improved front-line customer service and communication. Clear and proper delegation of authority from Council also contributes to the efficiency and effectiveness of Council's time and supports the corporate value of integrity, by ensuring that actions taken under delegated authority are reported publicly and transparently.

## **Financial Implications**

There are no direct financial implications related to the recommendations of this staff report.

---

## **Report**

### **Background**

Subsection 23.1(1) of the Municipal Act, 2001, S.O. 2001, c.25, as amended (the "Act"), provides municipalities with the ability to delegate powers and duties under that or any other Act to individuals or bodies. Subject to certain restrictions, Council may decide which matters require Council's direct attention, which matters require Council's input and direction, and which matters require limited or no direct Council involvement. This provides the municipality with control over the way it administers its own affairs, while ensuring that minor or routine matters are dealt with in the most efficient and effective manner.

Subsection 23.3(1) of the Act sets out the powers that cannot be delegated by a municipal Council, including:

- The power to appoint or remove from office an officer of the municipality whose appointment is required by the Act. These positions include, for example, the City Treasurer, City Clerk, and the Chief Building Official.
- The power to pass a by-law under section 400.1 and Parts VIII, IX, IX.1 and X. These sections and Parts of the Act relate predominantly to taxation.
- The power to incorporate corporations in accordance with section 203.
- The power to adopt an official plan or an amendment to an official plan under the Planning Act.
- The power to pass a zoning by-law under the Planning Act, except as provided under section 39.2 of that Act.
- The powers to pass a by-law under subsections 108(1) and (2) and 110(3), (6) and (7). These sections relate to the passage of by-laws related to small business supports.

- The power to adopt a community improvement plan under section 28 of the Planning Act, if the plan includes provisions that authorize the exercise of any power under subsection 28(6) or (7) of that Act under section 365.1 of the Act.
- The power to adopt or amend the budget of the municipality.
- Any other power or duty that may be prescribed.

Delegation of authority is a common practice and enables municipal Councils to streamline their decision-making by focusing more on their strategic role and less on operational, administrative, and transactional matters. The current version of the Delegation of Authority By-law represents a consolidation, which resulted from a comprehensive review conducted in 2013, following which [By-law Number \(2013\) - 19529](#) was enacted. Additional schedules containing the delegated authority to staff have continued to be added to the current office consolidation.

Subsection 23.1(2) of the Act sets out the following general rules, which apply to a by-law delegating any of a municipality's powers and duties:

- A delegation may be revoked at any time without notice, unless the delegation by-law specifically limits the municipality's power to revoke the delegation.
- A delegation shall not limit the right to revoke the delegation beyond the term of the council that made the delegation.
- A delegation may provide that only the delegate can exercise the delegated power or that both the municipality and the delegate can exercise the power.
- A delegation or deemed delegation of a duty results in the duty being a joint duty of the municipality and the delegate.
- A delegation may be made subject to such conditions and limits that the council of a municipality considers appropriate.
- Where power is delegated, the power is deemed subject to any limits on the power and to any procedural requirements, including conditions, approvals and appeals which apply to the power and any duties related to the power are deemed to be delegated with the power.

A review of the Delegation of Authority By-law to ensure its alignment with strategic and operational requirements, as well as to ensure an efficient and effective government structure, was identified as an opportunity by way of the [KPMG Service Rationalization Review conducted in 2021](#). Beginning in 2020, a review of the City's Delegation of Authority By-law was undertaken, with the goal of making the By-law more user-friendly and providing clarity for Council, staff, and the public. Over time, opportunities and challenges have been identified, which have also led staff to undertake a review. The current By-law has multiple schedules that, at times, lack clarity around which staff group or person the delegation applies to. Staff have reviewed existing delegations in both the Delegation of Authority By-law Number (2013) – 19529 and the Execution of Documents By-law Number (2013) - 19635. Establishing consistency and alignment with the two documents is crucial for the City in not only administering City processes but also ensuring appropriate levels of accountability and transparency are maintained.

Delegation of authority is an opportunity for a municipal Council to streamline municipal decision-making and improve and enhance service delivery. Effective

delegation by-laws establish clear lines of accountability and communication between Council and the delegate. While streamlining decision-making is important, it can be a challenge for municipal Councils to develop delegation by-laws that serve both Council and the delegated person or body effectively.

The proposed revised Delegation of Authority By-law includes accurate language and has been formatted into a functional schedule to improve customer service and readability. It clearly articulates the expectation and limitations/conditions to be exercised for delegation of authority and governing the execution of documents. Delegations of authority that are not part of current practice and have not been granted previous authority from Council were not in-scope for this review.

Attachment 1 – Schedule A – Delegation of Powers and Duties is a consolidation of the various schedules in both the current Delegation of Authority By-Law (2013)-19529 and Execution of Documents By-Law Number (2013)- 19635, it includes a numbered column to reference the current sections of those bylaws. The revised Schedule A - Delegation of Power and Duties will not include the reference column but will include sequential numbering for ease of navigation and reference.

Additional delegations requested by departments will be brought forward to Council in the form of proposed amendments to this revised By-law, and will be implemented by individual departments, in consultation with the City Clerk's Office, the Legal, Realty and Court Services Department, and the Executive Team.

## **Existing Delegations of Authority**

The review revealed that the current Delegation of Authority By-law Number (2013) – 19529 is difficult to understand, inconsistent with other by-laws across the City, and does not reflect current practices and the structure of the organization.

The following concerns were raised during the review of the existing By-law:

- The By-law is long and has many appendixes, making it difficult to navigate.
- The By-law is dispersed over two main documents, being the Delegation of Authority By-law Number (2013) – 19529 and the Execution of Documents By-law Number (2013)- 19635, and several secondary documents.
- The two main documents that make up the current Delegation of Authority By-law are, in some places, contradictory.
- The By-law is overly specific with non-defined aspects falling between the defined categories.
- There is a lack of clarity about who has authority to sign documents and a need for a clear document execution process.
- The By-law does not currently organize the list of delegations in a way that can be easily understood.
- The By-law includes some outdated language and does not reflect current portfolios across the organization.

## **Revised Delegations of Authority**

The proposed changes incorporated in the revised By-law include the following:

- Combined Delegation of Authority By-law and Execution Documents By-law.
- Schedule "A" is in a table format, making it easier to navigate and understand.



- The revised By-law includes accurate legislative references, outlines limitations and reporting requirements articulating the expectation and conditions to be exercised for each authority.
- The table format resembles the same format many other municipalities have chosen to implement their delegations of authority and is divided by department.
- Current schedules from the existing Delegation of Authority By-law that were lengthy and included several parts have been separated for ease of use.
- Administrative updates to existing delegations of authority that add efficiency or allow for improved operationalization of the delegated authority.
- Where identified by City departments, the revised By-law now includes authorities delegated to staff through various past Council resolutions but not formally captured in the former version of the Delegation of Authority By-law.
- Only delegations of authority that are part of current practice and have been granted previous authority from Council have been included.

The efficient management of the City and the need to respond to issues in a timely manner requires the delegation of certain powers and authority to staff while maintaining accountability and transparency. This can be accomplished through the delegation of certain legislative functions. The revised Delegation of Authority By-law clearly articulates the expectations, limitations, reporting and conditions to be exercised for each authority in a new and streamlined format. It will contribute to a more efficient, effective and continued transparent decision-making process that will enable Council to focus on its strategic role.

## **Financial Implications**

There are no direct financial implications related to the recommendations of this staff report. Properly documented and executed delegations of Council's authority can, at times, reduce administrative costs on customers, residents and businesses. Any exercise of delegated authority by staff is contemplated within the context of the City's existing and approved budgets.

## **Consultations**

To promote accountable and transparent municipal governance, guided by simple, open, and transparent decision making, engagement and communication with staff and Council is critical. It is important that staff who have delegated authority are fully aware of their responsibilities. Ensuring effective communication to ensure the process and method are maintained, controlled, monitored, and reported, are key success factors. If approved, staff will be made aware of the revised By-law. Staff from across the organization were involved in consultations and reviewed the revised By-law, and the City's Executive Team reviewed, provided comments and consideration prior to the development of this staff report.

## **Attachments**

Attachment-1 Draft Revised Delegation of Authority By-law

## **Departmental Approval**

Tara Baker, General Manager, Finance/City Treasurer

Christopher Cooper, General Manager, Legal, Realty and Court Services/City Solicitor

**Report Author**

Liz Barber, Board and Committee Coordinator

**This report was approved by:**

Stephen O'Brien  
General Manager, City Clerk's Office/City Clerk  
Corporate Services  
519-822-1260 extension 5644  
[Stephen.Obrien@guelph.ca](mailto:Stephen.Obrien@guelph.ca)

Christopher Cooper  
General Manager, Legal, Realty and Court Services/City Solicitor  
Corporate Services  
519-822-1260 extension 2288  
[Christopher.Cooper@guelph.ca](mailto:Christopher.Cooper@guelph.ca)

**This report was recommended by:**

Trevor Lee  
Deputy Chief Administrative Officer  
Corporate Services  
519-822-1260 extension 2281  
[Trevor.Lee@guelph.ca](mailto:Trevor.Lee@guelph.ca)

# The Corporation of the City of Guelph

## DRAFT By-law Number (2023) – [XXXXXX]

DRAFT: A By-law to delegate certain administrative powers and duties to City staff, to govern the execution of documents, and to repeal By-laws (2013)-19529; (2013)-19559; (2013)-19586; (2013)-19596; (2013)-19618; (2014)-19749; (2014)-19792; (2015)-19879; (2016)-20022; (2017)-20150; (2018)-20258; (2019)-20375; (2019)-20391; (2019)-20412; (2019)-20439; and (2022)-20711.

WHEREAS section 23.1 of the *Municipal Act, 2001*, S.O. 2001, c. 25, as amended (the "Act"), authorizes a municipal council to delegate its powers and duties under the Act or any other Act to a person or body, subject to the rules and restrictions set out in Part II of the Act;

AND WHEREAS clause 224(d) of the Act, as amended, states that it is the role of a municipal council to ensure that administrative practices and procedures are in place to implement the decision of Council;

AND WHEREAS clause 227(a) of the Act provides that it is the role of the officers and employees of the municipality to implement Council's decisions and establish administrative practices and procedures to carry out Council's decisions;

AND WHEREAS the Council of The Corporation of the City of Guelph ("Council") has deemed that certain routine administrative and legislative powers are of a minor nature, and the delegation of these powers would contribute to the efficient management of the City while still adhering to the principles of accountability and transparency;

AND WHEREAS Council has deemed it desirable to set out in a by-law its policies with respect to the execution of documents and to delegate certain administrative powers and duties to City staff;

AND WHEREAS on the twenty-fifth day of February, 2013, Council enacted By-law Number (2013) – 19529 to delegate certain administrative powers and duties to staff;

AND WHEREAS on the thirtieth day of September, 2013, Council enacted By-law Number (2013) – 19635 to govern the execution of documents;

AND WHEREAS Council wishes to repeal By-law Number (2013) – 19529 and By-law Number (2013) – 19635 and replace them with a new by-law;

NOW THEREFORE THE COUNCIL OF THE CORPORATION OF THE CITY OF GUELPH ENACTS AS FOLLOWS:

### Definitions

1. In this By-law,

"Act" means the *Municipal Act, 2001*, S.O. 2001, c. 25, as amended;

"administrative powers" means all actions that may be taken by Council and Committees, individual Members of Council, and all City officers and employees, which are necessary or appropriate for the effective management of the City in the performance of its responsibilities, including the procurement and disposal of goods, services and property for City purposes;

“CAO” means the City’s Chief Administrative Officer appointed by By-law Number (2019) – 20425, as amended from time to time, or any successor position thereof;

“City” means The Corporation of the City of Guelph,

and “Corporation” has a corresponding meaning;

“City Clerk” means the General Manager City Clerk’s Office/City Clerk, whose duties are assigned under subsection 228 (1) of the *Act*, and includes the Deputy Clerk or any Deputy acting under the direction of the City Clerk or any successor position thereof;

“City Solicitor” means the General Manager of Legal, Realty and Court Services/City Solicitor and includes the Deputy City Solicitor or any Associate Solicitor acting under the direction of the City Solicitor or any successor position thereof;

“Council” means the elected Council of The Corporation of the City of Guelph;

“delegation” means duties conferred by Council on City staff, and is inclusive of both powers delegated from Council to City staff and powers granted by Council to City staff;

and “delegated power” has a corresponding meaning;

“Deputy CAO” means Deputy Chief Administrative Officer and those individuals reporting directly to the CAO, who are responsible for the direction and leadership of individual service areas;

“document” means any written instrument whether on paper or in electronic form including, without limiting the foregoing, any contract, agreement, deed, purchase order, memorandum, letter of intent, application, permit, release, waiver or acknowledgement which, when executed, will have or is intended to have the effect of causing the City to be bound in a legally enforceable relationship with any other person, but shall not include:

- i. any cheques, bank drafts, orders for payment of money, promissory notes, acceptances, bills of exchange, debentures and any similar instruments; and
- ii. correspondence, whether by letter or in electronic form, intended to convey information or confirm a position on a matter, but not intended to create a contract or agreement between the City and any other person, whether or not a legally enforceable right or remedy is created thereby;

and “documents” has a corresponding meaning;

“Document Execution Record” means the Document Execution Record required under the Administration section of this By-law;

“execute” means to complete the formalities intended to give effect to a document and may include any one or more of the following formalities as may be required in the circumstances:

- i. signing the document;
- ii. causing the seal of the City to be affixed to the document; and
- iii. causing delivery of the document to be made to the other parties thereto;

“Procurement By-law” means By-law Number (2018) – 20259, as amended; and

“signing officer(s)” has the meaning ascribed to it in section 7 of this By-law.

### **Nature and Scope of the Delegation of Powers and Duties**

2. Council delegates the powers and duties set out in the attached Schedule “A” to those officers, employees, committees or tribunals listed therein and subject to any limitations specified therein.
3. Notwithstanding the foregoing, Council retains the authority to, at any time and without notice, make, reconsider, or revoke any delegation that has been delegated pursuant to this By-law.
4. Any delegation to a Deputy CAO or a General Manager shall be deemed to include the CAO, with the exception of delegations to the City Clerk, the City

Treasurer or the City Solicitor.

5. Unless otherwise noted, where this By-law has assigned a delegation to a Deputy CAO or General Manager, they may further designate an individual to act in their place. This further sub-delegation shall be in writing. In the event of the sudden departure of a delegate, the CAO may designate an individual to act in the delegate's place. This further sub-delegation shall be in writing. Sub-delegations may be time-limited to service temporary absences, or long-term to facilitate corporate workflow. The maintenance of the written sub-delegation is the responsibility of delegator.
6. Where the exercise of a delegated power or duty requires the expenditure of money or subjects the Corporation to a potential financial loss or obligation, funding for the expenditure or provision for the potential loss or obligation must be included in an approved budget or managed in alignment with reserve fund policies under the advisement of the City Treasurer. All relevant requirements of the City's policies, including the Procurement By-law shall be followed as a condition to the exercise of the delegated authority.

### **Appointment of Signing Officers**

7. Subject to the requirements of this By-law and any statute regarding the execution of any particular kind of document, an employee or officer of the City, who at the time of execution of any document holds any of the following offices or positions, is a signing officer of the City and has the authority to execute the document on its behalf:
  - a) the Mayor;
  - b) the CAO;
  - c) the City Solicitor;
  - d) the City Clerk; and
  - e) a Deputy CAO.
8. In addition to the signing officers designated in 7, a document listed in the delegation column of Schedule A of this By-law (routine documents) may be executed by an employee or officer of the City of Guelph who at the time of execution of the particular documents holds any one of the offices or positions set out in the delegate column of Schedule A, and they shall be considered to be signing officers but only for the limited purposes of the documents set out in Schedule A, that they are authorized to sign provided that all other provisions of this By-law are complied with.
9. When any signing officer designated under 7 and 8 is absent for any reason or the office or the position is vacant:
  - i. if there is a By-law which designate a deputy, associate or other acting person as having the authority of the person holding the position or office of the signing officer, such deputy, associate or acting person is authorized to exercise the authority of the signing officer under this By-law; and
  - ii. unless contrary to a By-law as described in clause (i), any employee or officer of the City appointed in writing by the signing officer identified in 7,8 and as stated in under 5, as acting in the position or office of such signing officer during their temporary absence, is authorized to exercise the authority of the signing officer under this By-law.

### **Authority and Manner of Execution**

10. Delegates shall execute documents only where it is authorized by provincial statute, by By-law, or by resolution of Council. This includes the Procurement By-law to the extent that it authorizes purchase orders and contracts for the sale of goods and services.
11. Should there be a contradiction between By-law Number ##### and previous By-laws enacted by the City, By-law Number ##### shall prevail.
12. The following rules shall apply to the execution of documents:
  - i. Unless otherwise required by law or this By-law, a document may be

executed by either the appropriate delegate under Schedule "A" or two (2) signing officers where required.

- i. Documents may be endorsed with the words, "I/We have authority to bind the Corporation, in accordance with Schedule "B" to Bylaw Number (2023)- XXXX (Delegation of Authority By-Law)" or any similar words indicating the authority of the signing officer(s).
- ii. Every signing officer shall ensure that their name and title are legibly printed beneath his or her signature.
- iii. The seal of the City shall not be affixed to a document upon execution unless it is approved by either the City Clerk or the City Solicitor.
- iv. When executing documents digitally the Electronic Signature Policy shall be adhered to.
- v. An individual who is authorized to execute an agreement or contract is also authorized to execute any documents reasonably necessary to carry out the purposes and intent of the agreement or contract or to amend the agreement or contract.

### **Administration**

13.A Document Execution Record shall be completed in respect of each document executed in accordance with this By-law, except for the following documents:

- f) Purchase orders;
- g) Undertakings, certificates, declarations and similar documents, required for the completion of any transaction involving the purchase, sale or exchange of any interest in land other than agreements of purchase and sale, deeds, transfers, leases and agreements to lease;
- h) Forms under the *Land Registration Reform Act*, R.S.O. 1990, c.L.4, as amended, consolidated or replaced from time to time, for the registration of any documents that have already been executed on behalf of the City, in accordance with this By-law;
- i) Facility rental permits for the occupancy of City lands or premises on a short term basis (*i.e.*, duration of less than one year) by others, such as the use of meeting rooms, sports fields, open space, arenas, aquatic facilities, recreation and cultural facilities, civic facilities and road allowance;
- j) Special events permits indicating that the applicant organization/individual has met and complied with all conditions, legislation and by-laws pertaining to their application to hold an event on City owned or City operated property; and
- k) Hiring of performers and artists for single, one time events.

14.The Clerk's Office shall maintain a register of the Document Executions Records.

15.All conditions set out in Schedule "A" must be adhered to.

16.All documents to be executed shall be prepared in a sufficient number of identical originals to permit at least one executed original, which may be executed in counterparts, to be retained by the City, except that if the document provides that electronic signatures or execution in counterparts with exchange by PDF and e-mail are sufficient, an executed original is not required.

17.The initiator of a document(s) shall arrange for the execution of such document(s) by the appropriate signing officers.

18.The City Clerk shall approve the form of the Document Execution Record, prepare and circulate procedures, and ensure that a registry of documents executed is kept for the purposes of this By-law.

19.Following its execution, the fully executed document shall be forwarded to the Office of the City Clerk and the remaining original(s), if any, to the department with primary oversight for the contract or agreement to which the document pertains.

20.The department with primary oversight for the contract or agreement shall be

responsible for distribution of the executed document.

21.The short title of this By-law is the “Delegation of Authority By-law”.

**General**

22.A document executed under authority delegated by this By-law shall first be approved as to content by the CAO, Deputy CAO, the General Manager responsible for the relevant department, or the delegate, as the case may be, and, when required by the delegate, approved as to form by the City Solicitor.

23.Any reference to legislation, regulations, and to by-laws in this By-law shall be interpreted to include all amendments to and any successor legislation thereof.

24.It is the opinion of Council that any of the legislative powers delegated pursuant to this By-law are of a minor nature within the meaning of subsection 23.2(4) of the *Act*.

25.If a court of competent jurisdiction declares any provision, or any part of a provision, of this By-law to be invalid, or to be of no force and effect, it is the intention of Council in enacting this By-law that each and every other provision of this By-law, authorized by law, be applied and enforced in accordance with its terms to the extent possible according to law.

26.Where specified, delegated authority set out in Schedule “A” to this By-law and exercised shall be reported on an annual basis to Council, or a Committee of the Council, by the Deputy CAO described as responsible for the delegated authority.

27.Schedule “A” – “Delegation and Granting of Powers and Duties” attached hereto forms part of this By-law.

**Effective By-law Date**

This By-law comes into force and takes effect on the day upon which it is passed.

**Passed this [.] day of [.], 2023.**

---

**Cam Guthrie, Mayor**

---

**Stephen O’Brien, City Clerk**

**DRAFT Schedule “A” – Delegation of Powers and Duties**  
**Chief Administrative Officer**  
**Table 1: Chief Administrative Officer**



Number	Delegation	Delegate	Limitation
Further to s. 229 of the Municipal Act	Develop, approve, implement, vary, or rescind administrative policies, procedures and practices in the exercise of authority under section 229 of the Act.	CAO; the Deputy CAOs.	
Z, Doc ex 6.15, 2.5, 2.6	Authority to execute, amend or terminate agreements with third parties, that in effect bind the City, for the provision or acquisition of goods and services or other City activities, works or services that are ordinary to the business of all City's service areas but subject to any limitations as set out in City policies established by Council.	CAO; the Deputy CAOs; General Manager of the relevant department.	<p>Any expenditure that is funded through a current year's operating or capital budget, which has been approved by Council.</p> <p>The application, contract and agreement is in compliance with the Procurement By-law.</p> <p>Applications, contracts, and agreements are less than five (5) years in length.</p> <p><b>Reporting:</b></p> <p>Annual Information Report to Council.</p>

Previously delegated	Delegation of authority to exercise certain authority, subject to the restrictions set out in Part II of the Act, in the event Council is in a restricted acts position after nomination day under section 275 of the Act, for the purpose of ensuring that the business of the City can continue.	CAO.	<p>Subject to certain exceptions, Council cannot take any action described in subsection 275(3) of the Act during one or both of two separate time periods:</p> <ul style="list-style-type: none"><li>a) The period from nomination day to election day; and</li><li>b) From election day to the end of the then-current term.</li></ul> <p>This period is technically referred to as the restricted acts period after nomination day and is also occasionally referred to as the “lame duck” period.</p> <p><b>Restrictions:</b></p> <p>Subsection 275(3) of the Act states that, in either of the above situations, the Council of a municipality shall not take any of the following actions:</p> <ul style="list-style-type: none"><li>a) the appointment or removal from office of any officer of the municipality;</li><li>b) the hiring or dismissal of any employee of the municipality;</li><li>c) the disposition of any real or personal property of the municipality which has a value exceeding \$50,000 at the time of disposal; and</li><li>d) making any unbudgeted expenditures or incurring any other liability which exceeds \$50,000.</li></ul>
----------------------	--	------	---

A, Doc ex 6.15, 1.1	<p>Authority to approve the execution, amendment or termination of agreements or grant applications with:</p> <ul style="list-style-type: none"><li>the Government of Ontario;</li><li>the Government of Canada;</li><li>an agency of the Government of Ontario or the Government of Canada; or</li><li>other grantor organizations providing funding to municipalities with respect to funding commitments for City initiatives.</li></ul> <p>This delegation is inclusive of grants, subsidies, and other financial transfers.</p>	CAO; the Deputy CAOs; General Manager, Finance/City Treasurer; General Manager of the relevant department.	<p>The grant must relate to a City activity, program or initiative, funded through a current year's operating or capital budget, which has been approved by Council.</p> <p>Applications may be made for grants not identified as a source by Council so long as the grant will not require additional expenses not already approved by Council.</p> <p><b>Reporting:</b></p> <p>Reporting to Council will be done in accordance with the City's grant application processes.</p>
---------------------	--	--	---

Table 2: Strategy, Innovation and Intergovernmental Services

Number	Delegation	Delegate	Limitation
Current practice	Authority to provide commentary, feedback, and information to provincial and federal governments with regard to legislative/regulatory changes and administrative policies and procedures.	General Manager, Strategy, Innovation, and Intergovernmental Services.	<p><b>Reporting:</b></p> <p>Regular routine reporting through weekly Information Items.</p>

Corporate Services

Table 3: Corporate Services

Number	Delegation	Delegate	Limitation
Doc ex 6.14	Authority to execute, amend or terminate agreements for the loan by the City from another party of equipment or other goods.	Deputy CAO of Corporate Services; General Manager, City Clerk's Office / City Clerk; General Manager, Legal, Realty and Court Services / City Solicitor; General Manager, Human Resources; General Manager, Information Technology.	The associated expenditure is in compliance with the Procurement By-law.

Table 4: City Clerk's Office

Number	Delegation	Delegate	Limitation
CC, Doc ex 6.12	To delegate the City Clerk as the “head” for the purposes of the Municipal Freedom of Information and Protection of Privacy Act, as amended (“MFIPPA”). Pursuant to subsection 3(1) of MFIPPA.	General Manager, City Clerk’s Office /City Clerk	Exercise of authority pursuant to MFIPPA and in compliance with all requirements of both the Personal Health Information Protection Act, 2004, as amended, and the Purchasing By-law.  <b>Review:</b>  Decisions of the “head” are appealable to the Information and Privacy Commissioner of Ontario.  <b>Reporting:</b>  Annual information report is made to the Information and Privacy Commissioner, and to Council by way of the City Clerk’s Office.
M	Authority to approve Community Festivals and Special Occasions as required by the Alcohol and Gaming Commission of Ontario (AGCO) to permit the sale and service of beverage alcohol at such events.	CAO; General Manager, City Clerk’s Office /City Clerk or a person whom the General Manager, City Clerk’s Office/City Clerk has delegated this power under subsection 228(2) and/or (4) of the Act.	Applicants must adhere to relevant City policies and meet all insurance and risk management requirements requested by City staff.  Applicants must submit a drawing clearly indicating the proposed permit area.  <b>Review:</b>  Where an application has been denied, the applicant may request that the decision be reviewed by Council.  <b>Reporting:</b>  Annual Information Report to Council.
Previously delegated by Council	Authority to act as the head of the municipality under the Ombudsman Act, as amended, and implement policies and procedures necessary to allow for the appropriate tracking and reporting of interactions between the City of Guelph and the Ombudsman’s Office.	General Manager, City Clerk’s Office /City Clerk or a person whom the General Manager, City Clerk’s Office/City Clerk has delegated this power under subsection 228(2) and/or (4) of the Act.	All reporting and interactions between the City and the Ombudsman’s Office will be done in a way that maintains the confidentiality of complainants while contributing to additional transparency in respect of these interactions.  <b>Reporting:</b>  Annual Information Report to Council.

Number	Delegation	Delegate	Limitation
Previously delegated by Council	Authority to select and appoint members to the Joint Municipal Election Compliance Audit Committee (MECAC) and review and revise the Terms of Reference throughout the term of the Committee in accordance and in consultation with other participating municipalities.	General Manager, City Clerk's Office / City Clerk or a person whom the City Clerk has delegated this power under subsection 228(2) and/or (4) of the Act.	<p>Section 88.37 of the <i>Municipal Elections Act, 1996</i>, as amended, requires that a Council or local board shall establish a Municipal Election Compliance Audit Committee before October 1 of an election year.</p> <p><b>Reporting:</b></p> <p>Information Report to Council following the selection and appointments of Committee members.</p>
E, Doc ex 4.1	<p>Authority to approve and execute, agreements, amendments or termination of agreements, pursuant to any condition of approval by the Committee of Adjustment under the Planning Act, as amended, in connection with the development of land, where the City is not the applicant, including, but not limited to:</p> <ul style="list-style-type: none"> <li>• Section 45, minor variances; and</li> <li>• Section 53, consents</li> </ul> <p>Authority to approve and execute any acknowledgments of compliance pursuant to any such agreement.</p>	General Manager, City Clerk's Office / City Clerk.	<p>Any conditions prescribed by the Committee of Adjustment must be included in agreements executed under this delegation.</p> <p><b>Reporting:</b></p> <p>Annual Information Report to Council on agreements signed under this delegation.</p>

**Table 5: Finance**

Number	Delegation	Delegate	Limitation
P	Authority to approve the tax apportionments, write-offs and increases under sections 356,357, 358 and 359 of the Act.	CAO; General Manager, Finance/City Treasurer; Deputy City Treasurer/ Manager of Taxation and Revenue.  The Assessment Review Board for the purpose of applications under section 357(1)(d.1) of the Act.	All write-offs have been reviewed and approved by MPAC.  Allowances for write-offs are within the total amount approved for net supplementary and write-off taxation revenue as part of the annual operating budget.  <b>Review:</b>  Applicants have 35 days within which to appeal any section 357 decisions to the Assessment Review Board (ARB).  Section 358 decisions are final.  <b>Reporting:</b>  Annual Information Report to Council.
HH	Authority to represent, negotiate settlement agreements and legally bind the City in relation to appeals before the ARB.	Assessment Review Officer; Manager, Taxation and Revenue; Corporate Analyst-Property Assessment; a Legal Representative.	All appeals are subject to the Assessment Review Board (ARB)Rules of Practice and Procedure.  Allowance for appeal write-offs must be within the total amount approved for net supplemental taxes and write-offs as part of the annual operating budget.  <b>Reporting:</b>  Annual Information Report to Council.
II	Authority to vest in property after a failed tax sale.	General Manager, Finance/ City Treasurer; Manager, Taxation and Revenue.	Must conform to the Act and associated regulations.  <b>Reporting:</b>  Information Report at the time a property is vested or is recommended not to be vested in pursuant to this delegation of authority.

Number	Delegation	Delegate	Limitation
KK	<p>Authority to sign any document related to collection of property taxes and property assessment-related issues, including, but not limited to:</p> <ul style="list-style-type: none"> <li>• Tax Certificate;</li> <li>• Tax Arrears Certificate;</li> <li>• Notice of Registration;</li> <li>• Statutory Declaration;</li> <li>• Final Notice;</li> <li>• Tax Arrears Cancellation Certificate;</li> <li>• Extension Agreements;</li> <li>• Tax Deed;</li> <li>• Notice of Vesting;</li> <li>• Statement of Compliance;</li> <li>• Payment into Court;</li> <li>• Notice of Forfeiture;</li> <li>• Bailiff Warrant to Distrain for Taxes;</li> <li>• Bailiff Notice of Seizure;</li> <li>• Bailiff Notice of Attornment of Rent;</li> <li>• Municipal Property Assessment Corporation documents; Minutes of Settlement; and</li> <li>• ARB documents.</li> </ul>	<p>General Manager, Finance/ City Treasurer; Manager, Taxation and Revenue; Supervisor, Property Tax, Corporate Analyst - Property Assessment.</p>	<p><b>Budget restrictions:</b></p> <p>Allowance for appeal write-offs must be within the total amount approved for net supplemental taxes and write-offs as part of the annual operating budget.</p>
EE	<p>Authority to approve successful bids where the procurement of the goods or services is budgeted but does not have specific Council approval.</p>	<p>General Manager, Finance /City Treasurer and the Deputy CAO of the relevant service area.</p>	<p>Successful bids approved must meet all conditions of the Procurement By-law.</p> <p><b>Reporting:</b></p> <p>Annual Information Report to Council.</p>
JJ	<p>To initiate and file an appeal, or withdraw an appeal, with the ARB or any appropriate application made under the Act and related to property taxation/assessment on any property in the City of Guelph.</p>	<p>General Manager, Finance/ City Treasurer; Manager Taxation and Revenue.</p>	<p>The delegate must adhere to the requirements of the Act and the Assessment Act.</p> <p><b>Reporting:</b></p> <p>Assessment appeals filed by the annual deadline will be reported by way of an information report on an annual basis. All other appeals filed and/or increases sought will be reported through the annual information report pursuant to this delegation of authority.</p>

Number	Delegation	Delegate	Limitation
JJ	To initiate and file a Request for Reconsideration or any application made under the Act and related to property taxation/assessment, or file an appeal with the ARB on any property to which the City has a legal interest.	General Manager, Finance/ City Treasurer, Manager, Taxation and Revenue.	<p>The delegate must adhere to the requirements of the Act and the Assessment Act.</p> <p><b>Reporting:</b></p> <p>Assessment appeals filed by the annual deadline will be reported by way of an information report on an annual basis. All other appeals filed and/or increases sought will be reported through the annual information report pursuant to this delegation of authority.</p>
JJ	To seek an increase in assessment or a classification change on any ARB appeal filed within the City of Guelph.	General Manager, Finance/ City Treasurer; Manager, Taxation and Revenue.	<p>The delegate must adhere to the requirements of the Act and the Assessment Act.</p> <p><b>Reporting:</b></p> <p>Appeals filed and/or increases sought will be reported through the annual information report pursuant to this delegation of authority.</p>
JJ	To object to minutes of settlement resulting from a request for reconsideration, and to file an appeal with the ARB.	General Manager, Finance/City Treasurer; Manager of Taxation and Revenue.	<p>The delegate must adhere to the requirements of the Act and the Assessment Act.</p> <p><b>Reporting:</b></p> <p>Appeals filed and/or increases sought will be reported through the annual information report pursuant to this delegation of authority.</p>
JJ	To withdraw any appeal filed by the City, should it be determined it is in the best interests of the City to not proceed.	General Manager, Finance/ City Treasurer; Manager of Taxation and Revenue.	<p>The delegate must adhere to the requirements of the <i>Act</i> and the <i>Assessment Act</i>.</p> <p><b>Reporting:</b></p> <p>Assessment appeals filed by the annual deadline will be reported by way of an information report on an annual basis. All other appeals filed and/or increases sought will be reported through the annual information report pursuant to this delegation of authority.</p>
Doc ex 6.9	Authority to execute, amend and submit proof of loss, both interim and final, to the City's insurer.	General Manager, Finance/City Treasurer, or General Manager of the department from which the claim originates.	



Number	Delegation	Delegate	Limitation
Doc ex 6.8	Authority to execute agreements with banking and financial institutions that are necessary and incidental to Agreements.	General Manager, Finance/City Treasurer.	

**Table 6: Human Resources**

Number	Delegation	Delegate	Limitation
Doc ex 5.1	Execute, amend or terminate contracts of employment.	General Manager, Human Resources.	<p>This delegation does not include collective agreements and amendments to them.</p> <p>The execution, amendment or termination of contracts associated with the employment of the CAO are the responsibility of Council and shall be actioned by By-law. Administrative support in this regard may be supported by the General Manager of Human Resources.</p>
Doc ex 5.2	Execute, amend or terminate personnel and student placement agreements, secondment agreements and other documents in respect of persons being placed with the City or employees of the City being placed with other organizations.	General Manager, Human Resources.	<p>This delegation does not include collective agreements and amendments to them.</p>

**Table 7: Information Technology**

Number	Delegation	Delegate	Limitation
B, Doc ex 6.13	Authority to approve the execution, amendment or termination of software licensing agreements.	General Manager, Information Technology.	<p>The software is funded through a current year’s operating or capital budget, which has been approved by Council.</p> <p>The associated expenditure is in compliance with the Procurement By-law.</p> <p><b>Reporting:</b></p> <p>Annual Information Report to Council on agreements executed under this delegation.</p>

Number	Delegation	Delegate	Limitation
C/D Doc ex 6.4	Authority to approve the execution, amendment or termination of agreements regarding the storage, procurement, sharing, or confidentiality of data or intellectual property.	Deputy CAOs; General Manager, Information Technology.	Any expenditures are funded through a current year’s operating or capital budget, which has been approved by Council.  The associated expenditure is in compliance with the Procurement By-law.  <b>Reporting:</b>  Annual Information Report to Council on agreements executed under this delegation.
Doc ex 2.6	Agreements, applications for permits and other documents for the installation of fibre optic telecommunications lines associated with the Public Sector Network either over or under provincial highways or railways in Ontario.	General Manager, Information Technology.	<b>Reporting:</b>  Annual information Report to Council on agreements and applications executed under this delegation.

**Legal, Realty and Court Services**

The General Manager, Legal, Realty and Court Services/City Solicitor shall be responsible for providing legal advice to Council and for the legal affairs of the Corporation as conferred by By-law or as assigned by Council or the CAO, including representing the City in actions and other legal proceedings. This service shall be provided with meaningful consultation with the delegate responsible for the program, operation or project to which the matter relates.

**Reporting:**

Annual Information Report to Council on the exercise of authority by the General Manager. Legal, Realty and Court Services/City Solicitor. The General Manager, Legal, Realty and Court Services/City Solicitor shall also report to Council on all outstanding actions or legal proceedings involving the City. This Litigation Status Report shall include a description of the settlement of any legal proceeding during the period following the last report.

**Table 8: Legal, Realty and Court Services**

Number	Delegation	Delegate	Limitation
AA 5	Execute any agreement or other legal document on behalf of the City that is necessary to carry out the City Solicitor’s powers.	General Manager, Legal, Realty and Court Services /City Solicitor.	
AA 3(a)	Authority to commence any legal proceeding or step in a legal proceeding.	General Manager, Legal, Realty and Court Services /City Solicitor.	Claims of \$100,000 or less, excluding interest and costs.

Number	Delegation	Delegate	Limitation
AA 3(b)	Authority to commence any legal proceeding on behalf of the City to ensure that no limitation period or other time restriction expires before instructions of Council can be obtained.	General Manager, Legal, Realty and Court Services /City Solicitor.	Instructions of Council are sought as soon as practicable thereafter for claims over \$100,000, excluding interest and costs.
AA 3(c) 3(2)	Authority to take all necessary steps to defend any legal proceeding commenced against the City.	General Manager, Legal, Realty and Court Services /City Solicitor.	Instructions of Council are sought as soon as practicable thereafter for claims over \$100,000, excluding interest and costs.
AA 3(d)	Authority to commence any counterclaim, crossclaim or third-party claim as part of the City's defence to any legal proceeding.	General Manager, Legal, Realty and Court Services /City Solicitor.	Claims of \$100,000 or less, excluding interest and costs.
AA 3(e2)	Authority to bring applications and post security for the removal of liens registered against City lands.	General Manager, Legal, Realty and Court Services /City Solicitor.	Expenditures of \$100,000 or less.
AA 3(f)	Retain any expert or other person to assist in an actual or potential action or other legal proceeding, or the acquisition or disposition of land.	General Manager, Legal, Realty and Court Services /City Solicitor.	With approval by the applicable Deputy CAO or General Manager up to \$100,000.
AA 3(g)	Accept service of any legal document on behalf of the City.	General Manager, Legal, Realty and Court Services /City Solicitor.	
AA 3(h)	Obtain intervenor status or non-party standing in order to participate in any administrative proceeding on behalf of the City.	General Manager, Legal, Realty and Court Services /City Solicitor.	Instructions of Council are sought as soon as practicable thereafter.
AA 3(i)	Take all necessary steps to protect or pursue the rights of the City in its capacity as landlord or tenant.	General Manager, Legal, Realty and Court Services /City Solicitor.	Claims of \$100,000 or less and claims over \$100,000 with the approval of Council.

Number	Delegation	Delegate	Limitation
AA 3(j) Doc ex 6.10, 6.11	Negotiate resolutions and execute the necessary documentation including consents, settlement agreements and releases in any existing anticipated claim, demand, action or other proceedings brought or made against the City, or those local boards or other persons for whom the City is responsible, where the value of the proceeds or settlement or the City's contribution to the settlement does not exceed \$100,000. Where the City's contribution to the settlement exceeds \$100,000, with approval of Council.	General Manager, Legal, Realty and Court Services /City Solicitor.	Claims of \$100,000 or less and claims over \$100,000 with the approval of Council.
AA 3(k)	Negotiate resolutions and execute the necessary documentation including consents, settlement agreements and releases in any existing or anticipated claim, demand, action or other proceedings brought or made against the City, or those local boards or other persons for whom the City is responsible, where the matter is covered by an insurance policy that indemnifies the City, its officers, employees, agents, contractors or volunteers, the value of the City's contribution to the settlement is not greater than the deductible amount set out in the subject policy.		Where the City's contribution to the settlement exceeds the deductible amount set out in the subject policy, with the approval of Council.
AA 6(a)	Determine whether the City shall attend a hearing of an appeal of a Committee of Adjustment decision to the OLT and the position of the City.	General Manager, Legal, Realty and Court Services /City Solicitor.	Decisions shall be made in consultation with the General Manager of Planning and Building Services.

Number	Delegation	Delegate	Limitation
AA 6(b)	Appeal a Committee of Adjustment decision to the OLT and take all necessary steps in the best interests of the City.	General Manager, Legal, Realty and Court Services /City Solicitor.	Where a time restriction would expire before instructions of Council could be obtained, provided instructions are obtained as soon as practicable thereafter, and the City Solicitor is of the opinion (in consultation with the General Manager of Planning and Building Services) that the decision of the Committee of Adjustment is contrary to the best interests of the City.
AA 6(c)	Negotiate resolutions and execute the necessary documentation including consents, settlement agreements and releases where an appeal from a decision of the Committee of Adjustment has been filed with the OLT, and take all necessary steps in the best interests of the City.	General Manager, Legal, Realty and Court Services /City Solicitor.	Where the City Solicitor (in consultation, with the General Manager of Planning and Building Services) is of the opinion that it is in the best interests of the City to enter into the settlement agreement.
AA 7(a)	Execute any document in accordance with the Land Registration Reform Act, as amended, as required to permit registration of such document under the Land Titles Act, as amended, or the Registry Act, as amended, as applicable, for any action otherwise approved.	General Manager, Legal, Realty and Court Services /City Solicitor.	
AA 7(b)	Register any instrument on behalf of the City against the title to the lands in which the City has interest.	General Manager, Legal, Realty and Court Services /City Solicitor.	
AA 7(c)	Execute and register all applications on behalf of the City for entry or removal of a notice or caution of any kind, an inhibiting order, reference plan or similar registration of any kind in the Land Registry Office.	General Manager, Legal, Realty and Court Services /City Solicitor.	

Number	Delegation	Delegate	Limitation
AA 7(d)	Approve and execute agreements permitting the City or its contractors to enter upon land for any of the purposes of the City or permitting others to enter onto City-owned lands for municipal, utility or other purposes, provided that the estimate of the cost of the obligations to be incurred by the City is part of an approved budget or does not exceed \$50,000.	General Manager, Legal, Realty and Court Services /City Solicitor.	Subject to the specific authority, as set out in this By-law, to execute, amend or terminate agreements and other documents permitting underground pipe crossings of lands used for gas lines or railway purposes, limited access highways, or hydro corridors.
AA 7(e)	Approve and execute undertakings, certificates, declarations and any other documents required for the completion of any transaction involving the purchase, sale or exchange of any interest in land, including any documents required to be delivered under the applicable agreement of purchase and sale.	General Manager, Legal, Realty and Court Services /City Solicitor.	
AA 7(f)	Approve and execute agreements to extend the closing date of purchase and sale transactions.	General Manager, Legal, Realty and Court Services /City Solicitor.	
AA 7(g)	Approve and execute agreements of purchase and sale and all transfers for the purchase or exchange of any interest in land, including easements, for: (a) any approved capital project; or (b) any requirement under a condition of approval imposed in connection with any application under the Planning Act, as amended; (c) provided that, in the case of an exchange of any interest in land, the transfer of the interest in land on the part of the City is completed in accordance with the Policy for the Sale and Disposition of Real Property Interests.	General Manager, Legal, Realty and Court Services /City Solicitor in consultation with the City's Strategic Property Committee.	
AA 7(h)	Approve and execute documents permitting encroachments onto easements and other City-owned land, including land that is a public highway, and including encroachment agreements.	General Manager, Legal, Realty and Court Services /City Solicitor.	

Number	Delegation	Delegate	Limitation
AA 7(i)	Subject to compliance with the Policy for the Sale and Disposition of Real Property Interests, approve and execute agreements to lease/licence and leases/licences of land required for City purposes and any related notice of lease, including leases having a term in excess of 21 years and including the assignment and sub- leasing/sub-licensing of existing agreements, provided that: (a) the total consideration or a reasonable estimate of the cost of the obligations to be incurred by the City does not exceed \$100,000; and (b) the consideration or cost does not exceed the Council-approved budget for the affected department.	General Manager, Legal, Realty and Court Services /City Solicitor in consultation with the City's Strategic Property Committee.	
AA 7(j)	Subject to compliance with the Policy for the Sale and Disposition of Real Property Interests, approve and execute agreements for the sale of City-owned land, easements over City-owned land, or the purchase of land, provided that total consideration or a reasonable estimate of the cost of the obligation is supported by an appraisal and does not exceed \$100,000.	General Manager, Legal, Realty and Court Services /City Solicitor.	
"AA" 8	Authority to manage all insured claims, both self- and third-party insured, except those which are the subject of litigation.	General Manager, Legal, Realty and Court Services /City Solicitor.	Claims of \$100,000 or less, excluding costs and interest and those that are not subject to litigation.
"AA" 8	Authority to settle all insured claims, both self- and third-party insured, where the value of the City's contribution to the settlement is not greater than the deductible amount set out in the subject policy.	General Manager, Legal, Realty and Court Services /City Solicitor.	Claims of \$100,000 or less, excluding costs and interest and those that are not subject to litigation.
AA 5	Execute any agreement or other legal document on behalf of the City that is necessary to carry out the powers of the General Manager of Court Services.	General Manager, Legal, Realty and Court Services /City Solicitor.	
AA 9(a)	Commence any prosecution with respect to Provincial Offences Act ("POA") Court matters in order to carry out the City's function as the prosecutorial authority.	General Manager, Legal, Realty and Court Services /City Solicitor.	

Number	Delegation	Delegate	Limitation
AA 9(b)	Commence any action or legal proceedings in order to carry out the City’s function to enforce court-ordered sentences of POA Court matters.	General Manager, Legal, Realty and Court Services /City Solicitor.	
AA 9(c)	Retain or contract with any prosecutor or other person or organization to assist in carrying out the functions in the Prosecutions Section.	General Manager, Legal, Realty and Court Services /City Solicitor.	Any associated expenditure is funded through a current year’s Court Services-approved City budget.
AA 9(d)	Accept service on behalf of the City of any legal document associated with POA Court operations.	General Manager, Legal, Realty and Court Services /City Solicitor.	
AA 9(e)	Enter into joint procurement initiatives with other municipalities operating courts in Ontario for goods and services with respect to POA Court operations.	General Manager, Legal, Realty and Court Services /City Solicitor.	

**Infrastructure, Development and Enterprise Services**

**Table 9: Infrastructure, Development and Enterprise Services**

Number	Delegation	Delegate	Limitation
Doc ex 6.14	Authority to execute, amend or terminate agreements for the loan by the City from another party of equipment or other goods.	Deputy CAO, Infrastructure, Development and Enterprise Services; General Manager, Economic Development and Tourism; General Manager, Environmental Services; General Manager, Planning and Building Services; General Manager, Facilities and Energy Management.	The associated expenditure is in compliance with the Procurement By-law.



Number	Delegation	Delegate	Limitation
S	Authority to award Environmental Study Grants pursuant to the Brownfield Redevelopment Community Improvement Plan.	Deputy CAO, Infrastructure, Development and Enterprise Services; General Manager, Planning and Building Services.	<p>Grants shall be awarded to support City programs funded through a current year’s annual capital budget, where the maximum budget for CIP grant will also be set.</p> <p>The associated expenditure is in compliance with the Procurement By-law.</p> <p>This delegation does not supersede any approvals required under section 28 of the <i>Planning Act</i>, as amended, such as adoption of the CIP or major amendments to the CIP.</p> <p>All grant applications are reviewed by Planning Services and Engineering Services staff, who may consult with other appropriate City staff as necessary.</p> <p>Where an application is made by an applicant who is responsible for polluting the subject property, the authority rests with Council rather than City Staff</p> <p><b>Reporting:</b></p> <p>Annual Information Report to Council.</p>
Doc ex 2.4	Authority to execute, amend or terminate agreements and other documents permitting underground pipe crossings of lands used for gas lines or railway purposes, limited access highways, or hydro corridors.	Deputy CAO, Infrastructure, Development and Enterprise Services; General Manager, Engineering and Transportation Services/City Engineer; General Manager, Operations.	<p>The total consideration to be paid or a reasonable estimate of the cost of the obligations to be incurred by the City, excluding applicable taxes, legal fees and fees of an administrative nature, does not exceed \$100,000.</p> <p>Consultation with the General Manager of Guelph Junction Railway Limited (“GJR”) where the subject agreements and other documents touch upon GJR’s operations.</p>

Number	Delegation	Delegate	Limitation
Previously delegated	Authority to enter into a cost sharing agreement with the County of Wellington, Township of Puslinch and Guelph/Eramosa Township, subject to the satisfaction of the City Solicitor, for Source Water Protection Services.	Deputy CAO, Infrastructure, Development and Enterprise Services.	Subject to the satisfaction of the City Solicitor.

**Table 10: Economic Development and Tourism**

Number	Delegation	Delegate	Limitation
V	Authority to negotiate the purchase price for the sale of City-owned lands with prospective land purchasers in the Hanlon Creek Business Park (“HCBP”).	General Manager, Economic Development and Tourism.	<p>Delegation of authority is limited to the sale of City-owned land in the HCBP.</p> <p>Delegation of authority is to be within established guidelines and parameters as approved by Council.</p> <p><b>Reporting:</b></p> <p>Information reports to be prepared and circulated to Council providing details of the sale and the purchaser, and any subsequent amendment to, or termination of, an offer to purchase/agreement of purchase and sale.</p>
R	Authority to amend the Downtown Guelph Community Improvement Plan (“DGCIP”) Implementation Guidelines.	General Manager, Economic Development and Tourism.	<p>This delegation does not supersede any approvals required under section 28 of the <i>Planning Act</i>, as amended, such as adoption of the CIP or major amendments to the CIP.</p> <p>The addition of new programs or changes to the DGCIP area, or any changes that result in a financial impact to the City (e.g., beyond Council-approved budgets), is not delegated to City staff.</p> <p><b>Reporting:</b></p> <p>Annual reporting to Council on any amendments.</p>

Number	Delegation	Delegate	Limitation
Q	Authority to award Downtown Guelph Community Improvement Plan (“CIP”) grants, particularly the Façade Improvement Grant and Feasibility Study Grant.	Deputy CAO, Infrastructure, Development and Enterprise Services; General Manager, Economic Development and Tourism.	<p>Grants shall be awarded to support City programs funded through a current year’s budget, where the maximum budget for CIP grant will also be set.</p> <p>The associated expenditure is in compliance with the Procurement By-law.</p> <p>This delegation does not supersede any approvals required under section 28 of the <i>Planning Act</i>, as amended, such as adoption of the CIP or major amendments to the CIP.</p> <p><b>Review:</b></p> <p>All grant applications are reviewed by the CIP Review Team, as outlined in the CIP Implementation Guidelines, which may consult with appropriate City staff as the Team determines necessary.</p> <p><b>Reporting:</b></p> <p>Annual Information Report to Council.</p>

**Table 11: Engineering and Transportation Services**

Number	Delegation	Delegate	Limitation
I	Authority to approve temporary road closures necessitated by construction, routine operations, rehabilitation, maintenance and repairs.	Deputy CAO, Infrastructure, Development and Enterprise Services; General Manager, Engineering and Transportation Services/City Engineer.	<p>The delegate must ensure that the closure has been coordinated with the appropriate City departments and community partners.</p> <p>Any temporary traffic control measures put in place must be as brief in duration as reasonably possible and be designed to minimally impair community and municipal operations.</p> <p>All temporary road closures are to be consistent with the requirements set out in Book 7 of the Ontario Traffic Manual, including provisions related to community notice, and appropriate signage.</p> <p><b>Reporting:</b></p> <p>Annual information report for temporary road closures of longer than 24 hours are authorized under this delegation.</p>

Number	Delegation	Delegate	Limitation
MM	Authority to approve the reduction of posted speed limits and turn prohibitions in construction zones.	CAO, Deputy CAO, Infrastructure, Development and Enterprise Services; General Manager, Engineering and Transportation Services/City Engineer.	<p>The delegate must ensure that the closure has been coordinated with the appropriate City departments and community partners.</p> <p>Any temporary traffic control measures put in place must be as brief in duration as reasonably possible and be designed to minimally impair community and municipal operations.</p> <p>All temporary road closures are to be consistent with the requirements set out in Book 7 of the Ontario Traffic Manual, including provisions related to community notice, and appropriate signage.</p> <p><b>Reporting:</b></p> <p>Annual information report for temporary road closures of longer than 24 hours are authorized under this delegation.</p>
Doc ex 2.3	Authority to approve, execute, amend and terminate agreements regarding road construction and/or road maintenance.	Deputy CAO of Infrastructure, Development and Enterprise Services; General Manager, Engineering and Transportation Services/City Engineer.	<p>Agreements must be in support of programs or projects approved by Council.</p> <p>Agreements are in compliance with the Procurement By-law.</p>
Previously delegated	Authority to approve the processing of subdivision developments under the assumption model pursuant to an approval by Council under the Planning Act, as amended.	Deputy CAO, Infrastructure, Development and Enterprise Services; General Manager, Engineering and Transportation Services/City Engineer.	<p>Any conditions prescribed by Council must be included in agreements executed under this delegation.</p> <p><b>Reporting:</b></p> <p>Annual Information Report to Council on agreements signed under this delegation.</p>
W	Authority to approve traffic signal drawings.	Deputy CAO, Infrastructure, Development and Enterprise Services; General Manager, Engineering and Transportation Services/City Engineer; General Manager	<p><b>Reporting:</b></p> <p>Annual Information Report to Council on approval of traffic signal drawings pursuant to this delegation of authority.</p>

**Table 12: Facilities and Energy Management**

Number	Delegation	Delegate	Limitation
Doc ex 6.1, 6.2, 6.3	Authority to execute, amend, or terminate agreements, and other documents related to the distribution and delivery of energy, including, but not limited to, agreements with local electrical utilities and agreements with energy commodity suppliers.	General Manager, Facilities and Energy Management.	
Previously Delegated	Authority to approve and execute all agreements related to the Guelph Greener Homes Program.  Authority to approve and execute the property owner agreements on behalf of the City in relation to the Guelph Greener Homes Program.	Deputy CAO, Infrastructure, Development and Enterprise Services; General Manager, Facilities and Energy Management; Manager, Corporate Energy and Climate Change; City Clerk.	Applies equally to supplementary documents, agreements, amendments, renewals and termination of such agreements.

**Table 13: Environmental Services**

Number	Delegation	Delegate	Limitation
Doc ex 2.1	Authority to execute agreements relating to the supply of water and sewer within the City.	General Manager, Environmental Services.	Agreements must be in support of programs or projects approved by Council.
FF	Authority to appoint Risk Management Officials and Risk Management Inspectors.	Deputy CAO, Infrastructure, Development and Enterprise Services.	Must conform to the Clean Water Act, 2006 and associated regulations, as amended.  <b>Reporting:</b>  Annual Information Report to Council on the number of appointments under this delegation.

**Table 14: Planning and Building Services**

Number	Delegation	Delegate	Limitation
E; Doc ex 4.1	<p>Authority to approve and execute, agreements, amendments or termination of agreements, pursuant to any condition of approval by Council under the <i>Planning Act</i>, as amended, in connection with the development of land, where the City is not the applicant, including, but not limited to,:</p> <ul style="list-style-type: none"><li>• section 37, increased density;</li><li>• section 40, parking;</li><li>• section 41, site plan approvals; and</li><li>• section 51, subdivisions, including condominiums.</li></ul> <p>Authority to approve and execute any acknowledgements of compliance pursuant to any such agreement.</p>	Deputy CAO, Infrastructure, Development and Enterprise Services; General Manager, Planning and Building Services.	<p>Any conditions prescribed by Council must be included in agreements executed under this delegation.</p> <p>Where applicable, timing of a development has been approved by Council in the Development Priorities Plan.</p> <p><b>Reporting:</b></p> <p>Annual Information Report to Council on agreements signed under this delegation.</p>
Doc ex 4.2	Authority to execute documents required in satisfaction of any condition of approval under the Planning Act or the Building Code Act, 1992, as amended, in connection with the development of City lands or buildings, provided approved by Council.	General Manager, Planning and Building Services.	Where the City is the applicant, projects must be approved by Council prior to the execution of documents.
GG	Authority to approve residential demolition permits.	<p>General Manager, Planning and Building Services.</p> <p>This delegation cannot be exercised by the CAO.</p>	<p>The applicant must have paid all demolition permit fees.</p> <p>Council will retain the power to issue or deny demolition permits with respect to buildings listed (non-designated) on the Municipal Register of Cultural Heritage Properties or designated under Part IV or V of the Ontario Heritage Act, as amended.</p> <p><b>Review:</b></p> <p>If the application for a demolition permit is not supported by the delegate, the applicant may request a decision from Council.</p> <p><b>Reporting:</b></p> <p>Annual information report on the number of residential demolition permits approved.</p>

Number	Delegation	Delegate	Limitation
DD	Authority to approve certain types of alterations through heritage permit applications.	General Manager, Planning and Building Services.  This delegation cannot be exercised by the CAO.	<p>This delegation excludes applications for demolitions and new buildings/structures. These must be considered by Council.</p> <p>The delegate does not have the authority to refuse heritage permit applications. If the delegate does not support the approval of an application, then it shall be referred to Council.</p> <p><b>Review:</b></p> <p>Under the Ontario Heritage Act, as amended, applicants may appeal to the OLT a refusal of a heritage permit application or the conditions imposed.</p> <p>Heritage permit applications that cannot be resolved between the applicant and City staff will be forwarded to Council for consideration and a decision.</p> <p><b>Reporting:</b></p> <p>Annual information report on heritage permits approved during the year.</p>

**Public Services**

Deputy Chief Administrative Officer

**Table 15: Public Services**

Number	Delegation	Delegate	Limitation
O	Authority to approve or make minor amendments to exemptions to the Noise Control By-law, as amended from time to time, for events that have been exempt in the past and analogous events with a substantially similar impact.	Deputy CAO, Public Services.	<p>Notice of all exemptions shall be published on the City’s Web site.</p> <p><b>Review:</b></p> <p>Where an application has been denied, the applicant may request that the decision be reviewed by Council.</p> <p>A person who has reason to believe that they will be negatively impacted by an approved special event may request that the decision to approve be reviewed by Council.</p> <p><b>Reporting:</b></p> <p>Annual Information report to Council.</p>

Number	Delegation	Delegate	Limitation
NN	Authority to issue, amend, retract and execute letters of support to winery, brewery and distillery owners that hold a manufacturer's license under the Liquor License and Control Act, 2019, as amended, and located within the City of Guelph, who make an application to the AGCO for a "By the Glass" Manufacturer's Limited Liquor Sales License.	CAO; Deputy CAO, Public Services; General Manager, Operations.	<p>Applicants must submit a completed application in accordance with the AGCO's requirements, a copy of a floor plan of the location and a formal written request for a "By the Glass" Manufacturer's Limited Liquor Sales License letter of support together with any other supporting documentation/information required by the City.</p> <p><b>Review:</b></p> <p>Prior to the letter of support being issued, all such requests are circulated to the Guelph Fire Department, the Guelph Police Service, the Corporate and Community Safety Division, and the Zoning Division for comments.</p> <p>A resolution is passed by Council in support of "By The Glass" Manufacturer's Limited Liquor Sales License.</p> <p><b>Reporting:</b></p> <p>Annual Information Report to Council on the number of letters of support issued during any given year pursuant to this delegation of authority.</p>



Number	Delegation	Delegate	Limitation
J	Authority to approve temporary road closures for special events.	Deputy CAO, Public Services; General Manager, Operations; General Manager, Culture and Recreation.	<p>The delegate must ensure that the closure has been coordinated with the appropriate City departments and community partners.</p> <p>Any temporary traffic control measures put in place must be as brief in duration as reasonably possible and be designed to minimally impair community and municipal operations.</p> <p>Th delegate must review the applicant's ability to adhere to the City of Guelph Special Event User Guide.</p> <p><b>Review:</b></p> <p>Where an application has been denied, the applicant may request that the decision be reviewed by Council.</p> <p>A person who has reason to believe that they will be negatively impacted by an approved special event may request that the decision to approve be reviewed by Council.</p> <p><b>Reporting:</b></p> <p>Annual Information Report to Council for each temporary road closure authorized pursuant to this delegation of authority.</p>

Number	Delegation	Delegate	Limitation
K/L	Authority to approve the holding of special events in City parks or City recreational and culture facilities.	Deputy CAO, Public Services; General Manager, Culture and Recreation	<p>The delegate must ensure that the closure has been coordinated with the appropriate City departments and community partners.</p> <p>Any temporary traffic control measures put in place must be as brief in duration as reasonably possible and be designed to minimally impair community and municipal operations.</p> <p>The delegate must review the applicant's ability to adhere to the City of Guelph Special Event User Guide.</p> <p><b>Review:</b></p> <p>Where an application has been denied, the applicant may request that the decision be reviewed by Council.</p> <p>Where a person has reason to believe they will be negatively impacted by an approved special event in a City park, they may request that the decision to approve be reviewed by Council.</p> <p><b>Reporting:</b></p> <p>Annual Information Report to Council for events held in parks and special events authorized pursuant to this delegation of authority.</p>
N	Authority to approve agreements for the use of emergency services training facilities by the City. The delegation also applies equally to any amendment or termination of such agreements.	Deputy CAO, Public Services, and General Manager of the Guelph/Wellington Paramedic Service.	Fees for such services are approved by Council as part of the annual operating budget.
Y	Authority to approve the making of funding decisions and allocate City funds as part of the Community Innovation Connection collaboration.	Deputy CAO, Public Services.	<p>City funding to the Community Innovation Connection must be funded through a current year's operating budget, which has been approved by Council.</p> <p><b>Reporting:</b></p> <p>Annual Information Report to Council.</p>

Number	Delegation	Delegate	Limitation
F	Authority to approve the execution, amendment or termination of agreements for parking enforcement on private property.	Deputy CAO, Public Services.	Property owners or their agents may request that these agreements be established on the property in accordance with the parking By-laws in effect in the City.  <b>Reporting:</b> Annual Information Report to Council on agreements executed under this delegation.
Doc ex 6.5	Execute, amend or terminate applications to Federal, Provincial or Municipal governments, Agencies, Boards, Commissions, Authorities for licenses, or certificates (including, but not limited to, certificates/licenses for liquor, vehicles, elevators, and radio) required for the delivery of projects or programs approved by Council.	Deputy CAO, Public Services; General Manager, Culture and Recreation; General Manager, Guelph-Wellington Paramedic Services; General Manager, Fire Services/Fire Chief; General Manager; Guelph Transit; General Manager, Operations; General Manager, Parks.	
Doc ex 6.14	Authority to execute, amend or terminate agreements for the loan by the City from another party of equipment or other goods.	Deputy CAO, Infrastructure, Development and Enterprise Services; General Manager, Economic Development and Tourism; General Manager, Environmental Services; General Manager, Planning and Building Services; General Manager, Facilities and Energy Management.	The associated expenditure is in compliance with the Procurement By-law.

Number	Delegation	Delegate	Limitation
Doc ex 6.6	Authority to execute agreements accepting the transfer, to the City, of items having significance to Guelph’s heritage, permanently or on loan.	Deputy CAO, Public Services; General Manager, Culture and Recreation; General Manager, Operations; General Manager, Parks.	The associated expenditure is in compliance with the Procurement By-law.
G	Authority to approve, the execution, amendment, or termination of agreements for the provision of fire dispatch services by the City to municipalities within the County of Wellington.	Deputy CAO, Public Services; Fire Chief	Fees for such services are approved as part of the annual operating budget by Council.  <b>Reporting:</b> Annual information report on agreements executed under this delegation.
H	Authority to approve the execution, amendment, or termination of agreements with telephone service providers for 9-1-1 service.	Deputy CAO, Public Services; Fire Chief; Guelph-Wellington Paramedic Service Chief	Fees for such services are approved as part of the annual operating budget by Council.  <b>Reporting:</b> Annual information report on agreements executed under this delegation.

**Table 16: Culture and Recreation**

Number	Delegation	Delegate	Limitation
X	Authority to approve the execution of the Community Benefit Agreement as outlined in the Community Investment Strategy.	Deputy CAO, Public Services; General Manager, Culture and Recreation.	Agreements funded through a current year’s operating or capital budget, which has been approved by Council.  <b>Reporting:</b> Annual Information Report on all agreements.
U	Authority to approve the execution of Community Wellbeing Grant allocations.	The Wellbeing Grants Allocation Panel.	The grant must be funded through a current year’s operating or capital budget, which has been approved by Council.  <b>Reporting:</b> Annual Information Report to Council on grants awarded under this delegation.

**Table 17: Operations**

Number	Delegation	Delegate	Limitation
I	Authority to approve temporary road closures necessitated by construction, routine operations, rehabilitation, maintenance and repairs.	Deputy CAO, Public Services; General Manager, Operations.	<p>The delegate must ensure that the closure has been coordinated with the appropriate City departments and community partners.</p> <p>Any temporary traffic control measures put in place must be as brief in duration as reasonably possible and be designed to minimally impair community and municipal operations.</p> <p>All temporary road closures are to be consistent with the requirements set out in Book 7 of the Ontario Traffic Manual, including provisions related to community notice, and appropriate signage.</p> <p><b>Reporting:</b></p> <p>Annual information report for temporary road closures of longer than 24 hours authorized under this delegation.</p>
T	Approve temporary exemptions to the Exotic Animal Control By-laws, as amended from time to time.	Deputy CAO, Public Services; General Manager, Operations.	<p>All temporary exemptions shall be time limited to no more than 90 days, after which time Council must approve further exemptions.</p> <p><b>Reporting:</b></p> <p>Annual Information Report to Council on the number of exemptions granted each year.</p>
BB	Authority to Issue Lottery Licenses.	Deputy CAO, Public Services; General Manager, Operations; Manager, Corporate and Community Safety.	<p><b>Reporting:</b></p> <p>Annual Information Report to Council on the lottery licenses issued.</p>

Number	Delegation	Delegate	Limitation
LL	Authority to make written submissions to the Registrar under the Cannabis Licence Act, 2018, as amended, as to whether the proposed issuances of cannabis retail store authorizations are in the public interest as defined in Ontario Regulation 466/18 made under that Act.	Deputy CAO, Public Services; General Manager, Operations; Manager, Corporate and Community Safety.	<p>The only possible ground for making a written submission is if the issuance of a proposed cannabis retail store authorization is not in the public interest, having regard to the needs and wishes of the residents of the City of Guelph because the proposed location of the proposed store is within 150 metres of an addiction centre (such as Homewood Health Centre); a health centre (such as Guelph Community Health Centre, Hope House, Shelldale Community Health Centre, Wyndham House); a registered daycare; a playground; a public library; a recreation centre (such as Guelph Youth Music Centre, Victoria Road Recreation Centre, West End Community Centre, YMCA); the University of Guelph main campus; or the Conestoga College main campus.</p> <p><b>Reporting:</b></p> <p>Annual information report to Council on cannabis retail store applications.</p>
Doc ex 2.3	Authority to approve, execute, amend or terminate agreements regarding road construction and/or road maintenance.	Deputy CAO, Public Services; General Manager, Operations.	Agreements must be in support of programs or projects approved by Council.

# Staff Report



---

To	<b>Committee of the Whole</b>
Service Area	Infrastructure, Development and Enterprise Services
Date	Tuesday, April 4, 2023
Subject	<b>Water and Wastewater Servicing Master Plan Recommendations</b>

---

## Recommendation

1. That the Water and Wastewater Servicing Master Plan be approved, and that staff be directed to file a Municipal Class Environmental Assessment Notice of Completion.
2. That the financial information from the Water and Wastewater Servicing Master Plan be referred to the City's water and wastewater rate models and long-range financial plans through the multi-year budget process.

---

## Executive Summary

### Purpose of Report

This report summarizes the [Water and Wastewater Servicing Master Plan](#) (W/WW MP) update. The W/WW MP update has built off the previously completed [W/WW MP in 2008](#), as amended by the supporting water and wastewater studies for the 2018 Development Charges Background study. The water distribution includes a series of watermains, booster pump stations, and storage tanks that ensure that water moves from Guelph's water supply sources (as studied in the [Water Supply Master Plan](#)) to end users throughout the city. The wastewater collection system collects sewage from homes and businesses and carries it through a series of pipes, forcemains, and pump stations to the Water Resource Recovery Centre (as studied in the [Wastewater Treatment and Biosolids Master Plan](#)). The W/WW MP has studied Guelph's existing water distribution and wastewater collection networks, considered the impact of population and employment growth beyond 2051 and recommended a W/WW servicing strategy to mitigate capacity constraints.

### Key Findings

The W/WW MP has been undertaken consistent with Ontario Regulations as a Municipal Class Environmental Assessment. The recommended approach of the W/WW MP includes a portfolio of water distribution and wastewater collections projects and programs that aim to:

- Provide the framework, design criteria, and infrastructure requirements to develop resilient water and wastewater networks to support growth in alignment with Official Plan Amendment (OPA) 80;

- Eliminate inefficiencies in the system where possible; and
- Consider the use of innovative technologies for improved water and wastewater level of service.

The W/WW MP has been informed by more than two years of technical work and community engagement and has been coordinated to align with the City's Water Supply Master Plan and Wastewater Treatment and Biosolids Master Plan.

### **Strategic Plan Alignment**

The W/WW MP will allow for advancement of the Building our Future Strategic Plan pillar as it recommends upgrades to existing assets and creation of new assets to support growth in alignment with OPA 80. It aligns with the Working Together for our Future pillar through exploration of increased use of technology and data and digital delivery. It aligns with the Sustaining our Future pillar as it seeks to save energy on treatment costs by recommending the creation of a strategic Inflow and Infiltration reduction strategy, as well as reduce energy requirements in the linear system (sanitary and potable water pump stations) by optimizing the existing system to the maximum extent possible. Reducing energy consumption will result directly in greenhouse gas reductions. Finally, it is tied to Powering our Future through protection of infrastructure assets, promotion of innovative water and wastewater linear servicing, and sustainability – all working together to support a thriving economy and community.

### **Financial Implications**

The plan provides costs for capital works, programs, and new resources to implement the water and wastewater servicing system upgrades required to support future growth to 2051+. The total additional costs above the works already captured in the current 25-year capital budget are \$173.1 million for water and \$7.1 million for wastewater. Project alignments within road corridors will be scheduled in alignment with asset management and other utility works in the corridor. The W/WW MP projects will be incorporated into the 2024-2027 multi-year budget (MYB). If all projects are completed between 2024-2051, as the Master Plan suggests, this would represent an additional \$6.4 million for water and \$0.3 million for wastewater annually; however, projects will be prioritized based on fiscal and human constraints, and in alignment with all organizational priorities, which means the actual budgeting may extend beyond 2051. Increased resources are required to deliver the W/WW MP programs and projects, some of which have been previously identified in the [Capital Program Resourcing Strategy](#) and any new resources would be requested through the multi-year budget.

The majority of the projects recommended in the W/WW MP include a growth-related component and are included in the ongoing Development Charges Background Study to be funded by development charges (DCs). Any shortfall in DC funding for growth projects and non-growth portion of capital projects as well as operating costs would be rate funded through the Water and Wastewater user rates. The rate model is currently being reviewed and once complete, will be used to forecast the long-term rate impact of the W/WW MP and provided to Council ahead of the multi-year budget through the forthcoming long range financial plan for water and wastewater

---



# Report

## Project Background

The [W/WW MP](#) builds from the first comprehensive City-wide [Water and Wastewater Servicing Master Plan completed in 2008](#) and the updated modelling work completed in 2015 in support of the 2018 Development Charges Background Study. The previous studies recommended a series of improvements to the water and wastewater networks, some of which have been undertaken including the York Trunk Sewer and Clythe Feedermain. The master plans build on the goals and policies from the Official Plan to integrate existing and future land use plans and define long-term needs. The overarching study objective is to develop a long-range plan for efficient distribution of water and collection of wastewater in the existing condition and to support growth to 2051+, while considering the effects of climate change on system design.

## Overview of the W/WW MP

The study was initiated in 2020 and was undertaken as a Municipal Class Environmental Assessment (Class EA), fulfilling Schedule B project requirements. The study identified alternative servicing solutions for the linear water and wastewater networks that were evaluated against technical, economic, environmental, and social criteria. The recommended strategies are as follows:

### Water Distribution System

Improvements to Existing System – New Facilities and Watermains: The preferred strategy includes a series of new watermains to provide appropriate pressures and fire flows across the city. It recommends improvements to existing pumping infrastructure and replacement of storage elements at the end of their service life.

Of note are the improvements for the water transmission system from the Arkell Spring Grounds supply system. The Arkell Aqueduct (the ~6.5km long pipe connecting the Arkell Spring Grounds to F.M. Woods Water Treatment Plant, see Figure 1) is a key piece of infrastructure that supplies Guelph with most of its water. The recommended approach includes building treatment capacity at the Arkell Spring Grounds property and providing water directly to the south end of the City through a new transmission watermain along Arkell and Victoria or Gordon and Clair. This eliminates the need for additional north-south water transmission from F.M. Woods to the south end and supports maximum day water demand in the future growth conditions. In the event of a failure in the existing Arkell Aqueduct, the new infrastructure would have capacity to maintain a maximum day demand level of service, meaning there would be no requirements for water restrictions, fire flow implications, nor impacts to business operations. This design solution will be subject to further study in the form of a Schedule C EA including more consultation with the public, Wellington County and Puslinch Township.

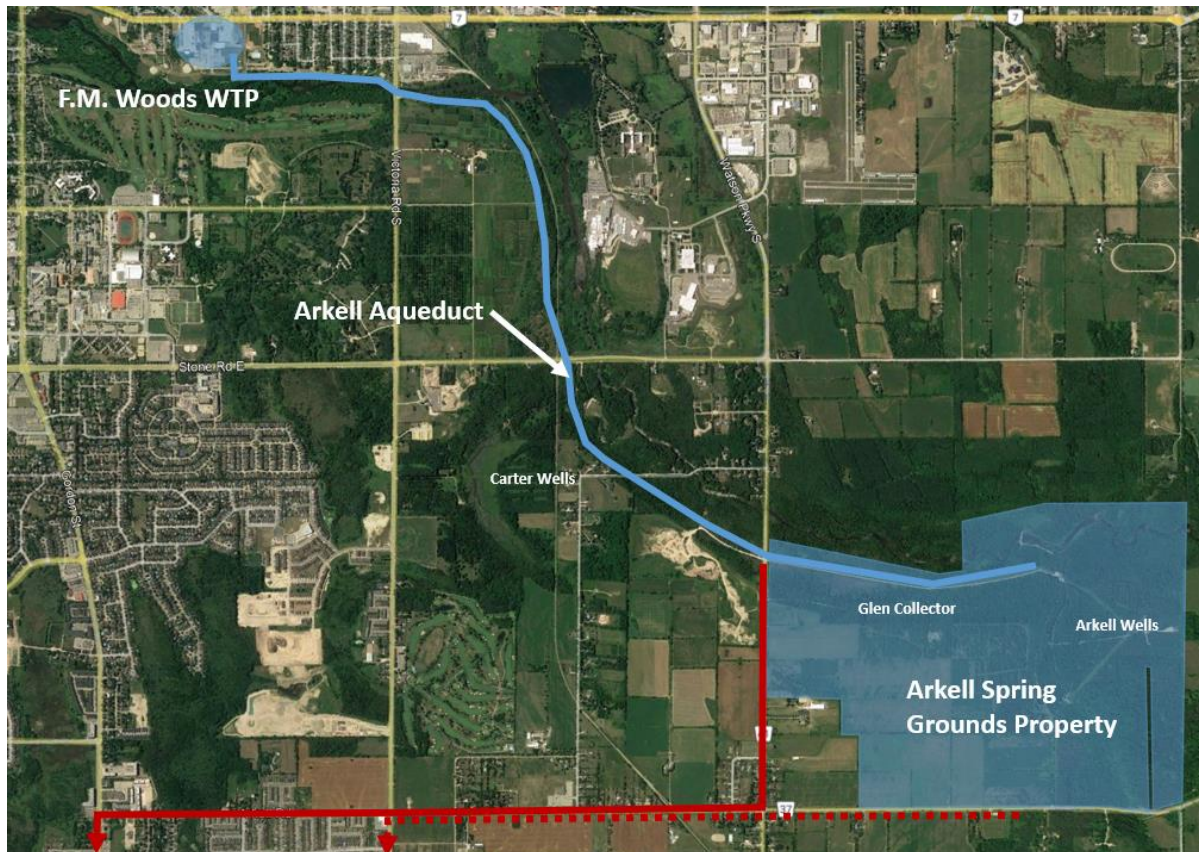


Figure 1 - Arkell Aqueduct Resiliency Solution

## Wastewater Collection System

Improvements to Existing System – New Trunk Sewers and Strategic Flow Diversions: New sewers are proposed to alleviate existing capacity issues and create available capacity to support growth focused in seven areas across the City. Prioritization was given, where possible, to divert flow to existing sewers with capacity to minimize new construction work. Most projects will be aligned with other corridor works and asset renewal projects. One series of projects includes the trunk sewers approaching the Water Resource Recovery Centre (WRRRC) that are experiencing capacity constraints in the existing and future conditions which requires further preliminary study to ensure the most efficient, resilient, and cost-effective set of projects is recommended.

The study also included a review of innovative water and wastewater related practices and recommendations for programs to move Guelph forward as a data-driven smart city.

A full summary of the process and projects included as part of the recommended servicing strategy, including mapping, is included in the [Draft Project File Executive Summary](#).

## Key Considerations

### OPA 80 and Growth to 2051+

OPA 80 provided growth target inputs for the W/WW MP. However, consideration was required due to the discrepancy between the planning horizon (~27 years) and the service life of linear infrastructure (~80-100 years). To align with good

infrastructure planning principles, it was necessary to consider the ultimate population within the service life of the linear infrastructure to ensure sewers and/or watermains installed in 2030 were not undersized in 2052. This was done by maximizing the populations in the Strategic Growth Areas to the top end of the proposed density ranges. This approach supports a future-ready Guelph.

### **Bill 23 Impacts**

The future population used to assess the water and wastewater system, identify capacity constraints, and recommend infrastructure upgrades is based on the growth assumptions from OPA 80. Many upgrades are required based on current capacity issues from existing flows while some projects are entirely driven by growth. The introduction of Bill 23 will require the team to carefully monitor alignment of the master plan priorities and actual growth. The plan will be examined and updated every 5 years.

The projects identified in this study remain valid, especially those prioritized for the next 5 years. Priority is given to projects where existing capacity issues are present, and further exacerbated by growth. The W/WW MP is still valid considering Bill 23 and that modification to the technical work is not required in advance of the next 5-year master planning cycle. Bill 23, however, does suggest a faster pace to implement projects (the 2023-2041 horizon is accelerated to 2031). This impact will be addressed through the Development Charges Background Study and multi-year budget for 2024-2027 where resource and budgetary requirements from the Master Plans will be incorporated.

### **Inflow and Infiltration**

Inflow and infiltration, or I&I, is ground and surface water that enters the wastewater collection system. This “clean” water uses space in the collection system and energy and capacity at the treatment plant. The City has initiated I&I studies in the past, specifically targeting the Downtown and Clair-Gordon areas. The W/WW MP recommends developing a City-wide strategy to manage and eliminate sources of I&I to gain capacity and save energy in our wastewater collection and treatment system. The I&I strategy will include annual reduction programs through capital works as well as the continuation of the flow monitoring program, which helps identify areas of the collection system that are more vulnerable to I&I. This is a key program to save energy at the WRRC and to gain capacity back into the system and supports a future-ready Guelph.

### **Climate Change**

Climate resiliency is supported through this master plan through a focus on inflow and infiltration reduction programming to lower the wet weather response in the sanitary collection system. As well, the water component of this study has sought to optimize water supply sources and distribution projects to have more efficient movement of water throughout the system, reducing energy costs for pumping. Finally, the Arkell Spring Grounds & Transmission main project is a major component of creating a climate resilient water distribution network – it offers a redundant water supply should the existing aqueduct experience failure, for which the risk may be increased due to future climate conditions. Finally, the plan recommends continuation of the water conservation and integrated water management plan programming that is ongoing at the City.

## **Equity**

Water and wastewater projects have been identified across the entire City. As part of the study, the capacity deficiencies in the existing system were identified. Areas of the City experiencing capacity deficiencies in the existing system have been prioritized for upgrade in the short-term to provide the same level of water and wastewater servicing across the City. Where other corridor works overlap with proposed works in the W/WW MP, the projects will be aligned to realize efficiencies. The Transportation Master Plan (TMP) prioritized corridors based on a number of criteria, including equity. By aligning works identified in this W/WW MP with corridor works driven by the TMP, the same corridors are being equitably prioritized for water and wastewater service upgrades, where applicable.

## **Next Steps**

Most of the projects in the W/WW MP have been aligned with planned corridor works from the TMP or the Corporate Asset Management Plan.

Two major projects require further study:

1. The Wastewater Area 5 preliminary design assignment, which will look at the trunk sewers near the WRRRC; and,
2. The Arkell Spring Grounds project, which is subject to further study under the Class EA process.

All of the works will be captured, scheduled, and resourced through the development of the 2024-2027 multi-year budget. The financial information from this project will also be referred to the ongoing Development Charges Background Study and rate study. The W/WW MP is required to be updated at 5-year intervals.

## **Financial Implications**

The plan provides costs for capital works, programs and new resources to implement the water and wastewater servicing system upgrades required to support future growth to 2051+. It includes timelines to complete the works between 2024 and 2051 (the vision), however it is acknowledged that that other organizational priorities must be considered when adding these projects to the rest of the ongoing and proposed works across the city.

The current 25-yr capital budget includes \$117.6 million for water and \$93.0 million for wastewater projects relevant to the W/WW MP (not inclusive of water supply and wastewater treatment projects). The total additional costs above the works already captured in the current 25-year capital budget are \$173.1 million and \$7.1 million for water and wastewater, respectively. Project alignments within road corridors will be scheduled in alignment with asset management and other utility works in the corridor. The W/WW MP projects will be incorporated into the 2024-2027 multi-year budget (MYB). If all projects are completed between 2024-2051, as the MP suggests, this would be an additional \$6.4 million and \$0.3 million for water and wastewater annually. However, the number of projects (and associated costs) forecasted for each year will be established through the multi-year budget process with consideration for impact to user rates and affordability. The MYB focuses on balancing all priorities throughout the City with a focus affordability, equity, and ability to deliver.

To implement the capital projects across the 2024–2051-time horizon, an annual operating budget impact of \$293 thousand is anticipated beyond resource requirements previously forecast in the [Capital Program Resource Strategy](#). New resource requests will be included in future multi-year budgets.

With respect to maintenance/operational financial and staff resourcing needs, most of the recommendations in the W/WW MP include replacement/upsizing of infrastructure in existing alignments, with similar anticipated operational needs to the current condition, and as captured in the current operating budget. The Arkell Spring Grounds program of works will result in a new facility that will have operational needs. The magnitude will be assessed as part of the Schedule C Class EA to be completed.

## **Funding Sources**

The majority of the projects recommended in the W/WW MP include a growth-related component and are included in the ongoing Development Charges Background Study to be funded by development charges (DCs).

Any shortfall in DC funding for growth projects and non-growth portion of capital projects as well as operating costs would be rate funded through the Water and Wastewater user rates. The rate model is currently being reviewed and once complete, will be used to forecast the long-term rate impact of the W/WW MP and provided to Council ahead of the multi-year budget through the forthcoming long range financial plan for water and wastewater. All projected financial impacts would be prioritized and reviewed in the multi-year budget with the lens of affordability and equity while balancing the need to complete regulated works.

There are potential federal and provincial funding opportunities that could be leveraged to fund water and wastewater related projects. Staff are committed to exploring these opportunities.

## **Consultations**

### **Internal Consultation**

Environmental Services, Planning and Building Services, Finance, Legal, Realty, and Court Services, and Engineering and Transportation Services have been engaged on technical deliverables and policies throughout the process.

### **Indigenous Consultation**

Project notification has been provided to Mississaugas of the Credit First Nation (MCFN), Six Nations of the Grand River (SN), Metis, and the Haudenosaunee Confederacy Chiefs Council (through Haudenosaunee Development Institute) at the project onset and in November 2022 in advance of the Public Open House. Notification will be provided for the study completion following direction from Council to finish the study.

Further, the City has met with MCFN and SN on water-related master plans (W/WW MP, Stormwater Management MP) in the fall of 2021. Commitments to engage during future preliminary and detailed design, particularly during archaeological investigations, were made.

### **Public Consultation**

Public Open House #1 was held virtually from October 28, 2020 to November 30, 2020. Participants were invited to complete a survey and mapping exercise that

provided early inputs about stormwater management across the City. Feedback indicated minimal water and wastewater service issues across the City.

Public Open House #2 was held virtually and in person on November 28, 2022 with the commenting period extending to December 20, 2022 on Have Your Say. Correspondence was largely around timing of proposed works and inflow and infiltration.

### **Intergovernmental Consultation**

The W/WW MP proposes works on the Arkell Spring Grounds, which is property owned by the City but within the Township of Puslinch. The preliminary alignment of the watermain to connect the Arkell Spring Grounds is on County Roads 37 and 41 (pending location of facilities). Preliminary consultation has occurred with the Township of Puslinch through a meeting on November 22, 2022. The County of Wellington offered preliminary support through e-mail correspondence on December 12, 2022. Both governments will be engaged further in the Schedule C Class EA process.

### **Attachments**

#### **Departmental Approval**

Reg Russwurm, P. Eng., MBA, Manager, Design and Construction

Mary Angelo, P. Eng., Manager, Development and Environmental Engineering

Tim Robertson, P. Eng., Division Manager, Wastewater Services

Wayne Galliher, P. Eng., Division Manager, Water Services

Colm Lynn, Finance

#### **Report Author**

Colleen Gammie, P.Eng., PMP, Infrastructure Planning Engineer

#### **This report was approved by:**

Terry Gayman, P.Eng.

General Manager/City Engineer, Engineering and Transportation Services

Infrastructure, Development and Enterprise Services

519-822-1260 extension 2369

terry.gayman@guelph.ca

#### **This report was recommended by:**

Jayne Holmes, P.Eng., PMP

Deputy Chief Administrative Officer

Infrastructure, Development and Enterprise Services

519-822-1260 extension 2248

jayne.holmes@guelph.ca



# Staff Report



---

To	<b>Committee of the Whole</b>
Service Area	Infrastructure, Development and Enterprise Services
Date	Tuesday, April 4, 2023
Subject	<b>Stormwater Management Master Plan Recommendations</b>

---

## Recommendation

1. That the Stormwater Management Master Plan be approved and that staff be directed to file a Municipal Class Environmental Assessment Notice of Completion.
2. That the financial implications from the Stormwater Management Master Plan be referred to the City's multi-year budget process.

---

## Executive Summary

### Purpose of Report

This report summarizes the [Stormwater Management Master Plan \(SWM MP\)](#) update that has built off the previously completed [SWM MP in 2012](#). Stormwater management is a key service that the City provides to prevent flooding, improve drinking water quality, protect road and pipe infrastructure, enhance and protect the health of our Natural Heritage System (NHS), and to maintain a thriving community and economy. The SWM MP has studied Guelph's existing stormwater infrastructure, future stormwater needs to accommodate changes to Guelph's population, impervious cover, climate change, and drinking water quality protection needs, and it has incorporated current Provincial policy and industry best practices. The SWM MP has studied needs for a growth period to 2051 (in alignment with Official Plan Amendment 80).

### Key Findings

The SWM MP has been undertaken as a Municipal Class Environmental Assessment. The SWM MP's recommended approach includes a portfolio of stormwater management projects and programs that aim to:

- provide the framework, design criteria, and infrastructure requirements to develop a resilient stormwater management network that adapts to climate change; and
- provide guidance on how to treat stormwater and maintain the infrastructure to provide the level of service required by the Province and in line with industry best practice.

The SWM MP has been informed by more than two years of technical work and community engagement.

## Strategic Plan Alignment

The SWM MP aligns with the Sustaining our Future pillar by recommending projects and policies that protect our environment, water quality, and our NHS, and by establishing design criteria and frameworks to allow green infrastructure (with co-benefits such as increased tree canopy, greenhouse gas treatment) in our road right of ways and on public and private property.

The SWM MP aligns with the Navigating our Future pillar by recommending projects that will mitigate negative impacts to road infrastructure (washout, flooding) and also enhance road right of ways with green infrastructure.

The SWM MP also prioritizes maintenance and retrofits of existing stormwater management facilities and other assets in alignment the asset management action in the Building our Future pillar.

Finally, the SWM MP is tied to Powering our Future through protection of environment, management of infrastructure, promotion of innovative stormwater management, and sustainability – all working together to support a thriving economy and community.

## Financial Implications

The plan provides costs for capital works, programs, operations and maintenance, and new resources to implement the recommended stormwater management approach for the future. The total additional cost above the works already captured in the current 25-year capital budget is \$300.1 million. Project alignments within road corridors will be scheduled in alignment with asset management and other utility works in the corridor. The SWM MP capital projects will be incorporated into the 2024-2027 multi-year budget (MYB). If all projects are completed between 2024-2051, as the masterplan suggests, this would be an additional \$11.1 million annually; however, projects will be prioritized based on fiscal and human constraints, and in alignment with all organizational priorities, which means the costs are expected to be spread out beyond the 2051 timeframe. Increased resources are required to deliver the SWM MP programs and projects, some of which have been previously identified in the [Capital Program Resourcing Strategy](#) and any new resources would be requested through the multi-year budget. Ultimately, an annual operating increase of approximately \$293,000 will be required as the Master Plan is delivered.

Stormwater works on growth-driven road corridors are included in the Development Charges Background Study and would be funded primarily through development charges. Any shortfall in DC funding for growth projects and non-growth portion of capital projects as well as operating costs would be rate funded through the Stormwater Service Fee. The Stormwater Service Fee was introduced in 2017 and has since been an effective revenue source towards funding stormwater services with the goal of achieving financial sustainability of the service. The stormwater fee model is currently being reviewed and once complete, will be used to forecast the long-term rate impact of the Stormwater MP and provided to Council ahead of the multi-year budget.

---



## Report

### Project Background

The [Stormwater Management Master Plan \(SWM MP\)](#) builds on the first comprehensive City-wide [Stormwater Management Master Plan completed in 2012](#). The previous study identified several infrastructure upgrades, but the key takeaway was to establish a Stormwater Service Fee to build up the financial sustainability of the service. Since then, the Stormwater User Rate has been established, which allows the recommended projects and programs in the current master plan to proceed. The overarching study objective for the SWM MP is to develop a long-term plan for the effective management of stormwater runoff in existing and future conditions to 2051 in alignment with Official Plan Amendment (OPA) 80, including protection of infrastructure, roads, and property from flooding impacts, protection of our NHS, drinking water supply, and ecological sustainability of Guelph's rivers and streams, and while considering the impacts of Climate Change.

### Overview of the SWM MP

The study was initiated in 2020 and includes detailed technical study for six categories / types of stormwater management elements within the City's system. The project was undertaken as a Municipal Class Environmental Assessment (Class EA), fulfilling the appropriate regulatory requirements depending on the type of stormwater management elements (some studied to satisfy Schedule A/A+ - preapproved, and some studied to satisfy Schedule B requirements). Preferred alternatives were identified across each category of work to generate the preferred overall stormwater management program of works.

The SWM MP has completed technical studies and made recommendations to support the following study goals and objectives:

- 1. Improve water quality** – the SWM MP recommends a retrofit and maintenance program for existing stormwater management facilities to bring them to appropriate service levels that meet current practices. Additionally, new stormwater management facilities have been sited across the city to increase the area of the City's runoff that receives treatment prior to discharging to Guelph's waterways and Natural Heritage System (NHS). Design criteria have been updated to include distributed source control and conveyance control on roads and sites (Low Impact Development Measures (LIDs)) that will contribute to improved water quality. By improving the quality of our stormwater runoff, we are also contributing to improved downstream water quality that benefits the natural environment and protects drinking water supply for Guelph, our neighbouring municipalities, and Indigenous communities.
- 2. Integrate management of stormwater and drinking water** – an Infiltration Policy has been created in conjunction with Environmental Services that dictates where infiltration of stormwater into the ground is permitted and what type of runoff is permitted based on source water protection requirements. This is instrumental for developers, consultants, and City staff to be aligned and have a clear framework to implement.
- 3. Minimize threat of flooding** – the SWM MP recommends projects to increase capacity in our drainage system. This is important to minimize risks

to public health and safety, to protect our environment, and to protect our roads, infrastructure, and property in support of a thriving community. This includes work to upsize pipes as well as install LIDs that will help manage road runoff right at the source, which protects downstream infrastructure and reduces risk of flooding. Reporting of frequent drainage issues have been documented and used to prioritize pipe upsize locations. Criteria and policies are included to promote infiltration and evapotranspiration to prevent runoff from ever entering downstream systems.

4. **Protect, enhance, and restore natural features** – the SWM MP includes restoration projects for stream erosion sites and includes policy and criteria to protect habitats and property from erosion impacts. By implementing water quality measures natural environment protection will be improved.
5. **Improve infrastructure resiliency and climate change adaption** – by studying infrastructure under future imperviousness assumptions (more paved surfaces) and an adapted set of climate data (climate change adjusted rainfall parameters), the projects recommended in the SWM MP encompass resiliency and adaptability. Furthermore, the introduction of a distributed source control program (LIDs) provides further capacity in the system to manage different storms. Finally, certain LIDs provide drainage benefits that reduce impacts of freeze-thaw and reduce required de-icing (salt) volumes.
6. **Align policy and design criteria with Regulations** – during development of the SWM MP, the Ministry of Environment, Conservation and Parks (MECP) implemented new Regulations and design criteria associated with the Consolidated Linear Infrastructure Environmental Compliance Approval (CLI ECA). The recommended SWM MP Design Criteria and Infiltration Policy provides the Guelph-specific framework for private and public site and right-of-way construction activities to be undertaken in accordance with the new Provincial requirements.
7. **Implement a framework for prioritizing projects** – the Sub-watershed Health Analysis ranked the City’s sub-watersheds against a number of environmental and stormwater management factors to identify areas of the City with the poorest overall environmental health. This framework is used to prioritize stormwater management projects in areas with the most needs.

To meet these goals, the SWM MP recommends a portfolio of projects and programs over 2024-2051 as follows:

- Existing Stormwater Management Ponds (retrofits, cleanouts, maintenance)
- Existing Oil/Grit Separator Units (maintenance and cleanouts)
- Existing Pollution Prevention, O&M Practices (CB cleanouts, street sweeping, leaf pick-up)
- Watercourse Erosion Sites (new restoration projects)
- Stormwater Sewer Network (pipe upsize requirements)
- New Stormwater Management Facilities (Ponds, Subsurface Storage to improve water quality)

- Low Impact Development Implementation (including an assessment of appropriate infiltration locations based on source water protection requirements and an assessment of appropriate LID typologies for Guelph)
- Design Criteria (consolidated and updated design criteria to include a 5mm minimum volume control requirement and support the CLI ECA requirements)
- Innovation and climate change measures are incorporated throughout all aspects of the SWM MP.

A full summary of the process and programs identified as part of the recommended stormwater management strategy, including mapping, is included in the [Draft Project File Executive Summary](#).

## **Key Considerations**

### **OPA 80 & Growth to 2051**

The SWM MP included study and identification of future stormwater managements needs to support the City's growth to 2051, in alignment with OPA 80. This was done by estimating impervious (hard surface) ground cover based on land uses in OPA 80 and looking at how infill development has changed land cover over time. The future imperviousness was used in combination with the future climate change parameters (discussed below) to ensure planned infrastructure is future-ready.

### **Bill 23 Impacts**

Components of Bill 23 that are related to the SWM MP include the accelerated growth rate (and associated imperviousness) and the modification of planning approvals required for applications with 10 units or less (Site Plan Applications have specific stormwater management requirements, whereas Building Permits may not). Additionally, it threatens the extent to which wetlands, one of Guelph's greatest natural stormwater management assets, can be protected.

The SWM MP recommended projects are not expected to change significantly due to Bill 23; however, it may require the City to implement projects at a faster pace (the 2023-2041 horizon is accelerated to 2031). This impact will be addressed through the multi-year budget for 2024-2027 where resource and budgetary requirements from the SWM MP are incorporated. Ultimately, Bill 23 and the associated pace of growth will require monitoring and future update of the master plan, which will occur in the next planned 5-year cycle.

### **Climate Change**

One of the overarching objectives of the SWM MP is to plan resilient infrastructure for the future. The SWM MP incorporates climate change in the following ways:

- Designing infrastructure to handle larger and more frequent storms, including managing runoff at source (through the introduction of a Volume Control Target in Guelph). LIDs will be required to protect against flooding, preserve system capacity, and provide quality treatment. These also offer co-benefits including greenhouse gas reductions, heat mitigation through increased tree canopy, and provide better quality water to support aquatic habitat in receivers.
- Certain LID typologies allow rain to drain away from the road surface more quickly than traditional curb and gutter systems, which reduces risk of

damage to asphalt from freeze-thaw cycles, may reduce salt application, and may reduce winter maintenance.

- Natural assets will also be optimized to restore the full capacity of creeks and rivers, which are the City's largest defense against major flooding during storm events.

The technical elements of the SWM MP have also been inputs to the Climate Change Adaptation Plan (CCAP) that is currently under development and will also align with future updates to the City's Corporate Asset Management Plan with respect to climate change adaptation and resiliency. Through the CCAP, the projects and programs within the SWM MP have been identified as important mitigation tools.

### **Source Water Protection & Road Salt**

The Infiltration Policy has been developed in concert with Source Water Protection and Environmental Services staff that works to balance groundwater and NHS feature recharge needs with prevention of salt-laden stormwater runoff from impacting drinking water supplies. Specific requirements from detailed subwatersheds have been carried forward. The policy has been established in an iterative manner and provides guidance on what type of runoff is appropriate to infiltrate and where in the City infiltration is permitted based on WHPA levels.

### **Safety**

Safety concerns surrounding proposed surface features were raised during Public Consultation. As with any engineering design, public safety is paramount. Safety features such as fencing, vegetative buffers, appropriate grading and side slopes and signage are determined on a site-specific basis during detailed design. Improved safety through risk management and risk reduction is a key pillar of the SWM MP.

### **Equity**

Stormwater management projects have been identified across the city. The works have been prioritized based on their subwatershed health score, which included an evaluation of environmental health across several areas. Environmental health and stormwater level of service is considered part of the equity lens. Older areas of the city were built out with different levels of stormwater management criteria than today's practices. These older areas generally received poor subwatershed health scores and are therefore the top priority for project implementation. As future design progresses, staff will seek to balance environmental health with other priorities, while also working towards achieving a consistent stormwater level of service across the city.

Where other corridor works overlap with proposed works in the SWM MP, regardless of subwatershed health score, the projects will be aligned to realize efficiencies.

### **Consolidated Linear Infrastructure Environmental Compliance Approval (CLI ECA)**

The Ministry of Environment, Conservation and Parks has recently transitioned from approval of modifications to municipal stormwater system on a project-by-project basis, to pre-approval of the system-wide CLI ECA provided that stipulated requirements are adhered to. This includes requirements for property development and for road projects to a higher magnitude than previously required. Guelph has

received the completed CLI ECA and the SWM MP has created the framework for the requirements to be met through updated Design Criteria, the creation of an Infiltration Policy, and development of a LID Implementation Strategy.

## **Next Steps**

Projects and programs identified in the SWM MP will be captured, scheduled, and resourced through the development of the 2024-2027 multi-year budget (MYB) and capital forecast. Throughout this process, consideration will be given to the balance of staff and financial resourcing available and required to deliver the SWM MP capital and operational programs through an integrated programming and planning approach. The financial information from this project will also be referred to the ongoing Development Charges Background Study and rate study.

A key recommendation in the SWM MP is the development of a Monitoring Program that aligns with the requirements of the CLI ECA. This will be prioritized in 2024 to ensure compliance with the Provincial legislation.

The SWM MP will be updated at 5-year intervals.

## **Financial Implications**

The plan provides costs for capital works, programs, operations and maintenance, and new resources to implement the recommended stormwater management approach. It includes timelines to complete the works between 2024 and 2051 (the vision), however other organizational priorities must be considered in the context of all ongoing and proposed capital works across the city.

The current 25-yr capital budget includes \$210.4 million for stormwater management projects relevant to the SWM MP. The total additional cost above the projects already captured in the current 25-year capital budget is \$300.1 million. Project alignments within road corridors will be scheduled in alignment with asset management and other utility works in the corridor. The SWM MP projects will be incorporated into the 2024-2027 multi-year budget. If all projects are completed between 2024-2051, as the master plan suggests, this would be an additional \$11.1 million annually. However, the number of projects (and associated costs) forecasted for each year will be established through the multi-year budget process with consideration for impact to user rates and affordability, which means the costs are expected to be spread out beyond the 2051 timeframe. The MYB focuses on balancing all priorities throughout the city with a focus affordability, equity, and ability to deliver.

To implement the capital projects across the 2024–2051-time horizon, an annual operating budget impact of \$293 thousand will eventually be required beyond resource requirements previously forecast in the [Capital Program Resource Strategy](#). New resource requests will be included at the appropriate time in future multi-year budgets.

With respect to maintenance/operational financial and staff resourcing needs, most of the recommendations in the SWM MP include replacement/upsizing of infrastructure in existing alignments and retrofit works to existing facilities, with similar anticipated operational needs to the current condition, and as captured in the current operating budget.

The structure of dedicated stormwater resourcing requires refinement will be further studied through a SWM Utility Structure Benchmarking study.

## **Funding Sources**

Stormwater works on growth-driven road corridors are included in the Development Charges Background Study and would be funded primarily through development charges.

Any shortfall in DC funding for growth projects and non-growth portion of capital projects as well as operating costs would be rate funded through the Stormwater Service Fee. The Stormwater Service Fee was introduced in 2017 and has since been an effective revenue source towards funding stormwater services with the goal of achieving financial sustainability of the service. The stormwater fee model is currently being reviewed and once complete, will be used to forecast the long-term rate impact of the Stormwater MP and provided to Council ahead of the multi-year budget. All projected financial impacts would be prioritized and reviewed in the multi-year budget with the lens of affordability and equity while balancing the need to complete regulated works.

There are potential federal and provincial funding opportunities that could be leveraged to fund stormwater related projects. Staff are committed to exploring these opportunities including the federal Disaster Mitigation Adaptation Funding (currently open) and others that become available.

## **Consultations**

### **Internal Consultation**

Operations, Environmental Services, Parks, Planning and Building Services, Finance, Legal, Realty and Court Services, and Engineering and Transportation Services have been engaged on technical deliverables and policies throughout the process.

### **Community Stormwater Working Group**

A community stormwater working group was formed at the onset of the project. Members included representatives from the Grand River Conservation Authority, University of Guelph, Wellington Water Watchers, and other industry experts. The group met three times to discuss technical deliverables and provide feedback which has been incorporated into the study.

### **Accessibility Advisory Committee**

LIDs in the public realm (whether at public facilities or in roads) that have surface features (permeable pavement) were discussed with Guelph's Accessibility Advisory Committee (AAC) on October 18, 2022 to collect preliminary feedback on concerns associated with the different typologies. The City's Complete Streets Design Guideline project currently underway will use the AAC's feedback and return to the AAC with more detail as part of their review of right-of-way cross sections.

### **Guelph-Wellington Developers Association / Guelph Home Builders Association**

The emerging design criteria and policies from the SWM MP were presented to GWDA/GBHA on November 16, 2022. No feedback was received.

### **Indigenous Consultation**

Project notification has been provided to Mississaugas of the Credit First Nation (MCFN), Six Nations of the Grand River (SN), Metis, and the Haudenosaunee Confederacy Chiefs Council (through Haudenosaunee Development Institute) at the

project onset and in November 2022 in advance of the Public Open House. Notification will be provided for the study completion following direction from Council to finish the study.

Further, the City has met with MCFN and SN on water-related master plans (Water and Wastewater Servicing MP, SWM MP) in the fall of 2021. The overarching goal of the SWM MP includes improving water quality to waterways, which was appreciated during discussion. Commitments to engage during future preliminary and detailed project designs, particularly during archaeological investigations, were made.

### **Public Consultation**

Public Open House #1 was held virtually from October 28, 2020 to November 30, 2020. Participants were invited to complete a survey and mapping exercise that provided early inputs about stormwater management across the City. Feedback indicated that stormwater runoff is a serious concern and that residents were in general support of LIDs.

In the summer of 2022, the project team “popped up” at the Civic Museum during Fringe Fest, at Riverside Park during Rib Fest, and outside City Hall on a sunny Saturday to bring information about the SWM MP to where people were gathering. 142 participants were engaged and provided feedback about which stormwater management practices they would like to see addressed. The pop-ups were an exciting engagement opportunity to speak to Guelph’s youth – there was overwhelming support for increased environmental health and climate change mitigation measures, which are embodied in the SWM MP’s recommendations.

Public Open House #2 was held virtually and in person on November 28, 2022 with the commenting period extending to December 20, 2022 on ‘Have Your Say’. Feedback collected included support for the proposed end-of-pipe facilities in general, to support increased water quality treatment, and support for improved stormwater management in general. The team heard feedback related to detail around end-of-pipe facility projects and the level of engagement. All future projects will have additional engagement during preliminary and detailed design. For example, the City heard concern about Margaret Greene Park and the potential facility sited in the un-programmed south-east corner. The team prepared an FAQ that provided information on the design, safety, and future engagement opportunities.

### **Attachments**

None

### **Departmental Approval**

Reg Russwurm, P. Eng., MBA, Manager, Design and Construction

Mary Angelo, P. Eng., Manager, Development and Environmental Engineering

Karen Newland, Manager, Client Services and Budget

### **Report Author**

Colleen Gammie, P.Eng., PMP, Infrastructure Planning Engineer

**This report was approved by:**

Terry Gayman, P.Eng.

General Manager/City Engineer, Engineering and Transportation Services

Infrastructure, Development and Enterprise Services

519-822-1260 extension 2369

terry.gayman@guelph.ca

**This report was recommended by:**

Jayne Holmes, P.Eng., PMP

Deputy Chief Administrative Officer

Infrastructure, Development and Enterprise Services

519-822-1260 extension 2248

jayne.holmes@guelph.ca



# Staff Report



---

To	<b>Committee of the Whole</b>
Service Area	Infrastructure, Development and Enterprise Services
Date	Tuesday, April 4, 2023
Subject	<b>2022 Water Services' Annual Report and Summary Report</b>

---

## Recommendation

1. That Guelph City Council approve the 2022 Water Services' Annual Report and Summary Report.
- 

## Executive Summary

### Purpose of Report

The Water Services' Annual Report and Summary Report ("the report") is a compilation of information that demonstrates to the water system Owner (City Council) and all stakeholders the ongoing delivery of an adequate and safe supply of drinking water to customers serviced by the City of Guelph Drinking Water System (Guelph DWS) and the Gazer Mooney Subdivision Distribution System (Gazer Mooney SDS, located in the Township of Guelph/Eramosa).

This report satisfies the regulatory requirements of the [Safe Drinking Water Act](#) (SDWA) including the [Drinking Water Quality Management Standard](#) (DWQMS); and regulatory reporting required under [O. Reg. 170/03](#) – [Section 11](#) and [Schedule 22](#).

Through the report, the system owner, senior leaders, and customers are informed of the performance of Water Services for the period of January 1 to December 31, 2022.

Due to the regulatory requirements noted above, the Water Services' Annual Report and Summary Report are presented as a separate report from the Corporate Annual Report.

### Key Findings

In 2022, Water Services maintained its commitment of providing consumers in the City of Guelph and the Gazer Mooney subdivision in Guelph/Eramosa Township with a safe, consistent supply of high-quality drinking water while meeting or exceeding, and continually improving on, legal, operational, and quality management system requirements.

### Strategic Plan Alignment

This report is aligned with the Strategic Plan Priorities of Sustaining our Future by providing water in a sustainable way, Building our Future by maintaining and replacing water assets and Working Together for our Future through our collaborative approach to the delivery of water services.

## Financial Implications

All financial implications of the Report were included as part the Council approved 2022 Water Services Non-Tax Operating and Capital Budgets.

## Report

In satisfying the requirements of the [Safe Drinking Water Act \(2002\)](#), Water Services is pleased to present the 2022 Water Services' Annual Report and Summary Report for review and approval by the system Owner (City Council). Significant highlights of the report are described below. For Council and public reference, the complete reports are available for review at [Guelph.ca/water-testing](https://guelph.ca/water-testing).

Water Services works closely with the Ministry of the Environment, Conservation and Parks (MECP) and Wellington Dufferin Guelph Public Health (WDGPH) to maintain and continuously improve the drinking water system and ensure safe drinking water.

## Ministry of the Environment, Conservation and Parks Inspection Results

The 2022-2023 MECP R170 Inspection is ongoing, and an inspection score has not been obtained for the Guelph DWS or the Gazer Mooney SDS. Upon receipt of this report by end of Q1, any non-compliances identified through the inspection will be immediately corrected. For any issues that are identified, Water Services and Compliance & Performance will engage in a root-cause analysis process (RCA), where continual improvement measures are identified and implemented, and new policies and procedures may be created to prevent such issues of non-compliance from reoccurring.

Through ongoing conversations with the MECP Inspector staff do not expect any major compliance issues or concerns.

## Adverse Water Quality Incidents (AWQIs)

What is an AWQI? When something goes wrong with a Drinking Water System, the event may be referred to as an adverse drinking water quality incident (AWQI). An AWQI can be, but is not limited to, an adverse sample result, no free available chlorine (FAC) in a distribution system, or failure of a UV treatment device.

There was one AWQI in the Guelph Drinking Water System in 2022. The AWQI resulted in a non-compliance related to maintaining a secondary free chlorine residual above 0.05 mg/L in the distribution subsystem.

On September 07, 2022, Sample Station D0281 (Dawson Road) was sampled as part of the distribution subsystem microbiological sampling program and a chlorine residual of 0.00 mg/L was recorded. [O. Reg. 170/03](#) requires a minimum free chlorine residual of 0.05 mg/L in the distribution subsystem. Due to construction (watermain renewal) the Dawson Road watermain was cut and capped at Speedvale Ave., creating a dead-end which increased the water age, resulting in the adverse secondary disinfection residual. This area of the distribution system did not include any serviced customers. This location was added to the flushing program for the duration of the construction which resolved the issue, to maintain a secondary free chlorine residual.

## External Audit Results

The third-party external verification audit was completed virtually between November 21 and November 23, 2022, by NSF International Strategic Registrations. The auditor looked at 23 processes at Water Services and participated in a virtual facility tour. Accreditation to the DWQMS Version 2.0 was maintained.

The auditor noted that there continues to be strong evidence of ongoing commitment to the DWQMS at the City of Guelph. System strengths observed during the audit included:

- Team: Commitment and passion
- Staff engagement and participation in internal audit and Management Review
- Risk Assessment processes
- Continual Improvement
- DWQMS documentation: management review, risk assessments, internal audit
- Emergency response processes

Four (4) minor non-conformances were identified for the Guelph Drinking Water System. One (1) minor non-conformance was identified for the Gazer Mooney Subdivision Distribution System.

A root cause analysis was performed, and corrective action plan was submitted to the external DWQMS auditor for each non-conformance. The external DWQMS auditor accepted the submitted corrective action plans, except for one and additional information was required. The additional information was prepared and submitted to the auditor as requested.

Resolution of the identified non-conformance will occur at the next external DWQMS audit (October 2023), the external DWQMS auditor will follow-up to ensure that the corrective action plan that was submitted for each non-conformance has been effectively implemented.

The external DWQMS auditor recommended to NSF that Water Services accreditation to the DWQMS continue.

## Annual Water Services Management Review

Water Services conducts an annual Management Review, as required under the DWQMS. The Management Review meeting was conducted on February 15, 2023. Through the management review process, top management assess the continuing suitability, adequacy, and effectiveness of the QMS. The results of the management review, including any identified deficiencies, decisions and action items are reported to the Owner (Council). For more information, please see the Management Review meeting minutes appended to the [Summary Report](#).

## Water Efficiency Strategy Progress

The Council approved the 2016 [Water Efficiency Strategy](#) (WES) defined programs, policies, and resources to help the City meet reduction targets in average daily water production set-out in the 2014 Water Supply Master Plan. The [2022 WES Progress Report](#) outlines the individual program successes and the progress to-date in achieving the reduction target of 9,147 cubic metres in average daily production by 2038.

## Key Facts:

- Since the implementation of the 2016 WES, the cumulative water savings achieved to date is 1,470 cubic metres per day.
- The total water savings achieved for 2022 was 100.4 cubic metres per day, falling short of the annual target (629 cubic metres per day). Challenges included staffing gaps and transitions, and program activity reestablishment due to the COVID-19 pandemic
- Average daily residential water use in Guelph (166 L/person) decreased in 2021 and remains below the provincial (172 L/person) and national (215 L/person) averages. 2022 consumption data is not finalized in time to include in the annual report.
- In 2022, 561 residential rebate applications and audits were completed, two business upgrades were processed, and one significant facility upgrade resulting in water savings was completed. For more information on the individual water efficiency programs available, visit [guelph.ca/rebates](https://guelph.ca/rebates).
- Various indirect water savings programs, public outreach and education programs were also delivered to Guelph residents to motivate action around water conservation and efficiency.

## Municipal Drinking Water Licence

For Water Services to be the Operating Authority for the Guelph Drinking Water System, the Corporation is required to obtain and maintain a Municipal Drinking Water Licence. The Municipal Drinking Water Licence must be renewed every 5 years. Water Services' Municipal Drinking Water Licence is set for renewal in January 2024 and expires in July 2024.

There are five components that make up the license that must be in place. They are:

### 1. A Drinking Water Works Permit

The Drinking Water Works Permit is issued by the Ministry of the Environment, Conservation and Parks and provides a description of the overall water system, including treatment, storage, and distribution and will include, when applied for, an authority to alter the system in a specified way.

### 2. Permits to Take Water

A Permit to Take Water is required for any water takings in Ontario that exceed more than 50,000 L of water per day. The purpose of the Ministry's Permit to Take Water (PTTW) program is to ensure the conservation, protection, wise use and management of the waters of the province. Permits are controlled, and not issued if the taking of more water in a given area would adversely affect existing users or the environment. The requirements of the Permit to Take Water reflect the Ontario government's continuing efforts to safeguard the province's water supply and detailed information is requested about individual water takings so that Ontario's water resources may be protected for all users. The City of Guelph holds 18 permits to take water for our drinking water sources that have different requirements, including different pumping rates and required monitoring of the environment in the surrounding area.

### 3. An Operational Plan

An Operational Plan is a plan prepared in accordance with the Drinking Water Quality Management Standard (DWQMS) and is required under the Safe Drinking

Water Act. This plan documents Water Services' Quality Management System. To fulfill the requirements of the Municipal Drinking Water Licence, the Operational Plan must be endorsed by Council once per term. The updated Operational Plan will be brought to council in June 2023.

#### **4. The Operating Authority must be accredited**

For Water Services to be an Accredited Operating Authority, the City must be accredited to the Drinking Water Quality Management Standard. Water Services has been accredited since 2009.

To maintain our accreditation, every year we complete a comprehensive audit and review of the Operational Plan along with our programs and processes by an independent certified accreditation body that is appointed by the province. Water Services completed this audit in November 2022 and maintained accreditation to the Drinking Water Quality Management Standard, version 2.0.

#### **5. A Financial Plan**

The final requirement of the Municipal Drinking Water License is a long-range water financial plan as defined under [Ontario Reg 453/07](#) to advise the Owner of financial resources needed to sustain compliance and a fit state of repair of the water system.

As your operator representative, Water Services, Wastewater Services and Compliance & Performance staff are currently working to finalize the updated 2023 Water and Wastewater Long Range Financial Plan which will be brought before Council for deliberation and approval in the last quarter of 2023.

### **Financial Implications**

All financial implications of the Report were included as part of the Council approved 2022 Water Services' Non-Tax Operating and Capital Budgets.

### **Consultations**

Departmental consultation completed in support of the 2022 Water Services' Annual Report and Summary Report, include:

- Engineering and Transportation Services
- Planning and Building Services

### **Attachments**

Attachment-1 [2022 Water Services' Annual Report](#)

Attachment-2 [2022 Water Services' Summary Report](#)

Attachment-3 [2022 Water Efficiency Strategy Progress Report](#)

### **Departmental Approval**

Wayne Galliher, C.E.T., Division Manager, Water Services

Heather Yates, Acting Manager, Compliance and Performance

### **Report Author**

Kristin Pressey, Supervisor Compliance, Compliance and Performance

Deigh Madejski, Quality Management Specialist, Compliance and Performance

John-Paul Palmer, Water Compliance Specialist, Compliance and Performance

**This report was approved by:**

Nectar Tampacopoulos  
General Manager, Environmental Services  
Infrastructure, Development and Enterprise Services  
519-822-1260 extension 3599  
nectar.tampacopoulos@guelph.ca

**This report was recommended by:**

Jayne Holmes, P.Eng., PMP  
Deputy Chief Administrative Officer  
Infrastructure, Development and Enterprise Services  
519-822-1260 extension 2248  
jayne.holmes@guelph.ca

# Water Services: Standard of Care

Understanding your  
role in providing safe  
drinking water

# Agenda

---

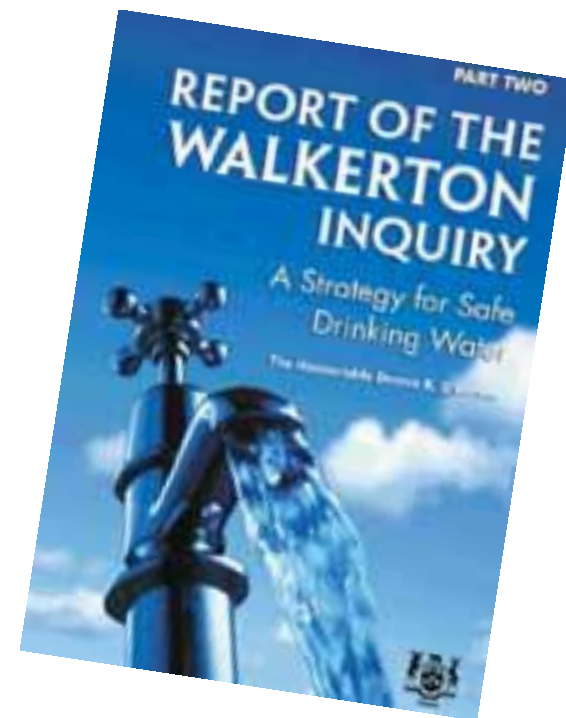
1. Standard of Care
2. Safe Drinking Water Act, 2002
3. Water Services Quality Policy
4. Drinking Water Treatment and Distribution
5. Effective Monitoring and Reporting
6. Municipal Drinking Water Licence
7. Financial & Infrastructure Planning
8. Managing the Risks to Drinking Water
9. Annual & Summary Reports



# Standard of Care

## Report of the Walkerton Inquiry, 2002

“Given that the safety of drinking water is essential for public health, those who discharge the oversight responsibilities of the municipality should be held to a statutory standard of care.”



- Justice Dennis O'Connor

# Standard of Care

---

## What is it?

- Under the *Safe Drinking Water Act (2002)*, as a municipal official, you must practice due diligence to protect public health when making decisions that could affect the drinking water.
- Severe penalties are possible for municipal officials who fail to act in good faith and do not exercise honesty, competence and integrity to ensure the protection and safety of the users of municipal drinking water systems.

# Standard of Care

## Things to remember: It's Your Duty

- It is your duty to ensure safe drinking water.
- It applies to those with decision-making responsibility for municipal drinking water systems or oversee the operating authority of the system.
- There are legal consequences for failing to carry out the duty, including possible fines or imprisonment.



# Standard of Care

---

## Things to remember: Be Informed

- You don't have to be an expert, but you need to be informed.
- You should be asking questions and getting answers.
- Seek advice from those with expertise and act prudently on their advice.

**You can rely on Water Services' expertise.**

**Nectar Tampacopoulos**  
General Manager  
Environmental Services  
519-822-1260 extension 3599  
[nectar.tampacopoulos@guelph.ca](mailto:nectar.tampacopoulos@guelph.ca)

**Wayne Galliher, C.E.T.,**  
Division Manager  
Water Services, Environmental Services  
519-822-1260 extension 2106  
[wayne.galliher@guelph.ca](mailto:wayne.galliher@guelph.ca)

# Standard of Care

---

## Things to remember: Be Vigilant



- Complacency can pose one of the greatest risks to drinking water systems.
- Never simply assume that all is well with the drinking water systems under your care.
- The health of your community depends on diligent and prudent oversight.

# Safe Drinking Water Act, 2002

---

## Section 11: Duties of Owners and Operating Authorities

- Provide water that meets all prescribed drinking water quality standards.
- Operate in accordance with the act and its regulations, and keep system in a fit state of repair.
- Ensure that drinking water system are appropriately resourced.
- Comply with all sampling, testing and monitoring requirements.
- Meet all reporting requirements, including annual reporting to the public.

# Safe Drinking Water Act, 2002

---

## Section 11: Actions required of owners and operating authorities

- Sampling and testing of drinking water.
- Using an accredited laboratory.
- Reporting of adverse test results that exceed any standards in the Ontario Drinking Water Quality Standards Regulation.
- Obtaining a drinking water licence, including a financial plan.
- Ensuring the drinking water system is operated by an accredited operating authority.
- Ensure management structures to maintain certified operators to operate the system.

# Safe Drinking Water Act, 2002

---

## Section 19: Your Duty and Liability

- Extends legal responsibility to people with decision-making authority over municipal drinking water systems and those that oversee the accredited operating authority for the system.
- You must exercise the level of care, diligence and skill with regard to a municipal drinking water system that a *reasonably prudent person* would be expected to exercise in a similar situation.
- You must act honestly, competently and with integrity.



# **Taking Care of Your Drinking Water:**

---

## **A Guide for Members of Municipal Councils**

What should I be Asking?

- What are the risks to public health?
- Are there any areas of risk that council needs to address?
- What checks and balances are in place to ensure the continued safety of our drinking water?
- Are we meeting our legislative and regulatory requirements?
- What is the public health impact or long-term cost of deferring this decision?

# Water Quality Policy

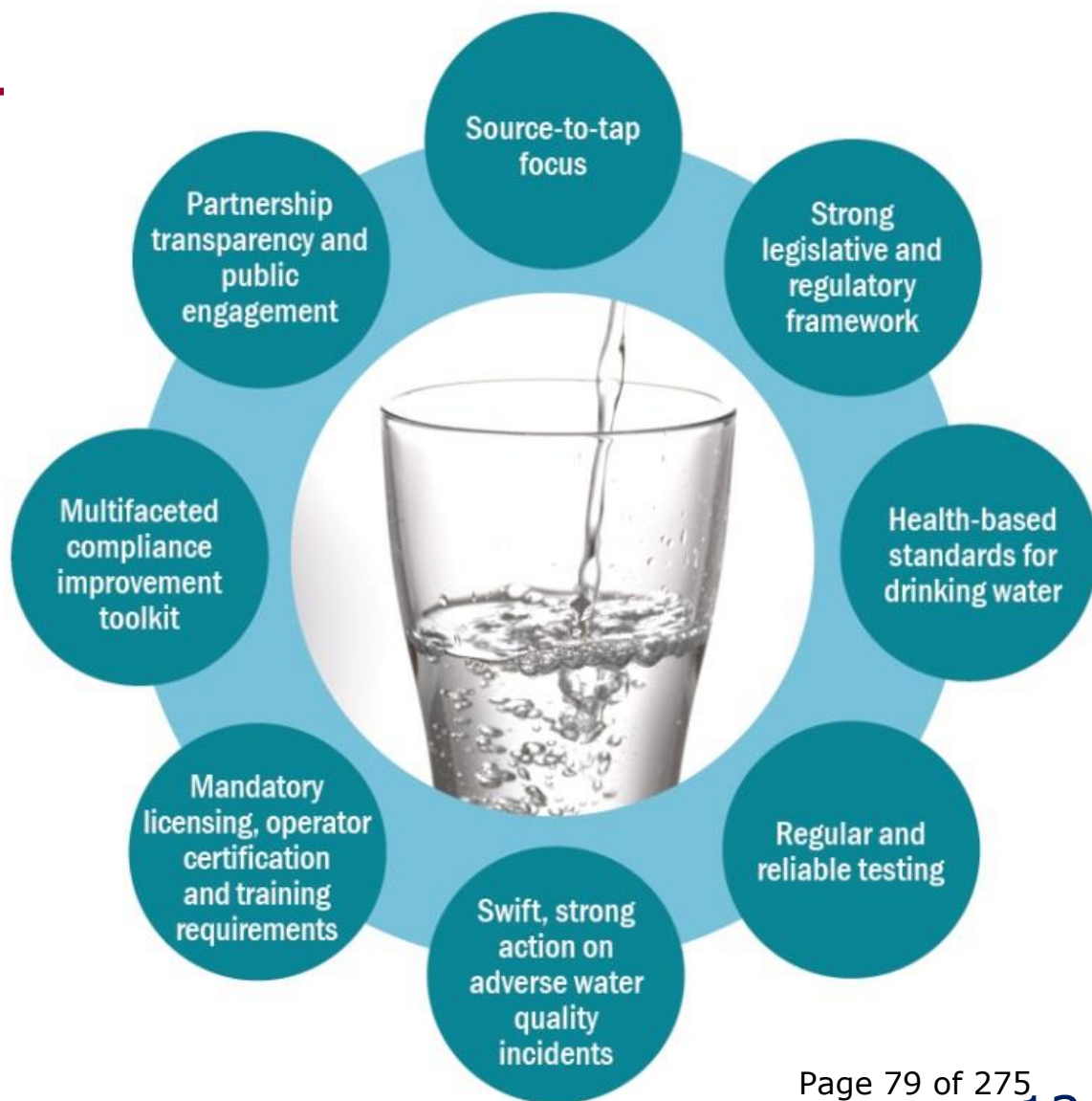
**Water Services at the City of Guelph is committed to providing consumers with a safe, consistent supply of high quality drinking water while meeting or exceeding, and continually improving on, legal, operational, and quality management system requirements.**

**Delivering your water with dedication, professionalism and care.**



# Protecting Ontario's Drinking Water

## Drinking water protection safety net



# Drinking Water Treatment

---

## Ensuring effective treatment

- Two sources of drinking water in Guelph:
  - True groundwater.
  - Groundwater under the direct influence of surface water with effective in-situ filtration.
- Water quality monitoring.
- Redundant equipment for major processes.
- Provincially certified operators.
- Proactive monitoring and treatment, where necessary.

# Drinking Water Distribution

---

## Ensuring water quality to every customer

- **Effective design and build of water infrastructure**
  - Proper sizing of watermains to meet community needs.
  - Planning for the future (water towers, new subdivisions).
  - Redundancy in the distribution system.
- **Effective operation**
  - Monitoring and maintaining pressure.
  - Remote monitoring and operational control.
  - Monitoring water quality.
  - Watermain cleaning program.
  - Leak detection and condition assessments.
- **Effective maintenance**
  - Timely response to breakdowns (leaks, mainbreaks, customer concerns).

# **Effective Monitoring & Reporting**

## **Adverse Water Quality Incident (AWQI) response**

- Immediate notifications when there is an adverse sample is required under the *Safe Drinking Water Act (2002)*:
  - Ontario Ministry of the Environment, Conservation and Parks (MECP) Spills Action Centre.
  - Wellington-Dufferin Guelph Public Health (WDGPH).
  - Owner (members of council).
- In 2022, there was one (1) adverse water quality incidents.
  - More information can be found in the Annual & Summary Reports: [Guelph.ca/water](https://guelph.ca/water) under the water quality tab.

# Compliance with Regulations

---

## MECP inspection results

- Our water system is inspected once per year.
- We work with the Ministry to improve our processes in order to ensure that we are delivering high quality drinking water.
- We complete monthly compliance audits (internally) to be aware of any issues prior to the inspections.

# Annual Report & Summary Report

---

## What they tell you about your system

- Description of the drinking water system and chemicals used.
- Summary of the results of required testing.
- Summary of any adverse test results.
- Description of any corrective actions.
- Description of any major expenses to install, repair or replace required equipment.
- Information about any requirements that were not met under the Safe Drinking Water Act.
- Description of measures taken to correct failures.
- Comparison of the system's flow rates from previous years to help assess existing and planned water use.



# Municipal Drinking Water Licence

---

## Approval to operate the Guelph Drinking Water System

The Municipal Drinking Water Licence requires these 5 components to be in place:

1. Drinking Water Works Permit
2. Permits to Take Water
3. Operational Plan
4. Accredited Operating Authority
5. Financial Plan

# Municipal Drinking Water Licence

---

## 1. Drinking Water Works Permit (DWWP)

- A permit describing current water system infrastructure and future alterations or upgrades to the water system.

## 2. Permit to Take Water (PTTW)

- A permit to take 50,000L or more of source water per day.
- Guelph has 18 permits to take water.

# Municipal Drinking Water Licence

---

## 3. Operational Plan

- A plan prepared in accordance with the Drinking Water Quality Management Standard (DWQMS) required under the Safe Drinking Water Act, 2002 that documents Water Services' Quality Management System.
- Endorsed by Council (owner of the system).

## 4. Accredited Operating Authority

- Water Services must be accredited to the DWQMS.
- This is done by a comprehensive audit and review of the Operational Plan by an independent certified accreditation body appointed by the Province.

# Municipal Drinking Water Licence

---

## 5. Financial Plan

- A long range financial plan developed to ensure the financial sustainability of the drinking water system.
- Required under O. Reg. 453/07.
- The Long Range Financial Plan is currently being updated and will be presented to Council by end of year 2023.

# Financial Planning

---

## Ensuring financial stability

- Imperative to ensure that your community continues to enjoy clean, safe drinking water.
- You have an important role to play in ensuring that appropriate resources are made available.
- Municipal councils have ultimate responsibility for approving financial plans that are prepared for the municipality.
  - Ensuring revenue collected will meet the needs of those services.
  - Life-cycle planning.
  - Asset management.

# Infrastructure Planning

---

## Ensuring there is sustainable drinking water infrastructure

- Machinery, equipment and structures.
- The Operating Authority must:
  - Annually review the drinking water infrastructure;
  - Provide a summary of the programs in place to maintain, rehabilitate and review the infrastructure; and
  - Monitor the effectiveness of its maintenance program.
- This is normally accomplished through the budget process.

# Managing the Risks to Drinking Water

## Risk Assessments



- An orderly methodology of identifying hazards or hazardous events that may affect the safety of drinking water and evaluating their significance.
- Identifies potential hazardous events facing your drinking water system i.e. main breaks, spills, assesses the impact and the control measures in place.
- “Adequate municipal funding is a key component of risk management.”

# Managing the Risks to Drinking Water

---

## Emergency planning for drinking water

- The Water Services Emergency Response Plan outlines how Water Services will respond to a drinking water emergency and how and when you will be notified.
- Plan developed in partnership with Corporate Emergency Management and with the support of Engineering and Transportation Services.
- Member of OnWARN:
  - Ontario Water/Wastewater Agency Response Network.
  - A province-wide network of “utilities helping utilities”.
  - Promotes emergency preparedness, disaster response, mutual aid and assistance for water and wastewater utilities.



# Thank you!

*Questions or Comments?*

**For more information:  
[guelph.ca/water](http://guelph.ca/water)**

# Staff Report



---

To	<b>Committee of the Whole</b>
Service Area	Public Services
Date	Tuesday, April 4, 2023
Subject	<b>Guelph Transit Fare Strategy</b>

---

## Recommendation

1. That the Kids Ride Free program (children aged 12 and under) outlined in Attachment 1, Section 6.3.2 to report "Transit Fare Strategy" dated April 4, 2023, be made permanent and that the budget impacts as outlined in report "Transit Fare Strategy" dated April 4, 2023, be included in the 2024-2027 Multi-year Budget.
  2. That the Fare Capping Loyalty program, outlined in Attachment 1, Section 6.3.1 to report "Transit Fare Strategy" dated April 4, 2023, be approved and that the budget impacts as outlined in report "Transit Fare Strategy" dated April 4, 2023, be included in the 2024-2027 Multi-year Budget.
  3. That staff be delegated the authority to proceed with the remaining initiatives recommended in Attachment 1 to report "Transit Fare Strategy" dated April 4, 2023.
- 

## Executive Summary

### Purpose of Report

This report summarizes the Guelph Transit Fare Strategy. The Fare Strategy is a comprehensive review and analysis of the fare system, including fare programs, policies, pricing, payment options, and structures, and recommends changes to modernize the fare system and incentivize ridership.

The Fare Strategy will be a foundational part of the Guelph Transit Business Plan, which was recommended through the [Guelph Transit Business Service Review](#). Implementing the Fare Strategy recommendations in partnership with the [Guelph Transit Future Ready Action Plan](#) (GTFRAP) will be key in achieving the City's goals to make transit more affordable, attractive, accessible, and equitable.

### Key Findings

The Fare Strategy provides 16 recommendations to update existing and introduce new fare policies, structure, pricing, payment options, and programs. These recommendations were developed to support the City's plans and strategies and are based on transit comparators, industry best practices, community engagement results, and emerging trends and technologies.

By approving the Fare Strategy, the City of Guelph is providing a simplified, affordable fare system that will reward frequent riders and incentivize ridership.

Approving these recommendations is also committing to achieving a transit mode share of 15 per cent by 2051 as the Fare Strategy will work in partnership with the GTFRAP to grow ridership.

## **Strategic Plan Alignment**

The Guelph Transit Fare Strategy aligns with most priorities of the Strategic Plan but is central to the Navigating our Future goal to “provide attractive, affordable, and reasonable transportation options for everyone.” The goals of this pillar are tracked through the key performance indicator of the “per cent change of non-auto mode share”. The Fare Strategy will contribute to achieving these goals by modernizing and simplifying the fare system while incentivizing ridership through the recommended fare programs, policies, pricing, and payment options.

## **Financial Implications**

The operating financial impact of the Fare Strategy in 2023 is \$5,200 in additional revenue. From 2024 to 2027 there will be an increase of \$151,900 for a total of \$157,100 in revenue which is partially offset by an increase in operating costs of \$75,400 resulting in an overall net reduction to the tax support of transit of \$81,700. If approved, these financial impacts would be included in the 2024-2027 multi-year budget. The largest driver of this impact is the Kids Ride Free Program with a net cost of \$155,100 which is made up of a revenue loss of \$117,000 and an operating cost of \$38,100 for a staffing resource.

The capital costs to implement fare capping, bank card fare payments, and self-service terminals is \$329,600 which would be funded out of Transit’s existing capital budget for EFMS enhancements (TC0076).

---

## **Report**

### **Background**

In 2019, the [Guelph Transit Business Service Review](#) was conducted to identify what Transit does well and what needs to change. The review recommended that a Guelph Transit Business Plan be developed in alignment with the [Transportation Master Plan](#) (TMP) to provide direction for transit service.

The [Guelph Transit Future Ready Action Plan](#) (GTFRAP) was approved by Council in 2021 and aims to deliver a more competitive, convenient, and reliable transit system that meets the community’s needs today and beyond, over the next decade. Together, the GTFRAP and the Fare Strategy will act as the foundation for the Business Plan. These plans will work towards growing ridership to achieve the TMP’s goal of a 15 per cent transit mode share by 2051.

The Guelph Transit Fare Strategy is a comprehensive review and analysis of the fare system, including fare programs, policies, pricing, payment options, and structures. Using best practices, industry standards, and community engagement results, staff have developed recommendations for changes to the fare system that will modernize policies and incentivize ridership.

The goal of the Fare Strategy is to meet the needs of customers today and in the future by creating an affordable, attractive, and convenient fare system. The Fare

Strategy will also enhance the customer experience by simplifying the fare system and incentivizing ridership.

## **Summary of review and analysis**

The Fare Strategy was built on a detailed analysis of the existing fare system, municipal comparators' practices, and public feedback on the fare system options. The analysis included reviewing existing City plans to ensure the resulting recommendations align with long-term goals.

Research was conducted on industry standards, best practices, and innovative fare system ideas. An evaluation of contextual applicability and financial feasibility was completed and used alongside the community engagement results to narrow down viable options. Staff carried out a more in-depth financial analysis for the selected options, and recommendations were developed and refined with assistance from Finance staff.

## **Summary of recommendations**

As a result of the review and analysis conducted, staff have compiled 16 recommendations that will update the fare system to be more attractive, accessible, and affordable for customers.

## **Fare policies**

### **1. OnYourWay fare cards**

All fare program users must have an OnYourWay fare card, except for U Pass users. New OnYourWay fare cards cost \$5 to purchase, unless otherwise specified, and replacement OnYourWay fare cards will cost \$5 for all users.

Eligible users of free specialty fare programs receive their first OnYourWay card free of charge. Users must renew their card every five (5) years. The following programs fall under this condition:

- CNIB card
- Veterans card
- Personal Assistant for Leisure Activities (PAL) card
- Retired Transit Operators' card
- Welcome to Guelph card (not eligible for renewal)

Eligible users of specialty discounted fare programs must renew their card annually. The following programs fall under this condition:

- City of Guelph Employee Pass
- Corporate Pass

### **2. Transfers**

The transfer time should always be equal to half of the longest route's cycle time, plus 15 minutes. Therefore, the transfer time should be maintained at 60 minutes.

### **3. Bus bay rentals**

The cost of renting a bus bay at Guelph Central Station will increase to \$770 per month per bus bay effective January 1, 2024, resulting in additional revenue of \$3,600 in 2024. The monthly bus bay rental rate will be reviewed annually and adjusted to keep pace with cost increases in the terminal budget.

### **4. Bus charters**

Bus charter rates will be reviewed and updated annually to match cost increases as outlined in the revenue budgeting policy.

## **5. Financial performance indicators**

A more holistic set of financial performance indicators, including the revenue to cost (R/C) ratio, that considers service levels and aligns with the revenue budgeting policy, should be adopted during the 2024-2027 multi-year budget. An annual review of the financial performance indicators will be conducted and measured against Guelph Transit's municipal comparators.

## **Fare programs**

### **1. Kids Ride Free program**

The Kids Ride Free program (children aged 12 and under) should be made permanent at an annual net budget impact of \$155,100. An operating budget in the amount of \$38,100 for clerical resources to support the program and a revenue loss of \$117,000 in 2024.

### **2. Corporate Pass program**

Transit staff will develop a new Corporate Pass program with an increase to budgeted revenue of \$18,700 in 2024. The existing program will be phased out and the new program will be launched in 2024.

### **3. Travel Training program**

Transit staff will develop a diverse Travel Training program to meet the needs of various groups, to be launched in 2024. The program will provide free rides to new customers taking part in the program (up to the value of a monthly pass). The program will be developed at no financial impact and will be offered by existing staff.

### **4. City of Guelph employee pass program**

Transit staff will work with Parking and Human Resources staff to enhance the user experience and expand the program so that all City employees are eligible, including casual part-time, co-op students, summer students, and contract employees.

City Hall staff, regardless of employment status, are eligible for a transit pass at 100 per cent discount; all other employees are eligible for a 50 per cent discount. The discounts are taxable benefits and are managed by Human Resources.

Based on historical enrollment in the program, it is assumed the program will continue to operate with minimal financial impact.

### **5. Fare Capping Loyalty program**

The traditional monthly pass program should be transitioned into a pay-as-you-go program, known as a Fare Capping Loyalty program, at a capital cost of \$36,300 funded from the existing capital budget (TC0076) and no operating budget impacts. The fare cap should be set at 34 rides for all fare categories.

If the Fare Capping Loyalty program is not approved, the monthly pass program should be maintained and prices should be increased to the proposed adult and concession fare cap maximum prices of \$95.20 and \$76.50, resulting in additional revenue of \$329,000.

## **6. TaxiSCRIP program**

The maximum number of taxiSCRIP coupon books that can be purchased each month should be increased from two to three. The minor additional cost of \$6,300 can be accommodated within the existing operating budget.

## **Fare structure and pricing**

### **1. Fare structure**

The flat fee age-based fare structure will be maintained, and the term concession fares will be adopted to refer to age-based discounts. All users eligible for concession fares will receive the same discount. These users are:

- Kids (if the Kids Ride Free program is not continued)
- Youth
- Post-secondary students
- Seniors

### **2. Fare pricing (September 2023)**

The cash fare will be increased from \$3.00 to \$3.25, and the debit/credit bank card fare will be introduced at the same rate as cash (\$3.25).

The adult single ride fare will be maintained at \$2.80. The concession single ride fare will be maintained at \$2.25 and will be expanded to include post-secondary students (except for the University of Guelph students).

The adult monthly fare cap should be set to 34 rides, amounting to a maximum of \$95.20 per month. The monthly concession fare cap should also be set to 34 rides, amounting to a maximum of \$76.50 per month. The day pass will be increased from \$8.00 to \$8.40, and the weekend pass will be eliminated.

### **3. Fare pricing methodology**

The adult single ride fare price will always be the price that all other fare media prices are based upon, except for cash fare. The single ride fare will be increased by approximately two per cent every year, rounded to the nearest \$0.05 increment. Should costs increase significantly, a greater per cent increase may be required to support the revenue budget policy.

Concession fares will always be 20 per cent less than an adult single ride fare, rounded to the nearest \$0.05 increment. The price of day passes will always be the equivalent of three adult single ride fares.

The cash fare will be increased in \$0.25 increments every two years. The debit and credit bank card fare will always be the same price as the cash fare.

All changes in prices will be aligned with the revenue budgeting policy.

## **Payment options**

### **1. Self-service terminals**

Three self-service terminals will be purchased for fare card reloading (by debit or credit card), at a cost of \$77,600 funded from the existing capital budget. The terminals will be installed at:

- ServiceGuelph at City Hall
- West End Community Centre
- Victoria Road Recreation Centre

An operating budget in the amount of \$2,900 annually, starting in 2024, be referred to the 2024-2027 multi-year budget.

## 2. Debit and credit fare payment

Debit and credit bank cards should be accepted on buses, at a cost of \$215,700 funded from the existing capital budget, pending a supportive business case. An operating budget in the amount of \$30,100 annually, starting in 2025, will be referred to the 2024-2027 multi-year budget.

### Next Steps

If approved, the goal is to begin implementation of fare pricing changes in September 2023 and implementation of fare programs and payment options in 2024 and 2025.

Once the implementation of the Fare Strategy recommendations has begun, Transit staff will monitor the performance of the fare system changes. The updated list of performance indicators will be used to conduct an annual review, and more frequent reviews as needed, to ensure Guelph Transit is meeting projections and staying on par with municipal comparators.

Staff will continue to collect public feedback to ensure the Fare Strategy stays relevant and changes will be made where needed and where possible.

### Financial Implications

#### Net operating costs

The operating financial impact of the Fare Strategy in 2023 is \$5,200 in additional revenue and between 2024 to 2027 is an increase of \$151,900 for a total of \$157,100 in revenue which is partially offset by an increase in operating costs of \$75,400 resulting in an overall net reduction to the tax support of transit of \$81,700. If approved, these financial impacts would be included in the 2024-2027 multi-year budget. The largest driver of this impact is the Kids Ride Free Program with a net cost of \$155,100 which is made up of a revenue loss of \$117,000 and an operating cost of \$38,100 for a staffing resource.

**Table 1. Estimated revenue from the implementation of the Fare Strategy recommendations.**

Revenue	2023	2024	2025	2026	2027
Fare pricing changes	\$5,200	\$10,200	\$52,100	\$121,500	\$51,500
Fare policies	-	\$6,100	\$2,100	\$2,100	\$2,100
Fare programs	-	\$(98,300)	\$1,600	\$400	\$500
<b>Total</b>	<b>\$5,200</b>	<b>\$(82,000)</b>	<b>\$55,800</b>	<b>\$124,000</b>	<b>\$54,100</b>

**Table 2. Estimated expenses from the implementation of the Fare Strategy recommendations.**

<b>Expense</b>	<b>2023</b>	<b>2024</b>	<b>2025</b>	<b>2026</b>	<b>2027</b>
Kids Ride Free program (staff support)	-	\$38,100	-	-	-
Operating impacts from capital	-	\$2,900	\$30,100	\$2,100	\$2,200
<b>Total</b>	<b>-</b>	<b>\$41,000</b>	<b>\$30,100</b>	<b>\$2,100</b>	<b>\$2,200</b>

### **Capital investments**

The capital costs to implement fare capping, bank card fare payments, and self-service terminals is \$329,600 which would be funded out of Transit's existing capital budget for EFMS enhancements (TC0076).

**Table 2. Capital costs of fare strategy projects.**

<b>Fare Strategy project</b>	<b>Capital cost</b>
Fare capping loyalty program	\$36,300
Bank card tapping farebox payments	\$215,700
Self-service reload terminals	\$77,600
<b>Total</b>	<b>\$329,600</b>

### **Staff resources**

Guelph Transit had previously forecasted the need for additional staff resources in 2024 and 2025. The Fare Strategy recommendations further support the need for these resources that will be referred to the 2024-2027 multi-year budget process.

### **Consultations**

The Fare Strategy recommendations resulted from municipal comparator consultations and community engagement. A survey was sent to Guelph's municipal comparator transit agencies. Members of the community could participate through online and in-person engagement opportunities. A comprehensive summary of engagement is included Attachment 1.

### **Attachments**

Attachment-1 Guelph Transit Fare Strategy Report

Attachment-2 Guelph Transit Fare Strategy Presentation



## **Departmental Approval**

Robin Gerus, General Manager, Transit Operations

## **Report Author**

Courtney McDonald, Manager, Transit Business Services

Karissa Matson, Transit Planning Specialist

## **This report was approved by:**

Robin Gerus

General Manager, Transit Operations

Public Services

519-822-1260 extension 3321

[robin.gerus@guelph.ca](mailto:robin.gerus@guelph.ca)

## **This report was recommended by:**

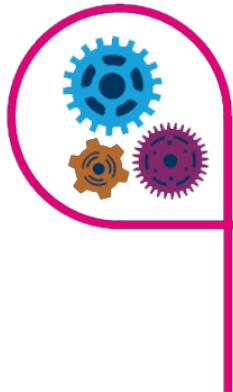
Colleen Clack-Bush

Deputy Chief Administrative Officer

Public Services

519-822-1260 extension 2588

[colleen.clack-bush@guelph.ca](mailto:colleen.clack-bush@guelph.ca)



# Guelph Transit **Fare Strategy**

On your way to a fare future

## Contents

Executive summary .....	8
Introduction .....	8
Process.....	8
Key reasons for the Fare Strategy.....	9
Existing fare system .....	9
Guelph plans and strategies .....	9
Fare Strategy recommendations .....	10
Fare policies .....	10
Fare programs.....	11
Fare structure and pricing .....	12
Payment options .....	13
Financial summary .....	13
Net operating costs .....	13
Capital investments .....	14
Staff resources .....	14
Next steps .....	14
1. Introduction .....	16
1.1 Project objectives .....	16
1.1.1 Main objective.....	16
1.1.2 Supporting objectives.....	17
1.2 Process and timeline .....	17
1.2.1 Research and data collection .....	17
1.2.2 Analysis and evaluation .....	18
1.2.3 Refinement and finalizing recommendations.....	18
2. Transit and the City of Guelph .....	18
2.1 Guelph Transit Business Service Review, 2019 .....	19
2.2 Guelph Transit Future Ready Action Plan, 2021-2031 .....	19
2.3 Transportation Master Plan .....	20
2.4 City's Strategic Plan, 2019-2023 .....	21
Navigating our future .....	21

Powering our future.....	21
Sustaining our future.....	21
Working together for our future .....	22
2.5 Envision Guelph: Guelph’s Official Plan (2018) .....	22
2.6 A United Vision: Guelph’s Community Plan (2018).....	22
2.7 Parking Master Plan and Downtown Parking Study .....	23
2.8 Revenue budgeting policy .....	23
3. Policy framework .....	24
3.1 Ontario Ministry of Transportation Transit Supportive Guidelines ....	24
3.1.1 Affordability .....	24
3.1.2 Convenience .....	25
3.1.3 Programs and incentives.....	26
3.1.4 Changing demographics .....	26
3.2 Ontario Ministry of Transportation Transit Technology Toolkit.....	27
3.2.1 Fareboxes.....	27
3.2.2 Smart cards and automated fare collection systems .....	27
3.2.3 Ticket vending machines.....	28
3.2.4 Mobile ticketing .....	28
3.3 Accessibility for Ontarians with Disabilities Act (AODA), 2005.....	28
3.4 Summary of comparator practices .....	30
3.5 Summary of case studies and best practices .....	30
4. Summary and evaluation of the existing fare system.....	30
4.1 Fare policies .....	31
4.1.1 Fare categories and eligibility .....	31
4.1.2 OnYourWay fare cards.....	32
4.1.3 Retailers selling fare media .....	32
4.1.4 Fare disputes .....	33
4.1.5 Bus charters .....	34
4.1.6 Areas with no set policies .....	35
4.2 Fare structure .....	35
4.2.1 Fare prices.....	36

4.2.2	Day passes .....	36
4.2.3	Transfers .....	37
4.3	Fare programs .....	38
4.3.1	Kids Ride Free program .....	38
4.3.2	Personal Assistant for Leisure activities (PAL) card .....	39
4.3.3	CNIB Pass.....	40
4.3.4	Veterans Transit Pass .....	40
4.3.5	Retired Transit Operators Pass .....	41
4.3.6	Corporate Pass program .....	42
4.3.7	Travel Training program .....	43
4.3.8	Mobility services taxiSCRIP program .....	44
4.3.9	City of Guelph Employee Pass program .....	44
4.3.10	Community event sponsorships .....	45
4.3.11	U Pass program .....	46
4.3.12	GO Transit Co-fare program .....	46
4.3.13	Community Investment programs.....	46
4.4	Fare payment options .....	47
4.4.1	Cash .....	47
4.4.2	OnYourWay fare card .....	48
4.4.3	Mobile app .....	48
4.4.4	Transfers .....	48
4.4.5	U Pass .....	48
4.4.6	QR tickets.....	48
4.4.7	Specialty cards .....	48
5.	Updated policies .....	48
5.1	Fare categories and eligibility.....	49
5.2	OnYourWay fare cards .....	50
5.2.1	Retail locations .....	50
5.2.2	Fare card conditions .....	50
5.2.3	Fare media .....	51
5.3	Retailers' selling fare media .....	51

5.4	Fare disputes .....	52
5.5	Bus bay rentals .....	53
5.6	Special event pricing.....	53
6.	Fare Strategy proposals .....	53
6.1	Proposed fare structure .....	54
6.1.1	Transfers .....	54
6.2	Fare pricing .....	54
6.2.1	Cash fare.....	54
6.2.2	Concession fares.....	55
6.2.3	Single ride fare (e-ticket).....	55
6.2.4	Day pass .....	55
6.2.5	Monthly fare capping.....	56
6.2.6	Fare pricing structure .....	56
6.3	Proposed fare programs .....	58
6.3.1	Fare Capping Loyalty program.....	58
6.3.2	Kids Ride Free program .....	60
6.3.3	Corporate Pass program .....	61
6.3.4	Travel Training program .....	62
6.4	Continuation of existing fare programs.....	63
6.4.1	Required fare programs.....	63
6.4.2	CNIB Pass.....	64
6.4.3	Veterans Transit Pass .....	64
6.5	Proposed fare payment options .....	64
6.5.1	Debit/credit tapping .....	65
6.5.2	Self-service terminals.....	65
6.6	Performance indicators.....	66
7.	Financial impacts .....	67
7.1	Net cost .....	68
7.2	Capital investments .....	68
7.3	Staff resources.....	69
7.3.1	Fare Media Coordinator .....	69

7.3.2	Transit Technologist .....	69
7.3.3	Clerical Staff .....	70
8.	Looking to the future .....	70
9.	Next steps .....	71
9.1	Fare Strategy recommendations .....	71
9.1.1	Fare policies .....	71
9.1.2	Fare programs .....	72
9.1.3	Fare structure and pricing .....	74
9.1.4	Payment options .....	74
9.2	Implementation steps .....	75
9.3	Monitoring process .....	76
9.4	Conclusions .....	76
Appendix A: Definitions .....		77
Appendix B: Comparator transit agencies .....		78
1.	Fare review and strategy examples .....	78
1.1	Barrie Transit .....	78
1.2	Burlington Transit .....	79
1.3	GOVA Transit .....	80
1.4	Kingston Transit .....	84
1.5	Thunder Bay Transit .....	86
1.6	Transit Windsor .....	86
2.	Fare Comparison .....	89
3.	Survey .....	90
Appendix C: Case studies and best practices .....		97
1.	Case studies .....	97
1.1	TransLink, Metro Vancouver, British Columbia, Canada .....	97
1.2	Public Transport Council, Singapore .....	100
1.3	Transport for New South Wales, Australia .....	101
1.4	Kansas City Area Transportation Authority, Kansas City, Missouri and Kansas, USA .....	104
1.5	Edmonton Transit Service, Edmonton, Alberta, Canada .....	105

1.6	GO Transit, Ontario, Canada .....	107
1.7	Payment option best practices .....	108
2.	Evaluation of viability.....	110
Appendix D: Public engagement results summary.....		114
1.	Introduction.....	114
2.	Purpose and scope .....	114
3.	Method .....	114
3.1	Surveys.....	114
3.2	Open houses and intercepts.....	115
3.3	Virtual workshops.....	116
4.	Results.....	116
4.1	Respondents .....	116
4.2	Survey responses .....	116
4.3	Open house and intercept responses.....	151
4.4	Virtual workshops.....	157
5.	Conclusions .....	165



# Executive summary

## Introduction

The Guelph Transit Future Ready Action Plan (GTFRAP) was approved by Council in 2021 and aims to deliver a more competitive, convenient, and reliable transit system that meets the community's needs today and beyond, over the next decade. Together, the GTFRAP and the Fare Strategy will act as the foundation for the Guelph Transit Business Plan.

The Guelph Transit Fare Strategy is a comprehensive review and analysis of the fare system, including fare programs, policies, pricing, payment options, and structures. Using best practices, industry standards, and community engagement results, staff have developed recommendations for changes to the fare system that will modernize policies and incentivize ridership.

The goal of the Fare Strategy is to meet the needs of customers today and in the future by creating an affordable, attractive, and accessible fare system. The Fare Strategy will also enhance the customer experience by providing a simplified fare structure, implementing new fare programs, and offering new payment options.

## Process

The Fare Strategy was built on a detailed analysis of the existing fare system, municipal comparators practices, and public feedback on the fare system options. The analysis included reviewing existing City plans to ensure the resulting recommendations align with long-term goals. The following details the streams of information used in creating this document:

- **Municipal comparators:** Guelph Transit's fare system was reviewed against that of nine Council-approved municipal comparator transit agencies in Ontario. Information on the comparators' fare systems was gathered via the Canadian Urban Transit Association's (CUTA) annual data, online research, and surveys/conversations with staff.
- **Case studies:** Staff researched other transit agencies from around the world that exemplify best practices, innovative fare programs, and unique fare structures. The contextual applicability and financial feasibility were assessed for each example in terms of viability for implementation in Guelph.
- **Community engagement:** Feedback was sought from the public through a range of online and in-person techniques. These techniques

included surveys, workshops, question and answer forums, open houses, and intercept activities.

## **Key reasons for the Fare Strategy**

### **Existing fare system**

Guelph Transit's existing fare system includes multiple operating policies, a fare structure with identified fare categories, various payment options, and several fare programs. However, there are clear gaps in policies, fare categories, and eligibility requirements. Additionally, there are payment options and fare programs that could be explored to modernize the fare system, attract ridership, and make full use of the new electronic fare management system (EFMS).

### **Guelph plans and strategies**

Guelph plans and strategies identify transit as integral to moving throughout the City. The goals of many of these plans aim to increase the transit modal share and get people out of cars which the Fare Strategy will contribute to when paired with the GTFRAP.

Many of these plans also focus on providing equitable, affordable, and accessible transit options. The recommendations of the Fare Strategy will further support these initiatives.

Specifically, in terms of the City's Strategic Plan, the Fare Strategy will help to achieve goals under the following pillars:

- **Navigating our future:** The Fare Strategy will encourage transit ridership and contribute to achieving modal share goals.
- **Sustaining our future:** The Fare Strategy will indirectly contribute to reduced greenhouse gas emissions that contribute to climate change by incentivizing ridership to reduce the number of vehicles on the road.
- **Powering our future:** The Fare Strategy will strengthen Transit's existing relationships and build more collaborative partnerships with businesses through new fare programs.
- **Working together for our future:** The Fare Strategy recommendations are the result of exploring new funding options and partnerships to ease taxes for residents and businesses.

# **Fare Strategy recommendations**

As a result of the review and analysis conducted, staff have compiled 16 recommendations that will update the fare system to be more attractive, accessible, and affordable for customers.

## **Fare policies**

### **1. OnYourWay fare cards**

All fare program users must have an OnYourWay fare card, except for U Pass users. New OnYourWay fare cards cost \$5 to purchase, unless otherwise specified, and replacement OnYourWay fare cards will cost \$5 for all users.

Eligible users of specialty free fare programs receive their first OnYourWay card free of charge. Users must renew their card every five (5) years. The following programs fall under this condition:

- CNIB card
- Veterans card
- Personal Assistant for Leisure Activities (PAL) card
- Retired Transit Operators' card
- Welcome to Guelph card (not eligible for renewal)

Eligible users of specialty discounted fare programs must renew their card annually. The following programs fall under this condition:

- City of Guelph Employee Pass
- Corporate Pass

### **2. Transfers**

The transfer time should always be equal to half of the longest route's cycle time, plus 15 minutes. Therefore, the transfer time should be maintained at 60 minutes.

### **3. Bus bay rentals**

The cost of renting a bus bay at Guelph Central Station will increase to \$770 per month per bus bay effective January 1, 2024, resulting in additional revenue of \$3,600 in 2024. The monthly bus bay rental rate will be reviewed annually and adjusted to keep pace with cost increases in the terminal budget.

### **4. Bus charters**

Bus charter rates will be reviewed and updated annually to match cost increases as outlined in the revenue budgeting policy.

### **5. Financial performance indicators**

A more holistic set of financial performance indicators, including the revenue to cost (R/C) ratio, which considers service levels and aligns with the

revenue budgeting policy, should be adopted during the 2024-2027 multi-year budget. An annual review of the financial performance indicators will be conducted and measured against Guelph Transit's municipal comparators.

## **Fare programs**

### **1. Kids Ride Free program**

The Kids Ride Free program (children aged 12 and under) should be made permanent at an annual net budget impact of \$155,100. An operating budget in the amount of \$38,100 for clerical resources to support the program and a revenue loss of \$117,000 in 2024.

### **2. Corporate Pass program**

Transit staff will develop a new Corporate Pass program with an increase to budgeted revenue of \$18,700 in 2024. The existing program will be phased out and the new program will be launched in 2024.

### **3. Travel Training program**

Transit staff will develop a diverse Travel Training program to meet the needs of various groups, to be launched in 2024. The program will provide free rides to new customers taking part in the program (up to the value of a monthly pass). The program will be developed at no financial impact and will be offered by existing staff.

### **4. City of Guelph employee pass program**

Transit staff will work with Parking and Human Resources staff to enhance the user experience and expand the program so that all City employees are eligible, including casual part-time, co-op students, summer students, and contract employees.

City Hall staff, regardless of employment status, are eligible for a transit pass at 100 per cent discount; all other employees are eligible for a 50 per cent discount. The discounts are taxable benefits and are managed by Human Resources.

Based on historical enrollment in the program, it is assumed the program will continue to operate with minimal financial impact.

### **5. Fare Capping Loyalty program**

The traditional monthly pass program should be transitioned into a pay-as-you-go program, known as a Fare Capping Loyalty program, at a capital cost of \$36,300 funded from the existing capital budget (TC0076) and no operating budget impacts. The fare cap should be set at 34 rides for all fare categories.

If the Fare Capping Loyalty program is not approved, the monthly pass program should be maintained and prices should be increased to the

proposed adult and concession fare cap maximum prices of \$95.20 and \$76.50, resulting in additional revenue of \$329,000.

## **6. TaxiSCRIP program**

The maximum number of taxiSCRIP coupon books that can be purchased each month be increased from two to three. The minor additional cost of \$6,300 can be accommodated within the existing operating budget.

## **Fare structure and pricing**

### **1. Fare structure**

The flat fee age-based fare structure will be maintained, and the term concession fares will be adopted to refer to age-based discounts. All users eligible for concession fares will receive the same discount. These users are:

- Kids (if the Kids Ride Free program is not continued)
- Youth
- Post-secondary students
- Seniors

### **2. Fare pricing (September 2023)**

The cash fare will be increased from \$3.00 to \$3.25, and the debit/credit bank card fare will be introduced at the same rate as cash (\$3.25).

The adult single ride fare will be maintained at \$2.80. The concession single ride fare will be maintained at \$2.25 and will be expanded to include post-secondary students (except for the University of Guelph students).

The adult monthly fare cap should be set to 34 rides, amounting to a maximum of \$95.20 per month. The monthly concession fare cap should also be set to 34 rides, amounting to a maximum of \$76.50 per month.

The day pass will be increased from \$8.00 to \$8.40, and the weekend pass will be eliminated.

### **3. Fare pricing methodology**

The adult single ride fare price will always be the price that all other fare media prices are based upon, except for cash fare. The single ride fare will be increased by approximately two per cent every year, rounded to the nearest \$0.05 increment. Should costs increase significantly, a greater per-cent increase may be required to support the revenue budget policy.

Concession fares will always be 20 per cent less than an adult single ride fare, rounded to the nearest \$0.05 increment. The price of day passes will always be the equivalent of three adult single ride fares.

The cash fare will be increased in \$0.25 increments every two years. The debit and credit bank card fare will always be the same price as the cash fare.

All changes in prices will be aligned with the revenue budgeting policy.

## **Payment options**

### **1. Self-service terminals**

Three self-service terminals will be purchased for fare card reloading (by debit or credit card), at a cost of \$77,600 funded from the existing capital budget. The terminals will be installed at:

- ServiceGuelph at City Hall
- West End Community Centre
- Victoria Road Recreation Centre

An operating budget in the amount of \$2,900 annually, starting in 2024, be a referred to the 2024-2027 multi-year budget.

### **2. Debit and credit fare payment**

Debit and credit bank cards should be accepted on buses, at a cost of \$215,700 funded from the existing capital budget, pending a supportive business case. An operating budget in the amount of \$30,100 annually, starting in 2025, will be referred to the 2024-2027 multi-year budget.

## **Financial summary**

### **Net operating costs**

The operating financial impact of the Fare Strategy in 2023 is \$5,200 in additional revenue and between 2024 to 2027 is an increase of \$151,900 for a total of \$157,100 in revenue which is partially offset by an increase in operating costs of \$75,400 resulting in an overall net reduction to the tax support of transit of \$81,700. If approved, these financial impacts would be included in the 2024-2027 multi-year budget. The largest driver of this impact is the Kids Ride Free Program with a net cost of \$155,100 which is made up of a revenue loss of \$117,000 and an operating cost of \$38,100 for a staffing resource.

**Table 1. Estimated revenue from the implementation of the Fare Strategy recommendations.**

<b>Revenue</b>	<b>2023</b>	<b>2024</b>	<b>2025</b>	<b>2026</b>	<b>2027</b>
Fare pricing changes	\$5,200	\$10,200	\$52,100	\$121,500	\$51,500
Fare policies	-	\$6,100	\$2,100	\$2,100	\$2,100
Fare programs	-	\$(98,300)	\$1,600	\$400	\$500
<b>Total</b>	<b>\$5,200</b>	<b>\$(82,000)</b>	<b>\$55,800</b>	<b>\$124,000</b>	<b>\$54,100</b>

**Table 2. Estimated expenses from the implementation of the Fare Strategy recommendations.**

<b>Expense</b>	<b>2023</b>	<b>2024</b>	<b>2025</b>	<b>2026</b>	<b>2027</b>
Kids Ride Free program (staff support)	-	\$38,100	-	-	-
Operating impacts from capital	-	\$2,900	\$30,100	\$2,100	\$2,200
<b>Total</b>	<b>-</b>	<b>\$41,000</b>	<b>\$30,100</b>	<b>\$2,100</b>	<b>\$2,200</b>

## **Capital investments**

The capital costs to implement fare capping, bank card fare payments, and self-service terminals is \$329,600 which would be funded out of Transit's existing capital budget for EFMS enhancements (TC0076).

**Table 3. Capital costs of Fare Strategy projects.**

<b>Fare Strategy project</b>	<b>Capital cost</b>
Fare capping loyalty program	\$36,300
Bank card tapping farebox payments	\$215,700
Self-service reload terminals	\$77,600
<b>Total</b>	<b>\$329,600</b>

## **Staff resources**

Guelph Transit had previously forecasted the need for additional staff resources in 2024 and 2025. The Fare Strategy recommendations further support the need for these resources that will be referred to the 2024-2027 multi-year budget process.

## **Next steps**

With the City of Guelph rapidly growing and changing, a mode share shift is necessary to accommodate the travel needs of a larger population. Paired with the GTFRAP, the Fare Strategy will help build ridership to meet mode share targets set out in the Transportation Master Plan (TMP) and the DC study. The Fare Strategy supports the City's plans, strategies and policies that aim for transit to be affordable, accessible, and equitable. The

recommendations outline the actions that Guelph Transit should take to achieve these goals while modernizing the fare system and making transit a more attractive mode of transportation.

The Guelph Transit Fare Strategy is being provided to the City of Guelph Council for its consideration and support to move forward with the implementation of the Fare Strategy recommendations.

1. That the Kids Ride Free program (children aged 12 and under) outlined in Attachment 1, Section 6.3.2 to report PS-2023-102 be made permanent and that the budget impacts as outlined in report PS-2023-102 be included in the 2024-2027 Multi-year Budget.
2. That the Fare Capping Loyalty program, outlined in Attachment 1, Section 6.3.1 to report PS-2023-102, be approved and that the budget impacts as outlined in report PS-2023-102 be included in the 2024-2027 Multi-year Budget.
3. That staff be delegated the authority to proceed with the remaining initiatives recommended in Attachment 1 to report PS-2023-102.

If approved, the goal is to begin implementation of fare pricing changes in September 2023 and implementation of fare programs and payment options in 2024 and 2025.

Once the implementation of the Fare Strategy recommendations has begun, Transit staff will monitor the performance of the fare system changes. The updated list of performance indicators will be used to conduct an annual review, and more frequent reviews as needed, to ensure Guelph Transit stays aligned with City goals and stays on par with municipal comparators.

Staff will continue to collect public feedback to ensure the Fare Strategy stays relevant and make changes where needed and where possible.



# **1. Introduction**

In 2019, the Guelph Transit Business Service Review was conducted to identify what transit does well and what needs to change. The review recommended that a Guelph Transit Business Plan be developed in alignment with the Transportation Master Plan (TMP) to provide direction for transit service.

The Guelph Transit Future Ready Action Plan (GTFRAP) was approved by Council in 2021 and aims to deliver a more competitive, convenient, and reliable transit system that meets the community's needs today and beyond, over the next decade. Together, the GTFRAP and the Fare Strategy will act as the foundation for the Business Plan. These plans will work towards growing ridership to achieve the TMP's goal of a 15 per cent transit mode share by 2051.

The Guelph Transit Fare Strategy is a comprehensive review and analysis of the fare system, including fare programs, policies, pricing, payment options, and structures. Using best practices, industry standards, and community engagement results, staff have developed recommendations for changes to the fare system recommendations that will modernize the fare system and incentivize ridership.

The goal of the Fare Strategy is to meet the needs of customers today and in the future by creating an affordable, attractive, and convenient fare system. The Fare Strategy will also enhance the customer experience by providing a simplified fare structure, implementing new fare programs, and offering new payment options.

The Fare Strategy will ensure Guelph Transit is future ready by working to meet the City's goals, particularly under the Strategic Plan pillar of "Navigating our future."

## **1.1 Project objectives**

To guide the development of the Fare Strategy, the following main and supporting objectives were identified.

### **1.1.1 Main objective**

Create a detailed Fare Strategy to guide fare programs, policies, pricing, payment options, and structure that will work with the GTFRAP to set the course for Guelph Transit over the next 10 years.

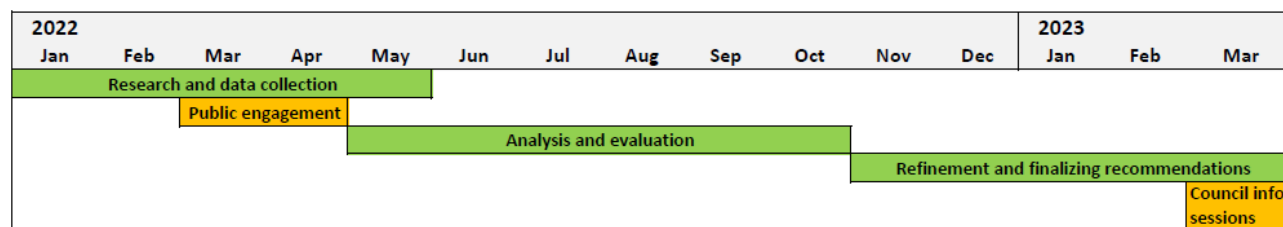
The resulting plan should align with City goals and focus on affordability, attractiveness, convenience, reliability, equity, and accessibility for customers.

### 1.1.2 Supporting objectives

To achieve the main objective, the following supporting objectives were identified as key outcomes of the Fare Strategy.

- Explore and implement fare incentive programs and partnerships to increase ridership.
- Reward existing riders and attract new riders with fare programs.
- Update Guelph Transit's fare structure and pricing to be on par with municipal comparators.
- Create a fare pricing methodology and schedule based on best practices.
- Update and implement fare system policies to fill gaps and modernize existing policies.
- Explore and implement convenient payment options.
- Introduce a more holistic set of financial performance indicators that considers service levels and aligns with the revenue budgeting policy and industry standards.
- Align with existing City plans, including the Strategic Plan, Community Plan, and Transportation Master Plan.
- Work in partnership with the Guelph Transit Future Ready Action Plan.

## 1.2 Process and timeline



**Figure 1. Timeline for the development of the Fare Strategy.**

### 1.2.1 Research and data collection

The development of the Fare Strategy began with the research and data collection phase that took place from January to May 2022. During this phase, research was conducted on industry standards, best practices, and innovative fare system ideas. Information was collected from municipal comparators on their fare systems and additional case study transit agencies were identified.

Additionally, the public engagement campaign was held from March 21 – April 10, 2022, in which community members could voice their opinions on the fare system via online surveys, online workshops, online question and answer forums, in-person open house sessions, and/or in-person intercept activities. More information on the community engagement methodology and results can be found in

Self-service reload kiosks	Yes	Likely	<ul style="list-style-type: none"> <li>• Added option for reloading fare cards</li> <li>• Popular option in community engagement</li> <li>• Possibly reduce staff resources needed for reloading</li> </ul>
----------------------------	-----	--------	---

Appendix D: Public engagement results summary.

### **1.2.2 Analysis and evaluation**

The next phase of developing the Fare Strategy was the analysis and evaluation of data collected. This phase took place from May to October 2022. During this phase, an analysis of the community engagement results occurred to determine which fare system options the public is in favour of or not in favour of.

An initial evaluation of the fare programs, structure, and payment options identified in comparator and case study transit agencies also occurred to determine what may be contextually applicable and financially feasible for Guelph.

Once the community engagement analysis and initial evaluation were completed, the fare system options were narrowed down to viable options only, and an in-depth financial analysis was conducted.

### **1.2.3 Refinement and finalizing recommendations**

The last phase of developing the Fare Strategy was the refinement and finalization of recommendations, which took place from November 2022 until March 2023. This phase involved the review and refinement of options selected in the previous phase so the final Fare Strategy recommendations could be determined.

The recommendations were reviewed and refined with the assistance of Finance and Communications staff. The recommendations were then presented to Councillors via small workshops to help identify and answer questions prior to the final presentation to Council.

The complete Fare Strategy report was in progress throughout all phases along with the development of the Staff report in this final phase.

## **2. Transit and the City of Guelph**

Key City documents were examined to direct Guelph's fare system goals to meet the needs of the community in the short- and long-term. The documents examined include *Guelph Transit Business Service Review (2019)*; *Guelph Transit Future Ready Action Plan, 2021-2031*; *Guelph Transportation Master Plan (2022)*; *City's Strategic Plan, 2019-2023*; *Envision Guelph: Guelph Official Plan (2018)*; *A United Vision: Guelph's Community Plan*; *Parking Master Plan (2015)*; *Downtown Parking Study (2023)*; and the revenue budgeting policy. The impact of each of these documents on the Fare Strategy are outlined below.

### **2.1 Guelph Transit Business Service Review, 2019**

The [Guelph Transit Business Service Review](#) was approved by Council in 2019 and provided 12 recommendations around staffing and service level changes, service standards, funding and fare pricing guidelines, and investigating the viability and feasibility of new technology options.

One of the recommendations moved by council was to "[set] a funding and fare pricing policy based on a target net revenue to cost (R/C) ratio of between 40 and 45 per cent to support service and ongoing service improvements while reducing the potential financial impacts to customers."

A review of the fares did not occur as part of the Business Service Review; however, it represented the need to conduct a review. This has resulted in the completion of the Fare Strategy to not only review fares but conduct a more holistic analysis of the fare system.

Together, the GTFRAP and the Fare Strategy will function as the foundation for the Guelph Transit Business Plan, which the Business Service Review also identified a need for.

### **2.2 Guelph Transit Future Ready Action Plan, 2021-2031**

The [Guelph Transit Future Ready Action Plan](#) (GTFRAP) was approved by council in 2021 and aims to deliver a more competitive, convenient, and reliable transit system that meets the community's needs today and beyond, over the next decade. The GTFRAP outlines the future transit network that

resulted from a comprehensive route review of the existing transit system and from community engagement.

One of the recommendations moved by Council was “that the Revenue to Cost (R/C) ratio targets for fare increases from the 2019 Transit Business Service Review be paused until the completion of the upcoming Transit Fare Strategy.” As part of the Fare Strategy, methodology for how and when fare increases should occur has been researched by looking at municipal comparators, industry standards, and financial metrics captured by CUTA. Recommendations for determining fare pricing and increases have been outlined in this report.

In addition, the industry standard is that, in total, all else being equal, a 3 per cent increase in fare prices will reduce ridership by 1 per cent. However, as the Future Ready Action Plan will increase service levels and provide service expansion, fare increases are generally more accepted when users can see that their money is going towards creating a better transit network.<sup>1</sup>

The Fare Strategy along with the GTFRAP will provide the foundation for the future Guelph Transit Business Plan.

## **2.3 Transportation Master Plan**

The [Transportation Master Plan](#) (TMP) was approved by council in 2022 and aims to achieve a safe, efficient, and reliable transportation system for everyone.

The vision of the TMP is that “transportation in Guelph will be safe, equitable, sustainable, complete, affordable, and supportive of land use.” Equity focuses on making transportation geographically equitable so people can complete their trips comfortably, regardless of if they own a vehicle. Sustainability focuses on minimizing the negative impacts of a person’s trip on the environment. Affordability focuses on making transportation affordable for the user and making the most financially efficient use of our investments.

Regarding transit specifically, the goals include making transit “more convenient and simpler to understand” as well as “[promoting] transit as a mode of travel - desirable, affordable, and environmentally sustainable.” The Fare Strategy will simplify the fare system and play a key role in making transit sustainable and affordable for residents of Guelph.

---

<sup>1</sup> [Transit Fare Policy: An International Best Practices Review for Metro Vancouver](#)

Paired with the Guelph Transit Future Ready Action Plan, the Fare Strategy will help to achieve the TMP goal of making transit service competitive to driving and reduce greenhouse gas emissions toward net zero. Specifically, new fare programs with the future network changes will increase ridership and help reach the 2051 mode share target for transit of 15 per cent.

## **2.4 City's Strategic Plan, 2019-2023**

The [Strategic Plan](#) establishes the areas of focus over the coming years that reflect community goals. The Strategic Plan identifies five key pillars:

- Powering our future – an economy that empowers us
- Sustaining our future – an environment that sustains us
- Navigating our future – a transportation network that connects us
- Working together for our future – a modern government that works with us
- Building our future – a community that supports us

While transit is central to the “Navigating our future” pillar, the Fare Strategy also aligns with the “Powering our future” pillar, “Sustaining our future” pillar, and the “Working together for our future” pillar.

### **Navigating our future**

The main goals of this pillar are to “foster easy, accessible movement” in the community and to “provide attractive, affordable, and reasonable transportation options for everyone.” The Fare Strategy aims to assess the existing fare system and recommend changes as well as new policies and programs to provide attractive and affordable transit options. By doing so, the Fare Strategy will encourage transit ridership and contribute to achieving the key performance indicator of increasing the “per cent change of non-auto mode share” under this pillar.

### **Powering our future**

Under this pillar, a main goal is to “help businesses to succeed and add value to the community.” The Fare Strategy will improve and enhance the Corporate Pass program that will allow businesses to support their staff by partially subsidizing their employees’ bus passes. This will strengthen Transit’s existing relationships and build more collaborative partnerships with businesses that could result in future benefits, such as businesses sponsoring events and/or participating in the adopt-a-stop program.

## **Sustaining our future**

A key goal under this pillar is to “respond to climate change and prepare Guelph for a net-zero-carbon future.” The Fare Strategy aims to incentivize ridership through providing new fare programs and making transit an affordable mode of transportation. This will indirectly contribute to reduced greenhouse gas emissions that contribute to climate change by reducing the number of vehicles that are on the road.

## **Working together for our future**

The goal to “develop a long-term financial and resource strategy that is achievable and affordable” is located under this pillar. The Fare Strategy aligns with this goal as it has “[explored] new funding options, service-delivery models and partnerships to ease taxes for residents and businesses.” The recommendations of the Fare Strategy are a result of this exploration.

## **2.5 Envision Guelph: Guelph’s Official Plan (2018)**

The [Official Plan](#) is prepared for the City of Guelph in accordance with the Ontario Planning Act, Growth Plan for the Greater Golden Horseshoe, and Provincial Policy Statement. It establishes a vision, guiding principles, strategic goals, objectives, and policies for Guelph; promotes long-term community sustainability and public interest in the future development of the city; and guides decision-making and community building to 2031.

Several sections within the Official Plan specifically identify policies related to transit fares. Section 5.1.1(i) identifies a modal share increase for transit to 15 per cent by 2031, and Section 5.3.2(iii) for TDM measures includes encouraging transit pass initiatives.

The Fare Strategy will contribute to increasing modal share by introducing new fare programs, including transit pass initiatives, which will encourage ridership and increase the modal share for transit.

## **2.6 A United Vision: Guelph’s Community Plan (2018)**

The [Community Plan](#) lays the foundation for Guelph’s community vision and values. Through consultation, the plan identified seven broad themes:

- We are home
- We protect our environment
- We create value

- We are community
- We feel well
- We play and explore
- We move around freely

The final theme of “We move around freely” is central to transportation within a community. Within the vision of this theme, it is stated that, “Transit is a priority – it’s frequent and it’s affordable ... Increased use of transit and active transportation routes help address the traffic congestion that can follow rapid growth.” The strategic direction of this theme is to ensure that transit is available to all, inclusive of ability and exceptionality, and is well-connected. The Fare Strategy will play a key role in meeting the “affordable” component of this theme.

The theme of “We are community” is also a goal central to the Fare Strategy as the vision states that, “Everyone in Guelph is included and treated fairly and equitably.” Specifically, the Fare Strategy aims to “take a holistic view to consider and improve the interconnectedness of systems” and ensure that “our systems, practices, services, policies and governance structures are free from racism and other barriers to access.” The proposed policies, pricing, and programs under the Fare Strategy were created using a holistic and equitable approach to ensure inclusion of all Guelph residents.

The Fare Strategy will work in partnership with the Future Ready Action Plan and Transportation Master Plan to achieve the Community Plan goals together.

## **2.7 Parking Master Plan and Downtown Parking Study**

While the [2015 Parking Master Plan](#) aims to incentivize transit usage, the Downtown Parking Study is currently underway, which will provide an update to the Parking Master Plan to encourage transit use in the downtown even more than before. Guelph Transit has been working with this team to identify areas where parking and fare policies can align to mutually work towards the City’s modal share goal as well as Strategic Plan goals. A mutual goal is to align the plans to make transit a more attractive option when travelling downtown.

## **2.8 Revenue budgeting policy**

The revenue budgeting policy will be presented to Council in March 2023. The goal of the policy is to manage all revenue sources sustainably and



responsibly and ensure revenue is applied consistently through the corporate budgeting process. This policy promotes the ongoing review of user fees to ensure that they are reflective of the City’s policy objectives and approved cost recovery ratios are maintained.

The decision matrix outlined below assists staff in determining what type of funding a service should receive. Staff have assigned transit services to the “mixed service / partially tax supported” category, which has been bolded in Table 4.

**Table 4. Revenue budgeting policy decision matrix.**

<b>Funding Category</b>	<b>Who Benefits</b>	<b>Type of Service</b>	<b>Cost Recovery Ratio Guidance</b>
General service / fully tax supported	Community	General	0% to 5% (primarily taxes)
<b>Mixed service / partially tax supported</b>	<b>Primarily the community</b>	<b>General/ Individual</b>	<b>5% to 50% (primarily taxes, some user fees)</b>
Mixed service / partially tax supported	Primarily the individual	Individual/ General	50% to 95% (primarily user fees, some taxes)
Private service / non-tax supported	Individual benefit only	Individual	95% to 100% (primarily user fees)

### 3. Policy framework

Every transit agency and city are different, but there are several common characteristics of successful transit systems that have been identified by many sources. This section provides an overview of the industry best practices and policies that have guided the Fare Strategy recommendations.

#### 3.1 Ontario Ministry of Transportation Transit Supportive Guidelines

The [Transit Supportive Guidelines](#) are based on transit-friendly land-use planning, urban design, and operational best practices. They are designed to

help transit professionals create an environment that supports public transit and promotes transit ridership.

These guidelines detail methods for transit agencies to attract and retain ridership. The fare strategies section aims to make transit more affordable and easier to use through providing fare incentives, simplifying fare structures, and introducing more convenient payment options.

### **3.1.1 Affordability**

The following strategies were identified by the guidelines for ensuring affordability.

- Make fares more affordable by providing reduced base fares, free transfers, free fare zones or discounts for multi-ride tickets and passes.
- Transfers can be simplified by offering short-term, unlimited, and not directionally restricted ride passes to encourage transit use for quick errands.
- A day pass that is priced at the equivalent of two or three linked trips can also help to improve rider convenience, minimize fare administration, and minimize rider-operator arguments regarding transfer validity.

### **3.1.2 Convenience**

The following strategies were identified by the guidelines for ensuring convenience.

#### **Smart fare cards**

- Implement automatic fare collection systems (smart cards) to improve fare payment convenience and efficiency.
- Expand fare card distribution and reloading options. This can be achieved by selling fare media at more retail locations or transit stops and implementing reloading by cell phone or internet.
- To encourage the use of pre-paid fare cards, offer discounts relative to cash or tickets.
- Account-based automatic recharging of smart cards can provide additional convenience for busy commuters.
- Program smart cards so that they automatically charge the lowest applicable fare. This can help to ease decision making and increase passenger desire to ride.
- The use of pre-paid fare cards can reduce boarding times, thereby improving transit speed and reliability while providing transit agencies with the benefits of improved revenue control and the financial

advantage of receiving payment before the cost of providing service is incurred.

### **Integrated fare policy**

- Establish a regional integrated fare policy and collection system to allow riders to travel seamlessly on different transit systems across a single region.
- Integrated fare strategies include free transfers between systems, discounted fares between systems or use of a common fare card to increase the convenience and affordability of public transit.

### **3.1.3 Programs and incentives**

The following strategies were identified by the guidelines for encouraging ridership with fare programs and incentives.

#### **Partnerships**

- Partner with employers, universities, retail stores, and organizations to offer fare incentives or integrated fare payment options and programs.
- Establish partnerships with retail stores or shopping centres to provide free or reduced fares to or from their services, or store discounts upon presentation of a transit ticket or pass. This alleviates the need for additional parking, provides riders a means of avoiding parking and congestion, and serves as a promotional tool for transit.
- Consider partnerships with special events and tourist destinations to provide free or reduced fares. This alleviates the parking and congestion concerns, provides convenience to tourists and eventgoers, and serves as a promotional tool for transit.
- Reduce single occupant vehicle use by partnering with parking to set hourly parking prices that exceed or equal transit fares.

#### **Incentives**

- Offer loyalty points or partner with a loyalty program, such as a reward miles program so that riders are rewarded for each transit trip they take or given an incentive for accessing certain services.
- Consider fare incentives and programs such as a U-Pass system. U-Passes provide all students and staff with access to free or affordable transit fares and are an excellent opportunity to increase transit ridership.

#### **Promotion and education**

- Develop special promotions, such as Transit Week, theme days, information sessions, community discussions, raffles, fare-free days, and other activities to raise transit awareness.

### **3.1.4 Changing demographics**

The following strategies were identified by the guidelines for recognizing demographic trends and planning to adapt transit services to meet the lifestyle and travel needs of a changing population.

#### **Aging population**

- Due to reduced physical capabilities, many older people find using public transit difficult. To meet the needs of the growing number of elderly people, consider providing lower off-peak fares for seniors.

#### **Newcomers**

- Given the greater propensity of new immigrants to use transit and the fact that immigration is a major source of population growth in large centres, immigrants represent an important market for transit agencies. To capture ridership from new immigrants, consider providing transit training to inform new users about transit options, fares and system use, with content tailored to immigrant populations.

#### **Families and Youth**

- There is a growing trend towards more children and youth travelling by automobile than in previous decades which is contributing to lower activity levels within that age group. Car travel has replaced children and youth walking, cycling, and riding transit. Transit can be made better for traveling with children and more attractive to youth by offering discounted fares or free transit for younger age groups and/or offering timed transfers to enable multiple stops on one fare.

## **3.2 Ontario Ministry of Transportation Transit Technology Toolkit**

The [Transit Technology Toolkit](#) aims to help small and medium-sized transit systems navigate the emerging landscape of transit technologies to determine which ones may be a good fit. The Toolkit covers technologies that may be beneficial across all departments of a transit system, including fare collection systems, which is of particular importance to the Fare Strategy.

### **3.2.1 Fareboxes**

Fareboxes are a staple on public transit as they enable the collection of various fare media before or after boarding. Many transit systems use electronic fareboxes that count the fare payments as they are made. As fare collection increasingly moves towards cashless and ticketless systems via the use of smart cards and mobile payments, some transit systems have

simplified their farebox by returning to traditional gravity-based drop boxes to reduce cash maintenance requirements.

Both types of fareboxes are appropriate for medium-sized transit systems; however, simpler fareboxes make the most sense for agencies that have modern fare collection systems, like smart fare cards.

### **3.2.2 Smart cards and automated fare collection systems**

Automated fare collection systems (AFCS) help simplify the payment process for customers by using fare card readers to conduct transactions quickly using preloaded fares. This system also allows transfers to be automatically loaded on fare cards after the initial fare has been paid, eliminating the requirement for a paper transfer. Not only do AFCS expand fare payment options, but they can improve the overall transit experience for customers by reducing boarding times and ensuring higher service efficiency.

Most medium-sized transit agencies have deployed options such as smart fare cards and mobile ticketing via AFCS.

### **3.2.3 Ticket vending machines**

Ticket vending machines (TVMs) allow users to purchase fare media using a self-serve machine with an ATM-like interface. TVMs are convenient for customers because they allow for simple, fast, and safe transactions. These machines can improve the user experience with increased autonomy and interactivity.

Medium-sized transit agencies should consider implementing TVMs at major inter-modal points or hubs with high foot traffic.

### **3.2.4 Mobile ticketing**

Mobile ticketing apps have emerged as stand-alone fare payment options as well as part of broader AFCS. Customers can use a mobile app to purchase valid fares and then use the device to either show the operator a valid fare has been paid or to scan the device on the farebox to conduct a transaction. If the mobile ticketing app is part of a broader AFCS, the app can be connected to a central account to manage and track customer preferences, usage, etc. Mobile ticketing can also contribute to faster boarding times.

Many medium and large-sized transit services provide an app for customers to utilize mobile ticketing.

### **3.3 Accessibility for Ontarians with Disabilities Act (AODA), 2005**

The [AODA](#) establishes accessibility standards for information, communication, and transportation, among other areas. Of particular importance to transit agencies is Part IV of the Act, Transportation Standards.

The following are relevant policies under Part IV of the Act.

#### **s. 6 Self-service kiosks**

Without limiting the generality of section 5, the Government of Ontario, Legislative Assembly and designated public sector organizations shall incorporate accessibility features when designing, procuring or acquiring self-service kiosks. O. Reg. 191/11, s. 6 (1).

Large organizations and small organizations shall have regard to the accessibility for persons with disabilities when designing, procuring or acquiring self-service kiosks. O. Reg. 191/11, s. 6 (2).

In this section, “kiosk” means an interactive electronic terminal, including a point-of-sale device, intended for public use that allows users to access one or more services or products or both. O. Reg. 191/11, s. 6 (5).

#### **s. 38 Fares, support persons**

No conventional transportation service provider and no specialized transportation service provider shall charge a fare to a support person who is accompanying a person with a disability where the person with a disability has a need for a support person. O. Reg. 191/11, s. 38 (1).

#### **s. 46 Fares**

No conventional transportation service provider shall charge a higher fare to a person with a disability than the fare that is charged to a person without a disability where the person with a disability uses conventional transportation services, but a conventional transportation service provider may charge a lesser fare for a person with a disability. O. Reg. 191/11, s. 46 (1).

#### **s. 66 Fare parity**

Where a transportation service provider provides both conventional transportation services and specialized transportation services, the transportation service provider shall ensure that there is fare parity between conventional transportation services and specialized transportation services. O. Reg. 191/11, s. 66 (3).

Where a transportation service provider provides both conventional transportation services and specialized transportation services, the transportation service provider shall ensure that the same fare structure is applied to conventional transportation services and specialized transportation services. O. Reg. 191/11, s. 66 (5).

Where a transportation service provider provides both conventional transportation services and specialized transportation services, the transportation service provider shall ensure that the same fare payment options are available for all transportation services, but alternative options shall be made available to persons with disabilities who cannot because of their disability use a fare payment option. O. Reg. 191/11, s. 66 (6).

### **3.4 Summary of comparator practices**

Research was conducted to gather more information on the programs and policies that Guelph Transit's municipal comparators have in place through a Fare Strategy or similar plan.

The prices of all comparators' fare products were analyzed as well to get a better understanding of where Guelph lies in terms of current pricing.

A survey was sent to all municipal comparators in March 2022 to get a better understanding of the industry standards they use as well as what policies, programs, and payment options they have in place.

For more details on the comparator transit agencies research and analysis, see Appendix B: Comparator transit agencies

### **3.5 Summary of case studies and best practices**

Aside from the policies and programs used by Guelph Transit's municipal comparators, examples of best practices and unique fare systems from transit agencies around the world were explored. These case studies included fare strategies such as:

- Distance-based and zone-based fare structures
- Monthly passes and fare capping
- Ridership incentives and fare programs
- Innovative payment options
- Promotional programs

All strategies were evaluated for financial feasibility and contextual applicability. Those that were the most viable were used to develop the Fare Strategy recommendations.

For more details on the case studies that were explored to aid in developing the Fare Strategy, see Appendix C: Case studies and best practices

## **4. Summary and evaluation of the existing fare system**

Guelph Transit's existing fare system includes multiple operating policies, a fare structure with identified fare categories, various payment options, and several fare programs. However, there are clear gaps in policies, fare categories, and eligibility requirements. Additionally, there are payment options and fare programs that could be explored to modernize the fare system, make transit more affordable, attract ridership, and make full use of the new EFMS.

The following section summarizes the existing 2023 fare structure, policies, programs, and payment options as well as evaluates the strengths, issues, and opportunities of each where applicable. The fare system was reviewed and assessed to focus on improvements that can be made to enhance fare equity, accessibility, and affordability as well as improve the customer experience through the clear communication of eligibility and policies.

### **4.1 Fare policies**

#### **4.1.1 Fare categories and eligibility**

Currently, there are four fare category groups which are defined as follows.

##### **Child**

A "child" is anyone aged 12 years old and under. An OnYourWay fare card is required for those aged 5-12 years old.

##### **Youth**

A "youth" is anyone aged 13 to 17 years old, or those aged 18 and older that are in full-time attendance at high school. Government issued ID or proof of high school enrollment is required.

##### **Adult**

An "adult" is anyone aged 18 to 64 years old.

##### **Senior**

A "senior" is anyone aged 65 years of age or older. Government issued ID must be shown upon request.



**Table 5. Fare categories strengths, issues, and opportunities.**

<b>Strengths</b>	<b>Issues</b>	<b>Opportunities</b>
<ul style="list-style-type: none"> <li>Clearly defines who fits into what category.</li> <li>Explains eligibility for each category.</li> </ul>	<ul style="list-style-type: none"> <li>“Child” encompasses all children aged 12 and under when there are different eligibility requirements for children under the age of 5 years old than those aged 5 to 12 years old.</li> </ul>	<ul style="list-style-type: none"> <li>Split the “child” category into “child” for children under the age of 5 years old and “kid” for those aged 5 to 12 years old.</li> </ul>

#### 4.1.2 OnYourWay fare cards

OnYourWay fare cards can currently be purchased at any of the 11 retailers or 10 City facilities throughout Guelph. All locations allow for the purchase of an adult fare card as no proof of eligibility is required.

13 of the 21 locations that fare media can be purchased at have blank cards available, which can be assigned to a reduced fare category. Reduced fare cards can be purchased and registered at ServiceGuelph in City Hall or at the Guelph Transit office. The remaining eight locations only have adult fare cards available for purchase.

All locations allow for the reloading of fare cards, regardless of the category the fare card is registered to, or fare cards can be reloaded online at [onyourwayreload.guelph.ca](http://onyourwayreload.guelph.ca).

Fare cards for age-based fare categories, even reduced fare cards, cost \$5 to purchase. Speciality fare programs provide the cards for free once eligibility has been confirmed. If a fare card has been lost, regardless of the fare category or program the card is registered with, there is a \$5 replacement fee.

**Table 6. OnYourWay fare card fee policy strengths, issues, and opportunities.**

<b>Strengths</b>	<b>Issues</b>	<b>Opportunities</b>
<ul style="list-style-type: none"> <li>Outlines the cost of an OnYourWay card, replacement fees, where fare cards can be purchased, and eligibility requirements.</li> </ul>	<ul style="list-style-type: none"> <li>Does not clearly state which fare categories and programs are required to pay for an OnYourWay card.</li> </ul>	<ul style="list-style-type: none"> <li>Amend the policy to clarify what programs are required to purchase an OnYourWay fare card.</li> </ul>

### 4.1.3 Retailers selling fare media

Customers can reload fare cards online, through the mobile app, or in person at City facilities or retailers. While most customers reload online, providing options for reloading in person is important for providing equitable access to transit.

There are currently 11 retail locations across the city where residents can purchase and/or reload an OnYourWay fare card. These retailers, their hours, accepted payment types, and fare media types are listed [online](#).

When Guelph Transit and a retailer both agree to have fare media sold at a location, a fare product vendor agreement must be signed by both parties. The agreement states which fare media will be sold by the retailer, how users can purchase fare media, and if there are any requirements (i.e., \$5 minimum purchase to use debit or credit). If a retailer only accepts cash, they will receive 1.5 per cent in sales commission, but if a retailer accepts cash, debit, and/or credit, they will receive 4 per cent in commission.

The contract terms and policies were updated in June 2022 with assistance from legal and finance. As this agreement was recently updated, these terms will be maintained and are out of scope for discussion.

However, there is no policy in place detailing the content of the contract or criteria for determining where retailers should be located. As such, there is opportunity for introducing a policy that details how retailers are chosen to carry fare media.

**Table 7. Retailers selling fare media policy strengths, issues, and opportunities.**

Strengths	Issues	Opportunities
<ul style="list-style-type: none"><li>Recently updated contract that clearly details key information for retailers selling fare media.</li></ul>	<ul style="list-style-type: none"><li>No formal policy in place to refer to.</li><li>No criteria for selecting retailers.</li></ul>	<ul style="list-style-type: none"><li>Create a formal retailer's policy that aligns with the contract.</li><li>Include criteria for selecting retailers within the policy.</li></ul>

### 4.1.4 Fare disputes

The current fare dispute policy aims to avoid direct conflict between operators and customers by asking customers to pay the proper fare and to

contact Transit afterwards. The policy is posted on the Guelph Transit website as follows:

“Guelph Transit routes and schedules are subject to change without notice and services may be temporarily disrupted due to unforeseen circumstances. Where possible, changes will be posted in advance to notify passengers of the adjusted hours and service levels. These changes are taken into account when calculating Guelph Transit’s fare structure. Discount, adjustments, extensions and refunds will not be issued as a result of closures or service disruptions. In the event of a fare or transfer dispute, passengers are requested to pay the proper fare and then contact:

Guelph Transit  
170 Watson Road South, Guelph, Ontario N1L 1C1  
519-822-1811  
TTY: 519-826-9771  
transit@guelph.ca

You will be required to provide the date, time, route, and vehicle number in order to proceed with your dispute.”

**Table 8. Fare dispute policy strengths, issues, and opportunities.**

<b>Strengths</b>	<b>Issues</b>	<b>Opportunities</b>
<ul style="list-style-type: none"><li>• Clearly outlines what customers should do in the case of a fare dispute.</li><li>• Clearly explains when discounts will not be granted and why.</li></ul>	<ul style="list-style-type: none"><li>• Does not outline how fare disputes will be dealt with.</li></ul>	<ul style="list-style-type: none"><li>• Amend the existing policy to explain that decisions will be made on a case-by-case basis, and staff will follow up with the customer once a decision has been made.</li></ul>

#### **4.1.5 Bus charters**

Guelph Transit offers charter services to the community to provide safe, affordable, and reliable transportation services to get customers to and/or from their events. Customers can fill out a charter request form [online](#) to have Transit staff provide a quote for their event. If customers choose to proceed with the charter, they will sign a contract that contains the details of the schedule, routing, and billing for their charter.

Guelph Transit’s bus charter policy was reviewed internally in late 2021 and was implemented in early 2022. The policy was updated to include an in-depth process for completing charter requests as well as revising the pricing to be competitive with other bus charter agencies while still covering the

operational costs (i.e., operator wages, fuel, maintenance) and maintaining a profit margin that will go back into recovering costs for items that the customer was not charged for (i.e., management staff hours, break operators).

The current pricing for bus charters is \$150 per hour plus fuel costs for every kilometre driven. A minimum of two hours is charged, even if the charter is operating for less than two hours. This is because the Collective Bargaining Agreement (CBA) Article 14.08 requires that an operator be paid for no less than 2 hours of work when reporting to work, even if no work is available.

The hourly rate will be reviewed and updated annually to match cost increases as outlined in the revenue budgeting policy. Staff may choose to defer an increase if the increased hourly rate will cause the price of charters to be too expensive for potential customers.

**Table 9. Bus charter hourly rate prices for 2022, 2023, and 2024 under the revised policy.**

<b>Year</b>	<b>Hourly Rate</b>
2022	\$150
2023	\$150
2024	\$155

As part of the new bus charter policy, customers are required to pay a minimum deposit of 25 per cent of the quote price, although 50 per cent is encouraged. Customers are then charged based on actual kilometers and hours driven, so the actual billing price may be more or less than the quote.

As the bus charter policy was recently updated, there are no changes recommended. Staff are looking for Council's support on the methodology for hourly rate pricing of charters.

#### **4.1.6 Areas with no set policies**

The following items have been identified as not having formal policies in place that Guelph Transit abides by. The following will be addressed with proposed policies in section 5.

- Guelph Central Station bus bay rentals
- Special event pricing
- Travel Training program

## 4.2 Fare structure

Guelph Transit's current fare structure has remained relatively the same since the last fare increase occurred in 2016. Since then, the new EFMS that allows for the use of smart fare cards loaded with e-cash, e-tickets and monthly passes was introduced in 2020. Additionally, a pilot program for Kids Ride Free (aged 12 and under) was launched on March 1, 2022, and a sliding scale Affordable Bus Pass (ABP) pilot program was launched on April 1, 2022. Both programs were launched for one year trial periods, with the ABP program becoming permanent at the January 25 budget confirmation meeting.

### 4.2.1 Fare prices

Guelph Transit's fare structure is an age-based system in which youth and seniors can ride the bus at a fare price that is discounted from the adult price. The pricing for different categories is displayed in Table 10 below.

**Table 10. Guelph Transit's current fare pricing structure.**

<b>Age</b>	<b>Cash fare</b>	<b>E-ticket fare</b>	<b>Monthly pass</b>	<b>Day pass</b>
Child 12 and under	Free	Free	N/A	N/A
Youth 13 to 17	\$3.00	\$2.25	\$68.00	\$8.00
Adult 18 to 64	\$3.00	\$2.80	\$80.00	\$8.00
Senior 65 and up	\$3.00	\$2.25	\$68.00	\$8.00

Currently, there is no formal methodology for determining pricing, rather pricing has been solely compared to council-approved municipal comparators to maintain consistency when fare increases have occurred in the past.

**Table 11. Fare pricing strengths, issues, and opportunities.**

<b>Strengths</b>	<b>Issues</b>	<b>Opportunities</b>
<ul style="list-style-type: none"><li>• Certain aspects of current pricing are on par with comparators.</li><li>• I.e., cash fare is higher than ticket prices; cost of youth and senior tickets and passes are less than adult.</li><li>• Fare prices are generally whole numbers, particularly cash, to avoid the need for nickels and dimes.</li></ul>	<ul style="list-style-type: none"><li>• There is no set methodology for determining pricing and how increases should be decided.</li></ul>	<ul style="list-style-type: none"><li>• Introduce methodology for pricing to maintain consistency.</li><li>• I.e., cash fare is always x per cent higher than an adult ticket; a youth and senior ticket are always discounted by x per cent off an adult ticket.</li></ul>

#### **4.2.2 Day passes**

Guelph Transit has day passes available for purchase for \$8.00, regardless of age. A day pass provides unlimited one-day travel on Guelph Transit for any day of the year. Day passes are considered a single pass on weekdays in which it is valid for one person only. Day passes are considered group passes on weekends in which it is valid for up to five people. Groups can be: One adult and up to four youths 17 years of age and under, two adults and up to three youths 17 years of age and under, or two adults.

Day passes can be purchased at any of the 13 City facilities and retailers that carry this type of fare media, as noted [online](#). To validate a day pass on the day of use, scratch off the month and day on which the pass will be used. Print the month and day in ink in the space provided on the pass. The pass is void if more than one day is scratched.

The following conditions apply to the use of a day pass. Day passes are valid on all regular Guelph Transit routes within the City of Guelph on the date shown on the pass. The pass, along with proof of age, must be submitted for inspection upon request. The pass may be confiscated for misuse. The pass is not transferable or refundable.

**Table 12. Day passes policy strengths, issues, and opportunities.**

<b>Strengths</b>	<b>Issues</b>	<b>Opportunities</b>
<ul style="list-style-type: none"> <li>• Providing a day pass option for unlimited travel.</li> <li>• Clearly defined instructions and conditions.</li> </ul>	<ul style="list-style-type: none"> <li>• Is confusing having a day pass that can be both a single pass and family pass.</li> <li>• A day pass is currently only available in paper and may be inconvenient to purchase.</li> </ul>	<ul style="list-style-type: none"> <li>• Remove the weekend pass for simplicity.</li> <li>• Set day pass pricing relative to the price of an adult single ride.</li> <li>• Make the day pass available for purchase on an OnYourWay fare card.</li> </ul>

### 4.2.3 Transfers

The current transfer policy gives customers a free 60-minute transfer after they have paid their initial fare. The policy is stated on the Guelph Transit website as follows:

“Passengers can transfer routes at any point where two routes connect. Passengers must request a transfer when they first board the bus if they require a transfer to continue along their route. When boarding a bus with a transfer, passengers must present the transfer to the driver unfolded and date-side up for inspection. Transfers must NOT be placed in the fare box.

A 60-minute transfer is automatically activated on your OnYourWay card when paying with a monthly pass or stored ride/dollar value. No additional fare will be deducted from your card if you tap again within that 60-minute period. If you pay cash, you will need to request a paper transfer from the transit operator. Paper transfers state the expiry date and time.”

According to best practices, a transfer should be short-term, unlimited, and not directionally restricted to promote the use of transit for quick errands.

**Table 13. Transfers policy strengths, issues, and opportunities.**

<b>Strengths</b>	<b>Issues</b>	<b>Opportunities</b>
<ul style="list-style-type: none"> <li>• Clearly defined instructions and conditions.</li> <li>• The 60-minute validity period aligns with best practices.</li> </ul>	<ul style="list-style-type: none"> <li>• There is no methodology in place for determining the transfer time.</li> </ul>	<ul style="list-style-type: none"> <li>• Implement a methodology for determining transfer time.</li> <li>• Review the transfer time annually to ensure the methodology is being followed.</li> </ul>

## 4.3 Fare programs

In addition to the standard fare structure, there are several fare programs in place to support different groups and encourage ridership.

### 4.3.1 Kids Ride Free program

At the December 2, 2021, Council budget meeting, the following motion was brought forward and passed to initiate a Kids Ride Free pilot program:

- 1. A “kids ride free transit” 2022 pilot program for kids from 5-12 years old totaling a budget investment of up to \$125,000 in 2022 funded from the Tax Operating Contingency Reserve, to be launched no later than March 1, 2022, and that staff report back by Q4, 2022 regarding the results of the pilot.**

Guelph Transit launched the yearlong pilot program on March 1, 2022. To participate in the program, kids aged 5 to 12 years old were required to purchase an OnYourWay fare card and provide proof of eligibility to have the card registered in the Kids Ride Free program. Children aged 4 years old and under continue to ride free without a fare card.

By the end of September 2022, 490 kids OnYourWay transit fare cards had been issued, and 10,138 boardings had occurred as part of the program. Based on the monthly increases in boardings, by the end of the pilot, it is estimated that 625 kids OnYourWay fare cards will have been issued, and 25,007 boardings will have occurred through the program. The projected financial impact of revenue loss during the yearlong pilot program is \$56,265.

The pilot program was set to end on February 28, 2023, but at the January 25, 2023, confirmation budget meeting, Council decided to continue the program until the Fare Strategy could be presented and a final decision on the program could be made.



**Table 14. Kids Ride Free program strengths, issues, and opportunities.**

<b>Strengths</b>	<b>Issues</b>	<b>Opportunities</b>
<ul style="list-style-type: none"><li>• Eligibility is clearly explained.</li><li>• The program has had very positive feedback and seen good uptake.</li></ul>	<ul style="list-style-type: none"><li>• Program is only one year trial.</li><li>• Users experienced some confusion around requirements for riding free.</li></ul>	<ul style="list-style-type: none"><li>• Make the program permanent and update the program description online to clearly explain program requirements.</li></ul>

#### **4.3.2 Personal Assistant for Leisure activities (PAL) card**

A [Personal Assistant for Leisure Activities \(PAL\) card](#) is available to people with a disability who require assistance to ride Guelph Transit conventional and mobility services. The PAL card is issued to the person with the disability and allows them to be accompanied by a friend, relative, support worker, etc., as their support person who participates as an attendant at no additional cost. A support person can be a different person each time, but they will help the person with a disability with tasks related to communication, mobility, personal care or medical needs, or with access to goods or services.

There are certain eligibility requirements that must be met to obtain a PAL card. An application must be completed to determine eligibility for a PAL card, which can be obtained at City Hall or online.

Professional PAL Cards are available to qualifying agencies serving individuals with a disability to use with their clients/consumers as part of their treatment.

**Table 15. PAL card program strengths, issues, and opportunities.**

<b>Strengths</b>	<b>Issues</b>	<b>Opportunities</b>
<ul style="list-style-type: none"><li>• Clearly explains who can obtain a PAL card and for what it can be used.</li></ul>	<ul style="list-style-type: none"><li>• No renewal requirement is in place so its difficult to keep track of active passes.</li></ul>	<ul style="list-style-type: none"><li>• Introduce a requirement for passes to be renewed every 5 years, excluding passes that have a built-in expiry date for temporary disabilities and injuries.</li></ul>

### 4.3.3 CNIB Pass

Visually impaired riders registered with the Canadian National Institute for the Blind (CNIB) ride free when a CNIB registration card is presented upon boarding the bus.

**Table 16. CNIB cardholders ride free program strengths, issues, and opportunities.**

Strengths	Issues	Opportunities
<ul style="list-style-type: none"><li>Program eligibility requirements are clearly defined.</li></ul>	<ul style="list-style-type: none"><li>Currently, the pass is the user's CNIB card that must be verified by operators.</li></ul>	<ul style="list-style-type: none"><li>Transition the CNIB Pass program onto the OnYourWay fare card.</li><li>Introduce a registration form and a requirement for passes to be renewed every 5 years.</li></ul>

### 4.3.4 Veterans Transit Pass

Any Guelph resident who has served with the Canadian forces or its allies is eligible for free access to Guelph Transit or for free parking at select lots in the City of Guelph. The [Transit Pass for Veterans](#) is valid for use on Guelph Transit conventional, mobility services, and on-demand buses, and may not be used on any other municipal, provincial, or federal transportation systems.

Applicants are eligible to have either a Veterans Parking Pass or Veterans Transit Pass, but not both. Passes must be renewed annually.

Annual pass holders can change their pass type once per year at renewal, between October 1 and November 30. Pass holders will be required to complete this application form and bring it and their current pass to the Parking Office to switch to a parking pass, or to the Transit Administration Office to switch to a transit pass. Switching from a parking pass to a transit pass mid-year may be permitted if there are validated extenuating circumstances (i.e., loss of driver's licence).

Applicants are required to show proof of service by providing a copy of one of the following documents:

- Canadian Forces Certificate of Service or Discharge Certificate (front and back) or equivalent for the Merchant Navy and Allied Forces
- Veterans Affairs Canada Health Identification Card
- If currently serving, a letter from applicant's home unit confirming type of service, receipt of Canadian Decoration or three years of paid duty

- If police personnel, a letter from the applicant's police service confirming his/her involvement in a NATO operation or a United Nations (UN) peacekeeping mission
- Statement of service or discharge certificate showing service in Vietnam during Vietnam War in the United States forces or the forces of its allies during this war and proof of Canadian Citizenship at the time of service

Applicants must also show proof of Guelph residency via supporting documentation such as a copy of a current utility bill or a current rental/lease agreement.

The application can be printed or picked up from the locations listed online and returned to Guelph Transit administration.

**Table 17. Veterans ride free program strengths, issues, and opportunities.**

<b>Strengths</b>	<b>Issues</b>	<b>Opportunities</b>
<ul style="list-style-type: none"> <li>• Program conditions and eligibility requirements are clearly defined.</li> </ul>	<ul style="list-style-type: none"> <li>• Those with a Veterans Transit Pass are not likely to switch to a parking pass and will always be eligible, so annual renewal is excessive.</li> <li>• Currently, it is a pass that is shown to operators and ridership must be tracked by the operator.</li> </ul>	<ul style="list-style-type: none"> <li>• Switch renewal requirement to every five years.</li> <li>• Transition the Veterans Pass program onto the OnYourWay fare card.</li> </ul>

#### **4.3.5 Retired Transit Operators Pass**

Retired Guelph Transit bus operators who were part of ATU 1189 ride free when the pass they were given upon retirement is presented upon boarding the bus. This is a requirement outlined in the CBA Article 28.02a.

**Table 18. Retired transit operators ride free program strengths, issues, and opportunities.**

<b>Strengths</b>	<b>Issues</b>	<b>Opportunities</b>
<ul style="list-style-type: none"> <li>• Program eligibility requirements are clearly defined.</li> </ul>	<ul style="list-style-type: none"> <li>• Currently, the pass is a photo ID card that must be verified by operators.</li> </ul>	<ul style="list-style-type: none"> <li>• Transition the Retired Transit Operators Pass program onto the OnYourWay fare card.</li> <li>• Introduce a requirement for passes to be renewed every 5 years.</li> </ul>

### 4.3.6 Corporate Pass program

The Corporate Pass program was launched by Transit in February 2008 as a pilot project, as directed by Council. The University of Guelph and Co-operators participated in the pilot, in which their employees could sign up for a monthly bus pass at a discounted rate that was subsidized by Guelph Transit.

The pilot was deemed successful after the first year, but more information was required, and it was extended for an additional year. In September 2009, the pilot project was extended yet again, but this time until the recommendations of the Transit Growth Strategy could be reviewed and assessed in 2010.

When the Transit Growth Strategy was brought to Council in July 2010, all recommendations were moved by Council, including "that Guelph Transit assess the feasibility of extending the U-Pass concept to employers in the City of Guelph."

While the feasibility was assessed, the pilot continued as normal. Once it was deemed that a U-Pass for employers would not be financially feasible, the Corporate Pass program was continued as is due to the success of the pilot and continues to operate in the same manner today as a legacy program.

**Table 19. Corporate pass program strengths, issues, and opportunities.**

<b>Strengths</b>	<b>Issues</b>	<b>Opportunities</b>
<ul style="list-style-type: none"><li>• Positive feedback has been received from those that participate in the program.</li></ul>	<ul style="list-style-type: none"><li>• Not an official program with no set eligibility criteria, conditions, or pricing rationale.</li><li>• Transit currently covers the full cost of the discount provided.</li></ul>	<ul style="list-style-type: none"><li>• Enhance the program by introducing set pricing, conditions, and eligibility criteria.</li><li>• Share the cost of the discount with employers.</li></ul>

### 4.3.7 Travel Training program

Guelph Transit hosts occasional Travel Training sessions to help existing and potential customers become more confident and independent with taking transit.

The Travel Training program supports and provides guidance for individuals living with a disability who are looking to use the conventional transit system. Participants can learn to ride the bus in the months of October and/or March with a volunteer who will share everything a user may need to know.

**Table 20. Travel training program strengths, issues, and opportunities.**

<b>Strengths</b>	<b>Issues</b>	<b>Opportunities</b>
<ul style="list-style-type: none"> <li>Provides potential and existing customers the opportunity to become more comfortable with taking transit independently.</li> <li>Supported by volunteers who are regular transit users.</li> </ul>	<ul style="list-style-type: none"> <li>The existing program is limited to offering training on a request basis, and the existing course may not be best suited for training diverse user groups.</li> </ul>	<ul style="list-style-type: none"> <li>Research and enhance the program to offer in class and on the bus training to encourage ridership.</li> <li>Create training courses that are tailored to target user groups (i.e., kids, newcomers, seniors).</li> <li>Offer free rides to participants to use newly obtained skills.</li> </ul>

#### **4.3.8 Mobility services taxiSCRIP program**

The taxiSCRIP program provides discounted coupons for Red Top Taxi accessible vehicle service within the city limits of Guelph. To be eligible for taxiSCRIP, a passenger must have a permanent mobility services registration number and be registered as requiring the use of a wheelchair or scooter. Passengers may reserve a trip directly with the taxi company.

A \$40 taxiSCRIP coupon book can be purchased for \$20. A maximum of two taxiSCRIP coupon books can be purchased each month. TaxiSCRIP coupons do not expire. Books of taxiSCRIP coupons may be purchased at the following locations:

- ServiceGuelph, City Hall, 1 Carden Street
- Guelph Transit's Administration Office, 170 Watson Road South
- Evergreen Seniors' Centre, 683 Woolwich Street
- West End Community Centre, 21 Imperial Road South

**Table 21. TaxiSCRIP program strengths, issues, and opportunities.**

<b>Strengths</b>	<b>Issues</b>	<b>Opportunities</b>
<ul style="list-style-type: none"><li>• Provides an alternative transportation option for mobility service users at a discounted rate outside of mobility service booking hours.</li><li>• There are multiple accessible locations that users can purchase coupon books from.</li></ul>	<ul style="list-style-type: none"><li>• The amount of coupon books that can be purchased per month has not increased with the rate of inflation, so customers do not get as many rides out of a coupon book as they used to.</li></ul>	<ul style="list-style-type: none"><li>• Increase the number of coupon books that can be purchased each month.</li></ul>

#### **4.3.9 City of Guelph Employee Pass program**

The City of Guelph Employee Pass program was introduced to full- and part-time permanent employees in 2006. This program provides City staff with two options:

1. **Annual Transit Pass.** An annual transit pass at 100 per cent discount can be obtained by any City of Guelph employee that works at City Hall. Employees must commit to a full year in the program and can only opt out at the end of the calendar year.
2. **Monthly Transit Pass.** City of Guelph staff can purchase a monthly bus pass at 50 per cent of the regular monthly cost. Employees may opt in or out of this program on a month-by-month basis.

City of Guelph Employee Pass program is a taxable benefit managed by the Human Resources department. This pass may only be used by the employee to whom it was issued and proof of employment, such as a corporate photo identification or a current pay stub, must be shown upon request by Guelph Transit staff. Passes will be confiscated by Guelph Transit staff if they are used by someone other than the employee who was identified as the program participant.

City of Guelph Employee Passes have recently been transferred over to an OnYourWay fare card that the user will tap when boarding the bus.

**Table 22. City of Guelph Employee Pass program strengths, issues, and opportunities.**

<b>Strengths</b>	<b>Issues</b>	<b>Opportunities</b>
<ul style="list-style-type: none"> <li>• Provides City staff with incentive to use transit.</li> <li>• Has been running successfully with help from Human Resources staff.</li> </ul>	<ul style="list-style-type: none"> <li>• The monthly pass program is not available to all City staff.</li> <li>• The program is not advertised or promoted.</li> </ul>	<ul style="list-style-type: none"> <li>• Expand the monthly pass program so all City staff are eligible to participate.</li> <li>• Work with Human Resources staff to enhance the customer experience and promote the program.</li> </ul>

#### **4.3.10 Community event sponsorships**

Guelph Transit works with local businesses and/or the City as sponsors for community and special events. Local businesses can also approach Transit if there is an event they would like to sponsor. Once both parties have agreed to the sponsorship, a contract is signed detailing the cost of the sponsorship, and any advertising benefits the business will receive in return.

Currently, the following community events have free ride programs:

- Guelph Storm ticketholders ride free on game days from three hours before the game to the end of service (sponsored by a local business)
- Everyone rides free on New Year's Eve from 7 p.m. to the end of extended service (sponsored by local business)
- Everyone rides free on Clean Air Day to encourage transit ridership and support lowering GHG emissions (subsidized by the City of Guelph)

As this program has been running successfully, this program will continue operating as is.

#### **4.3.11 U Pass program**

The U Pass program is an agreement made with the University of Guelph's Central Student Association and Graduate Students' Association (CSA/GSA) that each registered student pays for a bus pass as part of their tuition fees each semester. This allows students to use their student ID card as their fare card, with unlimited rides allowed for student's that have paid their fees for the semester.

The cost of a U Pass in the fall 2022/winter 2023 school year is \$154 per semester per student and will increase by a small amount each year to keep up with rising costs.

The U Pass agreements are made in four-year increments, with the most recent contract signed for 2022-2026. As such, this program is outside the scope of the Fare Strategy and the U Pass program will continue to operate as per the contract.

#### **4.3.12 GO Transit Co-fare program**

Prior to 2022, the GO Transit Co-fare program provided discounted fares when connecting to Guelph Transit from GO Transit. Instead of the customer paying the full \$3.00 cash fare to get on Guelph Transit, riders would pay \$0.60 instead.

On March 14, 2022, the new GO Transit Co-fare program was introduced that allows passengers to ride Guelph Transit for free when connecting to or from a GO Train at Guelph Central Station, or any GO Bus at any GO Bus connection across the city. Passengers qualify to ride free on Guelph Transit buses on any service day or time when presenting one of the following:

- A valid single ride GO Transit ticket
- A valid GO Transit day pass
- A PRESTO card

As this program is managed and funded by GO Transit, it is outside the scope of the Fare Strategy for making changes.

#### **4.3.13 Community Investment programs**

There are several fare programs that are managed by the Community Investment department at the City of Guelph. As such, the following programs are outside the scope of the Fare Strategy, but they will continue to be monitored and evaluated by Community Investment in partnership with Transit.

##### **Affordable Bus Pass program**

Starting April 1, 2022, a new one-year sliding scale Affordable Bus Pass (ABP) pilot program began, addressing barriers for Guelph residents living on a low income.

Council approved a three-tier approach to the pilot at the December 2, 2021, budget meeting, which applicants qualify for based on their level of income under the LICO (Low Income Cut Off).

The monthly fees based on tiers are:

- Tier A (0-50 per cent of LICO): \$4.00/month
- Tier B (50-75 per cent of LICO): \$20.00/month



- Tier C (75-100 per cent of LICO): \$31.00-\$37.50/month (depending on age)

An ABP can be purchased monthly at a discounted rate by residents living in low-income households. Eligibility for each tier is determined by family size and household income, as specified [online](#).

The pilot program was slated to end on March 31, 2023, but at the January 28, 2023, confirmation budget meeting, Council decided to continue the program permanently.

### **Welcome to Guelph program**

The Welcome to Guelph program provides free temporary access to a variety of City facilities and services, including the ability to ride Guelph Transit for free, to those that meet the eligibility criteria.

Welcome to Guelph cards are available to individuals who came to Canada as a refugee within the past 12 months and are currently residing in Guelph.

Cardholders show their card to Guelph Transit bus drivers when boarding the bus to ride free. This program will be transitioned to an OnYourWay fare card in 2023.

## **4.4 Fare payment options**

The current methods of payment available on Guelph Transit buses are as follows.

### **4.4.1 Cash**

Riders can pay with exact change on the bus by placing money in the farebox. Coins and bills are accepted.

### **4.4.2 OnYourWay fare card**

Users can tap a preloaded OnYourWay fare card on the fare box. Fares can be loaded online or in person at City facilities or retailers with e-cash, e-rides, or a monthly pass.

### **4.4.3 Mobile app**

Customers can scan the QR code in the mobile app that is linked to their digital OnYourWay fare card. The app can be loaded with e-cash, e-rides, or a monthly pass.

#### **4.4.4 Transfers**

Upon paying cash, a paper transfer can be requested which must be shown to the driver when boarding the bus. It expires 60 minutes after initial payment.

Upon tapping a physical or digital OnYourWay fare card, a 60-minute transfer will be automatically activated. When a user boards a bus within that 60-minute period, they will tap their card and no additional fare will be charged.

#### **4.4.5 U Pass**

University of Guelph students who have paid their tuition fees will have their U Pass loaded onto their student ID card. They tap their student card on the fare box when boarding and have unlimited rides each semester they are enrolled in classes.

#### **4.4.6 QR tickets**

Customers with a single use QR ticket can scan the ticket on the fare box. A 60-minute paper transfer may also be requested. QR tickets are available via special programs only.

#### **4.4.7 Specialty cards**

Users with specialty cards, such as a Welcome to Guelph card, PAL card, CNIB card, Veterans Pass, or Retired Transit Operators Pass, either show their card to the operator or tap their card on the fare box when boarding a bus.

### **5. Updated policies**

The policies in this section are based on pre-existing policies for the fare system. These policies have been updated based on industry best practices, comparator policies, and, where applicable, community engagement. They have been updated to improve the customer experience by clearly explaining eligibility requirements and processes. Additionally, these policies will guide staff on how to proceed with internal processes.

#### **5.1 Fare categories and eligibility**

Although there are transit agencies that have been shifting to an income-based fare structure to promote equity, approximately two thirds of community engagement survey respondents wanted to maintain the current age-based fare structure. Additionally, Guelph has a unique Affordable Bus

Pass program that offers deeper discounts to eligible customers than most municipal comparators, meaning fare equity is already being addressed.

As such, the age-based fare structure will be maintained, and six fare category groups will be introduced, which are defined as follows.

**Child**

A “child” is anyone aged 4 years old and under. An OnYourWay fare card is not required. Proof of age is not required.

**Kid**

A “kid” is anyone aged 5-12 years old. Government issued ID is required to obtain an OnYourWay fare card registered in this category. A “kid” fare card will expire on December 31<sup>st</sup> of the year the user turns 13 years old.

**Youth**

A “youth” is anyone aged 13 to 17 years old, or those aged 18 and older that are in full-time attendance at high school. Government issued ID or proof of high school enrollment is required to obtain an OnYourWay fare card registered in this category. A “youth” fare card will expire on December 31 of the year the rider turns 18 years old. A “youth” fare card can be reactivated for an additional year if proof of high school enrollment is presented.

**Post-secondary student**

A “post-secondary student” is anyone who is enrolled in post-secondary studies and is not participating in a U Pass program. Proof of enrollment is required to obtain an OnYourWay fare card registered in this fare category. A “post-secondary student” fare card will expire on August 31<sup>st</sup> of each year. A “post-secondary student” card can be reactivated if proof of enrollment is presented.

**Adult**

An “adult” is anyone aged 18 to 64 years old. Anyone may purchase an “adult” fare card as government issued ID is not required. An “adult” fare card does not expire.

**Senior**

A “senior” is anyone aged 65 years old or older. Government issued ID is required to obtain an OnYourWay fare card registered in this category. A “senior” fare card must be renewed every five years.

## 5.2 OnYourWay fare cards

### 5.2.1 Retail locations

OnYourWay fare cards will continue to be available for purchase at the 11 retailers and 10 City facilities throughout Guelph. Any future retailers that are added will also have fare cards available for purchase. All locations allow for the purchase of an adult fare card as no proof of eligibility is required.

13 of the 21 locations that fare media can be purchased at have blank cards available, which can be assigned to a reduced fare category. Reduced fare cards can be purchased and registered at ServiceGuelph in City Hall or at the Guelph Transit office. The remaining eight locations only have adult fare cards available for purchase.

All locations allow for the reloading of fare cards, regardless of the category the fare card is registered to, or fare cards can be reloaded online at [onyourwayreload.guelph.ca](http://onyourwayreload.guelph.ca).

A new standard has been set that requires the top 50 bus stops by daily average boardings, excluding terminals, to be within a 400-metre walking distance of a reload location, where possible. The proximity of potential retailers to affordable housing and retirement facility locations will also be considered. Potential new retailers will be identified, and these retailers will be approached for partnership. The list of reload locations will be reviewed annually to ensure this standard is being met.

### 5.2.2 Fare card conditions

All fare programs will be required to obtain an OnYourWay fare card. By transferring all programs to a fare card, it makes it easier to manage these programs and keep track of unique users of each specialty fare program.

For consistency, all fare cards for age-based fare categories, even reduced fare cards, will cost \$5.00 to purchase while the fare cards for specialty programs will be provided for free once eligibility has been confirmed. If a fare card has been lost, regardless of the fare category or program the card is registered with, there is a \$5 replacement fee.

**Table 23. Cost to purchase an OnYourWay fare card to participate in each fare program.**

<b>Fare program</b>	<b>Cost to purchase a fare card</b>
Adult fares	\$5.00
Kids fares	\$5.00

<b>Fare program</b>	<b>Cost to purchase a fare card</b>
Concession fares (youth, post-secondary, and seniors)	\$5.00
Corporate Pass	\$5.00
City of Guelph Employee Pass	\$5.00
Veterans Transit Pass	\$0
PAL card	\$0
CNIB Pass	\$0
Retired Transit Operators' Pass	\$0
Affordable Bus Pass	\$0
Welcome to Guelph card	\$0

### **5.2.3 Fare media**

Currently, OnYourWay fare cards can be loaded with e-cash, e-rides, and monthly passes. If a user loads e-cash, they will be charged \$3.00 each time they ride the bus, but if a user loads e-rides, it costs \$2.80 per ride. To simplify the fare media options and ensure regular riders are being rewarded with a discounted fare price, all users that load cash will be charged \$2.80 per ride.

Simplifying this system will free up administrative staff time assisting customers that accidentally loaded incorrect fare media.

## **5.3 Retailers' selling fare media**

When a new retailer is needed, triggered by the new standard, potential retailers will be identified and approached for partnership.

When identifying potential new retailers, the following criteria must be met:

- The retailer must be within a 400-metre walking distance of bus stop(s).
- There must not be any other retailers already selling fare media within the vicinity.
- The retailer must be a convenience store, grocery store, or retail store of similar nature.

If an approached retailer is interested in partnering with Guelph Transit to sell fare media, a standard fare product vendor agreement will be drawn up. Among the standard terms and conditions, the agreement will determine the following:

- Which fare media will be sold by the retailer.
  - Adult fare cards, blank fare cards, and/or reloading of cards.

- Which methods of payment will be accepted.
  - Cash, debit/Interac, MasterCard, Visa, and/or American Express.
- Any minimum purchase requirements and/or additional fees.
  - The minimum purchase price required to pay with debit or credit.
  - An additional fee for using a point-of-sale terminal.
- What sales commission percentage the retailer will be awarded.
  - 1.5 per cent if only cash is accepted.
  - 1.5 per cent if cash, debit, and credit are accepted with additional fees.
  - 4 per cent if cash, debit, and credit are accepted with no additional fees.

Guelph Transit and the retailer must both agree to the conditions laid out in the standard fare product vendor agreement and both parties must sign the agreement for it to be valid.

## **5.4 Fare disputes**

The fare disputes policy has been updated to the below.

“Guelph Transit routes and schedules are subject to change without notice and services may be temporarily disrupted due to unforeseen circumstances. Where possible, changes will be posted in advance to notify passengers of the adjusted hours and service levels. These changes are considered when calculating Guelph Transit’s fare structure. Discounts, adjustments, extensions, and refunds will not be issued because of closures or service disruptions. In the event of a fare or transfer dispute, passengers are requested to pay the proper fare and then contact:

Guelph Transit  
 170 Watson Road South, Guelph, Ontario N1L 1C1  
 519-822-1811  
 TTY: 519-826-9771  
[transit@guelph.ca](mailto:transit@guelph.ca)

You will be required to provide the date, time, route, and vehicle number in order to proceed with your dispute.

Decisions will be made on a case-by-case basis. Once the dispute has been investigated and a decision has been made, staff will follow up with the customer.”

## **5.5 Bus bay rentals**

Currently, there are three bus bays at Guelph Central Station that are rented out to other transit agencies; however, there is not a consistent price they are rented at.

To rectify this, a monthly rate will be set for renting a bus bay. The monthly rate will be reviewed annually and will be set at a price that covers the maintenance and utilities costs of Guelph Central Station.

The budget for maintaining Guelph Central Station in 2023 is \$27,600. Therefore, the rate will be set at \$767 per month for each bus bay. This rate will be reviewed at the end of the year and adjusted to cover the 2024 budget.

## **5.6 Special event pricing**

If there are multi-day special events, such as conferences or sporting events, being hosted in Guelph, the host organization may approach Guelph Transit about special fare pricing for attendees.

To ensure consistency, Guelph Transit may choose to offer the organization a discounted rate at concession fare pricing if the following conditions are met:

- The event is at least two days long and attendees will be taking transit multiple times through the duration of the event.
- Multi-day fares must be purchased for at least one hundred people by the host organization.

# **6. Fare Strategy proposals**

The following section details the proposed changes to the fare structure, programs, and payment options as well as new financial indicators to track the performance of the Fare Strategy. The recommendations were developed with a focus on making the fare system more accessible and affordable for all current and future customers. Industry best practices, municipal comparator practices, and community engagement results were considered in the development of the recommendations.

## **6.1 Proposed fare structure**

As Guelph Transit is a medium-sized transit system, it is recommended that the flat fee fare structure be maintained. Distance and zone-based fares are

not recommended because Guelph does not have clear zones or far enough distances to travel and this would only complicate the fare structure.

Additionally, it is recommended that the current age-based fare structure be maintained as it was favoured by the public during community engagement and income-based fares are already being addressed through the ABP program. If the income-based fare structure were implemented, it would also be difficult to justify the implementation of age-based fare programs, such as the Kids Ride Free program.

### **6.1.1 Transfers**

To provide consistency in determining the length of time a transfer is valid, it is recommended that the transfer time should always be half the length of the longest route's cycle time, plus a 15-minute buffer. The cycle time refers to how long it takes for a bus to get from its start point back to the start point on a route. This methodology assumes that a user will not be riding the full cycle time as no routes exist where it would be in a user's best interest to ride the full cycle time.

In this case, the longest cycle time belongs to the Route 99 Mainline at 90 minutes. Half of the cycle time is 45 minutes, plus the 15-minute buffer period, equals a 60-minute transfer time.

As such, it is recommended that the 60-minute transfer time be maintained and reviewed annually to ensure the time aligns with the methodology.

## **6.2 Fare pricing**

To ensure consistency, simplicity, and equity in fare pricing, now and into the future, it is recommended that the following pricing and pricing methodology be implemented.

### **6.2.1 Cash fare**

To improve simplicity and ease of use, a base cash fare price that applies to all customers who choose to pay cash will be set. Concession fare discounts do not apply to the cash fare.

The cash fare will always cost approximately 10 per cent to 20 per cent more than prepaid fares to reward frequent riders. It is recommended that the cash fare price be increased in \$0.25 increments every 2 years, beginning in 2026, to minimize the number of coins required to pay.



It is also recommended that the cash fare be increased from \$3.00 to \$3.25 in September 2023 to offset inflationary costs that have not been accounted for since the last cash fare increase in 2011.

### **6.2.2 Concession fares**

“Youth,” “post-secondary student,” and “senior” fare categories are the target groups for concession fares. Those that fall under the “kid” fare category would also be included in concession fares if the Kids Ride Free program is not continued.

Concession fares refer to discounts on adult fares that are given to anyone that meets the criteria of a target group. To simplify the fare structure and maximize equity across vulnerable groups, identical discounts will be applied to all target groups.

It is recommended that concession fares always be 20 per cent less than adult fares, rounded to the nearest \$0.05 increment.

### **6.2.3 Single ride fare (e-ticket)**

For consistency in fare increases, it is recommended that the adult single ride fare, or e-ticket, price be the base price that all other fare media prices are based upon, except for cash fare.

It is recommended that the adult single ride fare be maintained at \$2.80, and the concession single ride fare be maintained at \$2.25, which is a 20 per cent discount on the adult single ride fare.

Beginning in 2025, it is recommended that the single ride fare be increased by 2 per cent every year, rounded to the nearest \$0.05 increment.

### **6.2.4 Day pass**

To make the price of a day pass consistent with each fare increase, it is recommended that the day pass always be set at three times the price of an adult single ride fare. In addition, it is recommended that the weekend pass be eliminated to simplify the fare structure.

As such, it is recommended that the price of the day pass be increased from \$8 to \$8.40, which is equivalent to three times the price of one adult single ride fare (\$2.80). The day pass will be available for purchase from select retailers and can be loaded on an OnYourWay fare card as well.

### **6.2.5 Monthly fare capping**

To simplify the fare structure, it is recommended that the monthly pass be transitioned into a pay-as-you-go program, known as a Fare Capping Loyalty

program. Fare capping is when a rider's total fares within a set period of times are capped at the equivalent value of an unlimited pass for the same period. Customers will continue to pay the same price per ride and once the customer has reached a set number of rides within a calendar month, they will ride for free for the rest of that month.

It is recommended that the monthly fare cap for adult and concession fares be set at 34 rides. If the cap is reached, the maximum a user paying adult fares will pay per month is \$95.20 ( $\$2.80 \times 34$ ), and the maximum a user paying concession fares will pay per month is \$76.50 ( $\$2.25 \times 34$ ). The proposed Fare Capping Loyalty program is further discussed in section 6.3.1.

### **6.2.6 Fare pricing structure**

An updated fare pricing structure and new pricing methodology are being recommended to maintain consistency with municipal comparators and ensure the outlined cost recovery under the revenue budgeting policy is being met.

#### **Why are fare increases necessary?**

Guelph hasn't increased fares since 2016 and had the adult monthly pass rate been increased by 2.25 per cent annually since then, the current rates would be at approximately the same rates as proposed.

Guelph Transit has made many service enhancements since the last fare increase, such as expanding route 99 Mainline Sunday service hours, increasing midday frequency on several routes, and reinstating conventional service to the Hanlon Creek Business Park. Regular increases in fares will allow Guelph Transit to continue to make service enhancements and provide additional support for upcoming capital projects, such as new shelters at Guelph Central Station as well as digital signs at the University of Guelph bus loop, Guelph Central Station, and Stone Road Mall.

The new pricing structure aligns Guelph Transit's rates with our municipal comparators, and the regularly scheduled increases will help account for growing maintenance and inflationary costs.

#### **Proposed fare pricing structure**

To simplify the fare structure, the same discounts and fare caps have been applied to all concession fares. While the initial increase may seem high, this will bring Guelph Transit's fare prices up to par with our comparators. It's important to note that Guelph provides significantly more service than our comparators (i.e., number of routes and service hours), yet prices have not been increasing as this service has been added.

Additionally, the increased rate is further justified by Guelph offering the Affordable Bus Pass program, which offers a larger discount than most municipal comparators to low-income individuals who may not be able to afford regular transit fares.

If the proposed methodology and fare increase schedule are approved, the updated fare prices for September 2023 will be as displayed in Table 24.

**Table 24. Proposed fare pricing structure for September 2023.**

<b>Fare category</b>	<b>Cash fare</b>	<b>E-ticket / single ride fare</b>	<b>Day pass</b>	<b>Fare capping maximum</b>
Child	Free	-	-	-
Kid	Free	Free	-	-
Youth	\$3.25	\$2.25	\$8.40	\$76.50
Post-secondary	\$3.25	\$2.25	\$8.40	\$76.50
Adult	\$3.25	\$2.80	\$8.40	\$95.20
Senior	\$3.25	\$2.25	\$8.40	\$76.50

A fare increase will not have a significant impact on transit-dependent riders' demand but can have an impact on discretionary riders' demand. That is not to say that dependent riders will not be affected, but their demand is considered inelastic – that is, the price of transit will not change their choice to use transit. Conversely, where riders are discretionary, the price of transit can influence their transportation choice.

Furthermore, fare increases are generally more accepted when users can see that their money is going towards creating a better transit network, which the GTFRAP will do by increasing service levels and expanding the network. The fare increases paired with the Fare Capping Loyalty program will have a minimal impact on ridership, and growth is expected from the GTFRAP changes. The ridership impact is discussed further in Section 6.3.1.

There is an overall positive impact expected on annual revenue, which is further discussed in Section 7.1.

### **Proposed fare pricing schedule**

After the initial increase in September 2023, an approximate 2 per cent increase will happen annually to account for growing costs due to inflation.

**Table 25. Proposed fare percentage increase schedule for 2023 – 2031.**

<b>Fare media</b>	<b>2023*</b>	<b>2024</b>	<b>2025</b>	<b>2026</b>	<b>2027</b>	<b>2028</b>	<b>2029</b>	<b>2030</b>	<b>2031</b>
Cash	8.3%	0%	0%	8%	0%	7%	0%	7%	0%
Single ride (e-ticket)	0%	0%	2%	2%	2%	2%	2%	2%	2%
Fare cap maximum (adult; concession)	19%; 12.5%	0%	2%	2%	2%	2%	2%	2%	2%
Day pass	5%	0%	2%	2%	2%	2%	2%	2%	2%

\* Higher initial increases to bring prices up to what they would have been if inflationary increases had been accounted for each year since 2016.

## **6.3 Proposed fare programs**

Through research into industry best practices, Guelph's municipal comparators, and the results of the community engagement campaign, the following fare programs were selected as the most important to be implemented.

Other fare programs were considered and were deemed as contextually applicable, but not currently financially feasible. As such, Guelph Transit will continue to explore the viability and possible future implementation of other fare programs, such as a youth summer pass program and a seniors ride free day program.

### **6.3.1 Fare Capping Loyalty program**

As mentioned in section 6.2.5, it is recommended that the monthly pass program be transitioned into a pay-as-you-go program, known as a Fare Capping Loyalty program. It is recommended that the fare cap be set at 34 rides for adult and concession fares, meaning a customer will pay a single ride fare each time when boarding, and once they have paid this fare 34 times, they will ride free for the rest of the calendar month.

#### **Why fare capping?**

Staff are recommending fare capping because of the affordability it provides our customers. As affordable transit is a key theme in many City plans, fare capping will contribute to achieving this goal because customers won't have to decide whether to pay upfront for a monthly pass that they may not get their money's worth out of. Fare capping will simplify the fare structure and

take the decision making out of the system because there is only one fare product to load, and customers will only pay for what they use.

Additionally, this program is designed to reward frequent riders without the need to determine if they will use transit enough each month to warrant purchasing a monthly pass. Fare capping ensures the best price is available to all riders, and makes transit more accessible, flexible, and affordable.

During community engagement, the Fare Capping Loyalty program was the preferred monthly fare program option at open houses and in the main Fare Strategy survey, receiving 44.7 per cent of votes in each (see

Self-service reload kiosks	Yes	Likely	<ul style="list-style-type: none"><li>• Added option for reloading fare cards</li><li>• Popular option in community engagement</li><li>• Possibly reduce staff resources needed for reloading</li></ul>
----------------------------	-----	--------	---

Appendix D: Public engagement results summary).

The financial impact of fare capping is offset by fare equity and is the key reason many transit agencies have transitioned from monthly passes to fare capping. Large transit agencies, like GO Transit, are leading the industry in fare capping. Guelph Transit wants to be a leader in the transit industry by transitioning to fare capping as we understand how it benefits our customers.

### **Fare capping impacts for customers**

Currently, 35 per cent of customers who purchase a monthly pass do not ride enough to require a monthly pass. If the transition to fare capping is made, 71 per cent of customers using rides and e-cash will see no change in price or will have a savings each month while only 18 per cent would see an increase in price. The adult monthly pass customers who do not use transit enough to reach the fare cap of 34 rides would pay, on average, \$65.00 a month compared to the proposed rate of \$95.20 per month.

### **Fare capping impacts on ridership**

As mentioned in section 6.2.6, fare increases may have a negative impact on ridership, but they are more accepted when users can see that their money is going towards creating a better transit network.

Generally, the industry standard is that a three per cent increase in fare prices will reduce ridership by one per cent. However, if the Fare Capping

Loyalty program is approved, there will be less of an impact to ridership than if the monthly pass is maintained. The ridership growth expected from the GTRAP service changes will offset the ridership loss from fare increases.

**Table 26. The impact to ridership for each fare category if monthly passes are maintained compared to if fare capping is implemented.**

<b>Fare category</b>	<b>Monthly Pass ridership impact</b>	<b>Fare Capping ridership impact</b>
Adult	(5.7) %	(2.9) %
Youth	(3.8) %	(1.9) %
Post-secondary	(3.8) %	(2.7) %
Senior	(3.8) %	(1.9) %

### **Implementation**

Fare capping would be rolled out to one category at a time and would not be mandatory until all fare categories had been transitioned. The transition period would be accompanied by an extensive communications campaign to ensure all customers understand how the Fare Capping Loyalty program works.

The Community Investment department is supportive of the Fare Capping Loyalty program and would explore fare capping for the Affordable Bus Pass program if approved by Council.

### **Financial impacts**

To implement the Fare Capping Loyalty program, there is an impact of \$(36,300) from the existing capital budget and no operating budget impacts. It is important to note that, regardless of whether fare capping is adopted, or traditional monthly passes are maintained, the fare prices should be increased to the proposed amounts. The amount of additional revenue the Fare Capping Loyalty program will generate is approximately \$10,000 in 2024 versus maintaining the traditional monthly pass program which will generate approximately \$329,000 in revenue.

### **6.3.2 Kids Ride Free program**

Due to the positive feedback received during the pilot, it is recommended that the Kids Ride Free program (children aged 12 and under) be permanently implemented.

Not only does the Kids Ride Free program provide affordable transit options for families with children, but by introducing children to transit early on, they become more comfortable with this mode of transportation and are more likely to become lifelong transit users.

From January 2020 to September 2022, there was a 15 per cent increase in youth and child boardings (ages 5-17 years old). Due to reporting limitations when the new EFMS was launched, staff were unable to accurately identify which boardings are associated with kids (ages 5 -12 years old) vs. youth (ages 13-17 years old). In addition, staff cannot determine the makeup of the 15 per cent as it could be due to COVID recovery boardings or new boardings associated with the Kids Ride Free pilot program.

**Table 27. Boardings by month (ages 5-17 years old).**

<b>Month</b>	<b>2020</b>	<b>2021</b>	<b>2022</b>
<b>January</b>	28,563	3,573	10,530
<b>February</b>	26,046	8,217	13,903
<b>March</b>	19,284	12,047	12,389
<b>April</b>	2,709	4,348	12,866
<b>May</b>	1,885	3,539	19,159
<b>June</b>	1,759	4,180	14,594
<b>July</b>	5,270	4,734	10,142
<b>August</b>	6,955	6,772	8,489
<b>September</b>	10,103	15,221	16,250
<b>October</b>	11,854	19,652	19,494
<b>November</b>	14,069	15,051	17,011
<b>December</b>	8,071	10,508	9,741
<b>Total</b>	<b>136,568</b>	<b>107,842</b>	<b>164,568</b>

Key findings from the community engagement showed that 90 per cent of survey respondents were supportive of making the program permanent. Additionally, respondents were asked if they could choose a single group to receive free fares, who would it be for? As this was an open-ended question, there were a range of responses, but the Kids Ride Free pilot program was the most popular choice with 30.4 per cent selecting this program. A second round of community engagement was conducted focusing only on customers taking part in the Kids Ride Free pilot program. The results of this survey showed that 90 per cent of respondents take transit nearly every day or a couple of times a week compared to only 70 per cent before the pilot began. All respondents were supportive of making the pilot program permanent (see

Self-service reload kiosks	Yes	Likely	<ul style="list-style-type: none"> <li>• Added option for reloading fare cards</li> <li>• Popular option in community engagement</li> </ul>
----------------------------	-----	--------	---

			<ul style="list-style-type: none"> <li>• Possibly reduce staff resources needed for reloading</li> </ul>
--	--	--	--

Appendix D: Public engagement results summary).

To implement the Kids Ride Free program permanently, there is a net cost of \$155,100 which is made up of a revenue loss of \$117,000 and an operating cost of \$38,100 for a staffing resource (see Section 7.3.3).

### **6.3.3 Corporate Pass program**

As the existing Corporate Pass program has not changed since the pilot program began in 2010, it is recommended that Transit develop a new Corporate Pass program that is expanded to a wider range of customers and the current program be phased out.

The new Corporate Pass program would allow local businesses and groups to enroll and offer monthly passes at discounted rate for their employees or group members. A business that signs up for the Corporate Pass program will pay for a minimum of 10 per cent of each Corporate Pass purchased by their employees, and Guelph Transit will pay for an additional 10 per cent, meaning employees will pay for, at most, 80 per cent of their monthly pass. This program is ideal for groups of frequent riders, such as those who commute to work at least 3-4 times per week via transit.

A survey was sent out to a select group of businesses to gauge their interest in signing up for the Corporate Pass program, and 62 per cent said they believed the Corporate Pass program would have a positive impact on employee attraction and retention. Similarly, a survey was open to the public to gauge their interest in the Corporate Pass program. Fifty-five per cent of respondents said they would use a Corporate Pass if it were offered by their employer and 38 per cent said they would be more interested in continuing to work for their employer if a Corporate Pass were offered.

While a formal Corporate Pass program agreement will be put together with the assistance of the City's Legal department, the following criteria must be met for a business or group to sign up for the program:

- The company signing the agreement must be a recognized business, corporation, or group (i.e., business association, condominium board, etc.).
- A minimum of 25 employees or group members must sign up for a Corporate Pass.
- The company must agree to pay for at least 10 per cent of each Corporate Pass purchased by an employee or group member.



- Participating employees must renew their Corporate Pass annually to continue receiving the discounted rate.
- The company must agree to set up a payroll deduction system to ensure payment for the passes is made at the start of each month.

It is recommended that Transit staff build the new Corporate Pass program to be launched in 2024. The new program has a projected annual budget impact of \$18,700.

### **6.3.4 Travel Training program**

The current Travel Training program is limited in scope and by the infrequent training sessions offered. It is recommended that Transit staff develop a diverse Travel Training program that meets the needs of various groups, such as seniors, people with disabilities, and newcomers.

As part of this recommendation, new customers that participate in the Travel Training program will be awarded an OnYourWay fare card loaded with free rides, up to the value of a monthly pass. Staff will be able to track if participants continued to use transit after taking the training, which will provide data on new ridership and on the success of the program.

## **6.4 Continuation of existing fare programs**

There are several existing fare programs that are recommended to be continued. The policies and eligibility requirements for these programs have been updated and outlined in the following section.

### **6.4.1 Required fare programs**

There are several fare programs that are required to be continued due to binding contracts and regulations.

#### **Personal Assistant for Leisure Activities (PAL) card**

The PAL card is issued to a person with a disability who requires assistance to ride transit, and the card allows their support person to ride with them for free. This is a requirement through O. Reg. 191/11, s. 38 (1).

In 2022, the annual ridership was 2,005 with a financial impact of \$(5,614).

To obtain a PAL card, an application form must be completed to ensure the person with a disability meets the eligibility requirements. Once the application has been approved, the applicant will receive an OnYourWay card free of charge. The PAL card provides unlimited rides for a customer's support person and must be renewed every 5 years so that inactive cards can be removed from the EFMS.

### **Retired Transit Operators Pass**

Upon retirement, Guelph Transit operators are awarded a lifetime transit pass that allows them to ride for free. The issuance of a free pass to retired transit operators is required under Article 28.02a of the CBA.

In 2022, the annual ridership was 252 with a financial impact of \$(706).

When an operator retires, they will receive an OnYourWay card free of charge. The retiree's card provides unlimited rides for the user and must be renewed every 5 years so that inactive cards are removed from the EFMS.

### **City of Guelph Employee Pass**

City of Guelph employees will continue to have the option of an annual or monthly transit pass, depending on the City facility they work in. All staff will be required to obtain an OnYourWay card at the standard price of \$5.

In 2022, the total ridership was 7,885 with a financial impact of \$(22,078).

Transit staff will work with Parking and Human Resources staff to expand and enhance the program. The program will be expanded as an option to all City employees, including summer students, co-op students, temporary, and casual part-time staff. Additionally, enhancements to the program will be explored, such as automatic payroll deductions and promoting the program to new employees as part of onboarding.

### **6.4.2 CNIB Pass**

The CNIB Pass program is recommended to continue as it provides increased independence to individuals with visual impairments and operates at a low financial impact.

In 2022, the annual ridership was 5,308 with a financial impact of \$(14,862).

If the program continues, CNIB cardholders will be required to show proof of eligibility to obtain an OnYourWay card enrolled in this program. Eligible customers will receive their fare card for free, and it will provide unlimited rides. Customers participating in this program must renew their card every 5 years so that inactive cards can be removed from the EFMS.

### **6.4.3 Veterans Transit Pass**

The Veterans Transit Pass program is recommended to continue in partnership with the Parking Pass program.

In 2022, the annual ridership was 4,822 with a financial impact of \$(13,502).

If the program continues, veterans will be required to show proof of eligibility to obtain an OnYourWay card enrolled in this program. Eligible customers will continue to only be able to have a transit pass or parking pass, not both. Those that choose the transit pass will receive their fare card for free, and it will provide unlimited rides. Customers participating in this program must renew their card every 5 years so that inactive cards can be removed from the EFMS.

## 6.5 Proposed fare payment options

While all existing fare payment options will continue to be available, it is recommended that these options be expanded to keep up with emerging technology, industry best practices, and the results of the community engagement campaign.

### 6.5.1 Debit/credit tapping

To keep the available fare payment options on buses up-to-date and encourage ridership among infrequent users, it is recommended that the option to pay a fare with a debit or credit bank card be introduced.

During the community engagement campaign, the tap to pay option was a popular choice among participants. 35.4 per cent of survey respondents selected debit/credit, Apple pay, and/or Android pay as a preferred method of payment when boarding the bus. Similarly, 32.8 per cent of open house respondents also chose a tap to pay option as a preferred method of payment (see

Self-service reload kiosks	Yes	Likely	<ul style="list-style-type: none"> <li>• Added option for reloading fare cards</li> <li>• Popular option in community engagement</li> <li>• Possibly reduce staff resources needed for reloading</li> </ul>
----------------------------	-----	--------	---

Appendix D: Public engagement results summary).

To ensure frequent riders are still rewarded with lower prices and to cover the transaction fee, it is recommended that the fare price for everyone paying with debit or credit be equal to the cash fare price (proposed to be \$3.25 starting in September 2023). Customers will be able to tap their card on the farebox and can pay using a debit card, credit card, Apple pay, or Android pay.

The cost to implement bank card fare payment on fareboxes is \$215,700 funded from the existing capital budget. Additionally, an operating budget in the amount of \$30,100 annually, starting in 2025, is required to maintain and operate this fare payment option. The operating budget request will be referred to the 2024 multi-year budget.

Once the introduction of bank card fare payments has been successfully implemented, staff will explore the possibility of fare capping with debit and credit cards as a future fare program.

### 6.5.2 Self-service terminals

In addition to expanded methods of payment on the bus, it is recommended that three self-service terminals be purchased for fare card reloading and installed in high traffic public locations.

During community engagement, respondents that currently reload a fare card in person at a City facility or retailer were asked if they would be willing to use a self-service terminal if it were available at City facilities. 60.6 per cent of respondents said they would choose to reload at the self-service machine over reloading with a customer service agent (see

Self-service reload kiosks	Yes	Likely	<ul style="list-style-type: none"> <li>• Added option for reloading fare cards</li> <li>• Popular option in community engagement</li> <li>• Possibly reduce staff resources needed for reloading</li> </ul>
----------------------------	-----	--------	---

Appendix D: Public engagement results summary).

The locations that the terminals are proposed to be installed at are ServiceGuelph in City Hall, the West End Community Centre, and the Victoria Road Recreation Centre. The terminals would be available to customers that currently have a registered OnYourWay fare card for reloading of single ride fares/e-tickets. The terminals would operate with an interface like an ATM and payment could be made using a debit or credit card.

The cost to implement the self-service terminals is \$77,600 funded from the existing capital budget. An additional operating budget of \$2,900 annually, starting in 2024, is required to maintain the terminals. The operating budget request will be referred to the 2024 multi-year budget.

Staff will monitor the usage of the terminals and will determine if there is a need for more terminals at other locations in the future.

## 6.6 Performance indicators

Through the 2019 Guelph Transit Business Services Review, the target net revenue to cost (R/C) ratio of between 40 and 45 per cent was approved. The 2021 Guelph Transit Future Ready Action Plan recommendation to pause the use of this metric until the Fare Strategy could be presented to Council was also approved.

It is recommended that the proposed fare increase schedule, supported by a more holistic set of performance indicators that considers service levels and aligns with the revenue budgeting policy and industry standards, be adopted. This recommendation supports a more comprehensive approach to determining fare pricing as the R/C ratio alone is not an effective indicator of total financial performance.

CUTA releases annual reports detailing a variety of performance metrics for transit agencies across Canada. The following metrics have been selected to be analyzed each year to ensure Guelph Transit is on par with the Council-approved municipal comparators.

- **Average fare:** The average fare paid by a customer. Calculated by comparing the regular service passenger revenue against the total regular service linked trips.
- **Cost effectiveness:** Calculated by comparing the total direct operating expense to the total regular service linked trips.
- **Municipal subsidy:** Funding provided from municipal property taxes to support the provision of transit services. Municipal subsidy is the difference between operating cost, revenue, and other recoveries.
- **Net cost:** The total annual cost to provide transit services. It includes all operating and maintenance, debt financing, capital, and revenue.
- **Net direct operating cost per regular service passenger:** The relationship between cost of service and ridership measuring cost effectiveness. The expense or cost (not including revenue) to provide service for each passenger that utilizes the service.
- **Net operating cost:** The operating costs incurred to provide transit service. This includes salary and wages as well as purchased goods and services. Operating cost does not include capital costs or debt financing.
- **Net operating cost per hour of operation:** Calculated by comparing the net direct operating costs against the total hours of operation.
  - Net operating cost, within the specific service breakdown, includes all operating costs with the exclusion of vehicle maintenance. There is no capability to separate the vehicle

maintenance data by specific service stream. However, vehicle maintenance is included in the overall Guelph Transit system performance analysis.

- **Operating revenue to cost ratio:** The relationship between the total revenue generated through operations to the total operating costs related to service delivery.
- **Revenue to cost ratio (R/C):** The relationship between the total revenue (service revenue and recoveries, such as the gas tax) generated through operations to the total costs (operating and capital) related to service delivery.
- **Service statistics:** Statistics to set the context of existing service levels to ensure proportionate comparisons.
  - Hours of service
  - Number of fixed routes
  - Number of routes by headway during off-peak time periods
  - Number of routes by headway during peak time periods
  - Revenue hours
  - Total fleet size
  - Total ridership
  - Total vehicle kilometres

While the fare pricing schedule will be the primary determining factor of when fare increases will occur, the schedule may be modified if metrics are showing that Guelph Transit is off track with municipal comparators.

## 7. Financial impacts

Staff have identified the financial implications of the Fare Strategy recommendations, including net costs, capital costs, and staff requirements.

### 7.1 Net cost

The net operating financial impact of the Fare Strategy in 2023 is \$5,200 in additional revenue and between 2024 to 2027 is an increase of \$151,900 for a total of \$157,100 in revenue which is partially offset by an increase in operating costs of \$75,400 resulting in an overall net reduction to the tax support of transit of \$81,700. If approved, these financial impacts would be included in the 2024-2027 multi-year budget. The largest driver of this impact is the Kids Ride Free Program with a net cost of \$155,100 which is made up of a revenue loss of \$117,000 and an operating cost of \$38,100 for a staffing resource.

**Table 28. Estimated revenue from the implementation of the Fare Strategy recommendations.**

<b>Revenue</b>	<b>2023</b>	<b>2024</b>	<b>2025</b>	<b>2026</b>	<b>2027</b>
Fare pricing changes	\$5,200	\$10,200	\$52,100	\$121,500	\$51,500
Corporate Pass program	-	\$18,700	\$1,600	\$400	\$500
Bus bay rentals	-	\$3,600	\$600	\$600	\$600
Bus charters	-	\$2,500	\$1,500	\$1,500	\$1,500
Kids Ride Free program	-	\$(117,000)	-	-	-
<b>Total</b>	<b>\$5,200</b>	<b>\$(82,000)</b>	<b>\$55,800</b>	<b>\$124,000</b>	<b>\$54,100</b>

**Table 29. Estimated expenses from the implementation of the Fare Strategy recommendations.**

<b>Expense</b>	<b>2023</b>	<b>2024</b>	<b>2025</b>	<b>2026</b>	<b>2027</b>
Kids Ride Free program (staff support)	-	\$38,100	-	-	-
Operating impacts from capital	-	\$2,900	\$30,100	\$2,100	\$2,200
<b>Total</b>	<b>-</b>	<b>\$41,000</b>	<b>\$30,100</b>	<b>\$2,100</b>	<b>\$2,200</b>

## 7.2 Capital investments

The total capital cost to implement the Fare Capping Loyalty program, bank card farebox payments, and self-service reload terminals is \$329,600. These projects would be funded by Transit's existing capital budget for EFMS enhancements (TC0076).

**Table 30. Capital costs of Fare Strategy projects.**

<b>Fare Strategy project</b>	<b>Capital cost</b>
Fare capping loyalty program	\$36,300
Bank card tapping farebox payments	\$215,700
Self-service reload terminals	\$77,600
<b>Total</b>	<b>\$329,600</b>

## **7.3 Staff resources**

To properly support the implementation of the recommended new fare programs, payment options, and technologies, the following staff are required.

### **7.3.1 Fare Media Coordinator**

To support the planning and implementation of new fare programs, a Fare Media Coordinator position is required beginning in 2024.

The Fare Media Coordinator will assist in the creation of new fare programs, setting up fare cards, coordinating fare card renewals, and managing and monitoring the success of new fare programs. The coordinator will also perform ongoing audits of customer accounts to ensure accuracy and completeness of information as well as function as a liaison with partner agencies, such as for the Corporate Pass program.

Guelph Transit had previously forecasted the need for this position and has a placeholder for it in 2024. The fare program recommendations from the Fare Strategy support the need for the Fare Media Coordinator position. The request for this position will be referred to the 2024-2027 multi-year budget.

### **7.3.2 Transit Technologist**

To support the implementation and ongoing maintenance of new payment options and new technologies, a Transit Technologist position is required in 2025.

With rapidly changing and emerging technology, Guelph Transit will soon reach a tipping point in which a fulltime staff member is needed to manage all fare technologies. The Transit Technologist will provide technical support for the implementation of debit and credit bank card tapping as fare payment and will keep staff up to date on the latest EFMS technologies. Additionally, the technologist will support the integration of the EFMS with Trapeze software, assist with the implementation of the self-service reload terminals, and provide troubleshooting for technical issues with the EFMS.

Guelph Transit had previously forecasted the need for this position and has a placeholder for it in 2025. The fare payment and program recommendations from the Fare Strategy support the need for the Transit Technologist position. The request for this position will be referred to the 2024-2027 multi-year budget.



### **7.3.3 Clerical Staff**

To support the permanent implementation of the Kids Ride Free program, a clerical staff resource is required in 2024.

If the Kids Ride Free program is made permanent, additional clerical support is required to assist with customer registration and enrollment, setting up fare cards, and providing ongoing customer service support.

An operating budget in the amount of \$38,100, starting in 2024, will be referred to the 2024-2027 multi-year budget for this staffing resource.

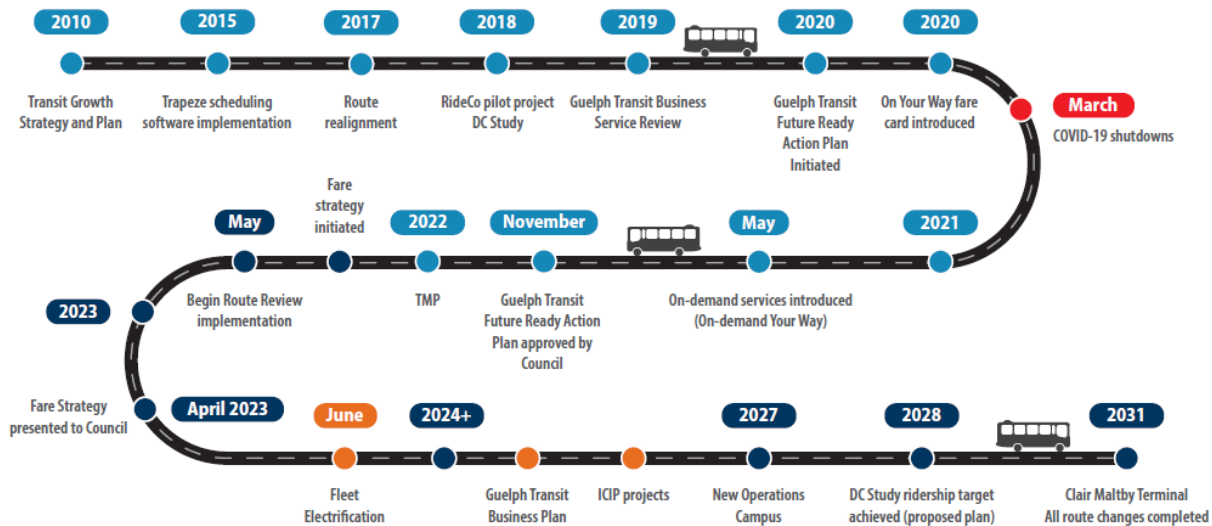
## **8. Looking to the future**

Guelph Transit has many exciting projects upcoming that the Fare Strategy will support, including ridership goals of the GTFRAP and the future Guelph Transit Business Plan.

It is important to note that the Fare Strategy document is not set in stone. While implementing the recommendations outlined, Transit will continue to explore ridership incentive programs, further enhance the customer experience, stay relevant in fare system technologies, and continuously engage with our customers.

Beyond the fare programs recommended in the Fare Strategy, staff will continue to explore new fare programs to incentivize ridership and meet the needs of the community.

Additionally, the fare pricing schedule has been determined up to 2031 to align with the changes made in the GTFRAP. Beyond 2031, fare pricing changes will continue to be aligned with future service expansions.



**Figure 2. Timeline of Guelph Transit's past and future projects from 2010 to 2031.**

## 9. Next steps

The Guelph Transit Fare Strategy is being provided to the City of Guelph Council for its consideration and approval to move forward with the implementation of the Fare Strategy recommendations.

It is recommended:

1. That the Kids Ride Free program (children aged 12 and under) outlined in Attachment 1, Section 6.3.2 to report PS-2023-102 be made permanent and that the budget impacts as outlined in report PS-2023-102 be included in the 2024-2027 Multi-year Budget.
2. That the Fare Capping Loyalty program, outlined in Attachment 1, Section 6.3.1 to report PS-2023-102, be approved and that the budget impacts as outlined in report PS-2023-102 be included in the 2024-2027 Multi-year Budget.
3. That staff be delegated the authority to proceed with the remaining initiatives recommended in Attachment 1 to report PS-2023-102.

### 9.1 Fare Strategy recommendations

The following are all 16 recommendations that were developed as a result of the Fare Strategy.

#### 9.1.1 Fare policies

##### 1. OnYourWay fare cards

All fare program users must have an OnYourWay fare card, except for U Pass users. New OnYourWay fare cards cost \$5 to purchase, unless otherwise specified, and replacement OnYourWay fare cards will cost \$5 for all users.

Eligible users of specialty free fare programs receive their first OnYourWay card free of charge. Users must renew their card every five (5) years. The following programs fall under this condition:

- CNIB card
- Veterans card
- Personal Assistant for Leisure Activities (PAL) card
- Retired Transit Operators' card
- Welcome to Guelph card (not eligible for renewal)

Eligible users of specialty discounted fare programs must renew their card annually. The following programs fall under this condition:

- City of Guelph Employee Pass
- Corporate Pass

## **2. Transfers**

The transfer time should always be equal to half of the longest route's cycle time, plus 15 minutes. Therefore, the transfer time should be maintained at 60 minutes.

## **3. Bus bay rentals**

The cost of renting a bus bay at Guelph Central Station will increase to \$770 per month per bus bay effective January 1, 2024, resulting in additional revenue of \$3,600 in 2024. The monthly bus bay rental rate will be reviewed annually and adjusted to keep pace with cost increases in the terminal budget.

## **4. Bus charters**

Bus charter rates will be reviewed and updated annually to match cost increases as outlined in the revenue budgeting policy.

## **5. Financial performance indicators**

A more holistic set of financial performance indicators, including the revenue to cost (R/C) ratio, which considers service levels and aligns with the revenue budgeting policy, should be adopted during the 2024-2027 multi-year budget. An annual review of the financial performance indicators will be conducted and measured against Guelph Transit's municipal comparators.

### **9.1.2 Fare programs**

#### **1. Kids Ride Free program**

The Kids Ride Free program (children aged 12 and under) should be made permanent at an annual net budget impact of \$155,100. An operating

budget in the amount of \$38,100 for clerical resources to support the program and a revenue loss of \$117,000 in 2024.

## **2. Corporate Pass program**

Transit staff will develop a new Corporate Pass program with an increase to budgeted revenue of \$18,700 in 2024. The existing program will be phased out and the new program will be launched in 2024.

## **3. Travel Training program**

Transit staff will develop a diverse Travel Training program to meet the needs of various groups, to be launched in 2024. The program will provide free rides to new customers taking part in the program (up to the value of a monthly pass). The program will be developed at no financial impact and will be offered by existing staff.

## **4. City of Guelph employee pass program**

Transit staff will work with Parking and Human Resources staff to enhance the user experience and expand the program so that all City employees are eligible, including casual part-time, co-op students, summer students, and contract employees.

City Hall staff, regardless of employment status, are eligible for a transit pass at 100 per cent discount; all other employees are eligible for a 50 per cent discount. The discounts are taxable benefits and are managed by Human Resources.

Based on historical enrollment in the program, it is assumed the program will continue to operate with minimal financial impact.

## **5. Fare Capping Loyalty program**

The traditional monthly pass program should be transitioned into a pay-as-you-go program, known as a Fare Capping Loyalty program, at a capital cost of \$36,300 funded from the existing capital budget (TC0076) and no operating budget impacts. The fare cap should be set at 34 rides for all fare categories.

If the Fare Capping Loyalty program is not approved, the monthly pass program should be maintained and prices should be increased to the proposed adult and concession fare cap maximum prices of \$95.20 and \$76.50, resulting in additional revenue of \$329,000.

## **6. TaxiSCRIP program**

The maximum number of taxiSCRIP coupon books that can be purchased each month be increased from two to three. The minor additional cost of \$6,300 can be accommodated within the existing operating budget.

### **9.1.3 Fare structure and pricing**

#### **1. Fare structure**

The flat fee age-based fare structure will be maintained, and the term concession fares will be adopted to refer to age-based discounts. All users eligible for concession fares will receive the same discount. These users are:

- Kids (if the Kids Ride Free program is not continued)
- Youth
- Post-secondary students
- Seniors

#### **2. Fare pricing (September 2023)**

The cash fare will be increased from \$3 to \$3.25, and the debit/credit bank card fare will be introduced at the same rate as cash (\$3.25).

The adult single ride fare will be maintained at \$2.80. The concession single ride fare will be maintained at \$2.25 and will be expanded to include post-secondary students (except for the University of Guelph students).

The adult monthly fare cap should be set to 34 rides, amounting to a maximum of \$95.20 per month. The monthly concession fare cap should also be set to 34 rides, amounting to a maximum of \$76.50 per month.

The day pass will be increased from \$8 to \$8.40, and the weekend pass will be eliminated.

#### **3. Fare pricing methodology**

The adult single ride fare price will always be the price that all other fare media prices are based upon, except for cash fare. The single ride fare will be increased by approximately two per cent every year, rounded to the nearest \$0.05 increment. Should costs increase significantly, a greater per-cent increase may be required to support the revenue budget policy.

Concession fares will always be 20 per cent less than an adult single ride fare, rounded to the nearest \$0.05 increment. The price of day passes will always be the equivalent of three adult single ride fares.

The cash fare will be increased in \$0.25 increments every two years. The debit and credit bank card fare will always be the same price as the cash fare.

All changes in prices will be aligned with the revenue budgeting policy.

### **9.1.4 Payment options**

#### **1. Self-service terminals**

Three self-service terminals will be purchased for fare card reloading (by debit or credit card), at a cost of \$77,600 funded from the existing capital budget. The terminals will be installed at:

- ServiceGuelph at City Hall
- West End Community Centre
- Victoria Road Recreation Centre

An operating budget in the amount of \$2,900 annually, starting in 2024, be a referred to the 2024-2027 multi-year budget.

## **2. Debit and credit fare payment**

Debit and credit bank cards should be accepted on buses, at a cost of \$215,700 funded from the existing capital budget, pending a supportive business case. An operating budget in the amount of \$30,100 annually, starting in 2025, will be referred to the 2024-2027 multi-year budget.

## **9.2 Implementation steps**

If approved, the goal is to begin implementation of fare pricing changes in September 2023 and implementation of fare programs and payment options in 2024. The estimated timeline is outlined below; however, it may need to change if unforeseen circumstances prevent implementation at the proposed time.

2023 fare system changes include:

- Transferring all programs to OnYourWay fare cards
- Implementing the standardized bus bay rental pricing
- Permanently implementing the Kids Ride Free program
- Updating and expanding the City of Guelph Employee Pass program
- Implementing the Fare Capping Loyalty program
- Updating the taxiSCRIP program
- Implementing changes to fare pricing

2024 fare system changes include:

- Introducing the fare pricing schedule and holistic set of financial performance indicators
- Updating and reintroducing the Corporate Pass program
- Updating and reintroducing the Travel Training program
- Installing the self-service reload terminals

2025 fare system changes include:

- Introducing debit and credit bank card fare payment on buses

Prior to implementation, Staff will need to undertake several tasks in preparation, such as:

- Developing a communications and promotions plan outlining how changes will be communicated to the public.
- Updating the EFMS with fare program and pricing changes.
- Purchasing the self-service terminals, farebox bank card capabilities, and fare capping capabilities.
- Updating internal materials for Transit staff.
- Updating external materials for the website and social media.

### **9.3 Monitoring process**

Once the implementation of the Fare Strategy recommendations has begun, Transit staff will monitor the performance of the fare system changes. The updated list of performance indicators will be used to conduct an annual review, and more frequent reviews as needed, to ensure Guelph Transit is staying on track with municipal comparators and towards meeting City goals.

Staff will continue to collect public feedback to ensure the Fare Strategy stays relevant and changes will be made where needed and where possible.

### **9.4 Conclusions**

With the City of Guelph rapidly growing and changing, a mode share shift is necessary to accommodate the travel needs of a larger population. Paired with the GTFRAP, the Fare Strategy will help build ridership to meet mode share targets set out in the Transportation Master Plan and the DC study. The Fare Strategy supports the City's plans, strategies and policies that aim for transit to be affordable and accessible. The recommendations outline the actions that Guelph Transit should take to modernize the fare system to meet these goals and make transit a more attractive option that meets the needs of current and future customers.

## Appendix A: Definitions

Term	Definition
Amalgamated Transit Union 1189 (ATU 1189)	This is the name of the operator's union and bargaining unit that negotiates with the City of Guelph/ Guelph Transit.
Bus charter or Charter	A bus that has been rented by a customer for transportation to and/or from an event.
Canadian Urban Transit Association (CUTA)	A national association for urban mobility and both the public and private transit industries in Canada. CUTA collects data annually from transit agencies nationwide to report back with a variety of metrics.
Collective Bargaining Agreement (CBA)	This is the contract that has been negotiated between the Amalgamated Transit Union 1189 union and City of Guelph (Guelph Transit). The CBA outlines items such as scheduling, overtime, vacation, grievances, and committees, among others.
Electronic Fare Management System (EFMS)	The automated calculation, validation, collection, recording and reporting of passenger fare payments using electronic media for rides on a transit system.
Guelph Transit Future Ready Action Plan (GTFRAP)	A Council-approved plan to deliver a more competitive, convenient, and reliable transit system that meets the community's needs today and beyond, over the next decade. It moves us closer to meeting goals set out in the City's Strategic Plan by improving connectivity of the whole transportation system—making it easy for people to travel within city limits.
Mode share / modal share	The number of trips completed by a specific mode of transportation, such as by car, transit, walking, and cycling.
Transportation Master Plan (TMP)	A Council-approved plan that lays out how residents and visitors will move through the city over the next three decades. The TMP is a long-range strategic plan that directs how Guelph's future transportation system will be built and operated and establishes policies and programs to guide the delivery of transportation infrastructure and services.



## Appendix B: Comparator transit agencies

Guelph Transit's Council-approved municipal comparator transit agencies are Barrie Transit, Brantford Transit, Burlington Transit, Kingston Transit, Oakville Transit, St. Catharines Transit Commission, GOVA (Greater Sudbury), Thunder Bay Transit, and Transit Windsor.

### 1. Fare review and strategy examples

Research was conducted to gather information on the various policies and programs Guelph's municipal comparators have in place.

#### 1.1 Barrie Transit

The following information was gathered via the Barrie Transit website and discussions with Barrie Transit staff.

##### **Fare increases**

Through discussions with Barrie Transit, it was discovered that staff have a 12-year fare pricing strategy in place in which there will be a ~1 to 2 per cent increase in pricing for fare media every 4 to 5 years. The fare media prices and schedule for fare increases were determined by referring to municipal comparators' practices and calculating increases to offset inflationary costs.

##### **Fare programs**

##### ***Kids aged 12 and under ride free***

This program was introduced in 2019 with the goal of getting children on the bus at an early age to increase their comfort level with the service and encourage them to become lifelong riders. A fare card is not required to ride; instead, operators track ridership manually on the fare box.

##### ***Free transit for seniors (aged 65+) on Thursdays***

This program was introduced in 2019 with the goal of increasing seniors' level of comfort using transit so they may take it more often on days when transit is not free. Initially, seniors rode free in the month of June, but community engagement results showed having free transit once a week was preferred.<sup>2</sup>

##### ***CNIB cardholders ride free***

Those that have a valid CNIB card can ride free by showing their card when boarding the bus.

---

<sup>2</sup> [Global News: Kids 12 and under to ride Barrie Transit for free, seniors to ride at no cost once a week.](#)

### ***GO Transit Co-fare discounts***

Those that are connecting to or from a GO train ride free on Barrie Transit by showing a valid PRESTO card or ticket.

### **Transfers**

In 2019, Barrie Transit increased their transfer time from 60 minutes to 75 minutes plus a 15-minute grace period. The intention of increasing the transfer time is so that users can complete a unidirectional trip using one fare.

## **1.2 Burlington Transit**

Burlington Transit's Five-Year Business Plan (2020-2024) includes some fare related strategies, which are outlined below.<sup>3</sup>

### **Fare structure and pricing**

Burlington Transit uses the smart fare card, PRESTO. Rather than loading rides or a monthly pass, cash is loaded onto the PRESTO card and can be used on any transit system that accepts PRESTO. When users ride with Burlington Transit, they tap their card and are charged the appropriate fare for one ride.

### ***Loyalty program***

Burlington Transit has a loyalty system in place to reward frequent riders. Each time a fare is paid using a PRESTO card, it will keep track of the number of trips taken. Once 39 full fare rides per calendar month have been reached, the user will not be charged for the rest of the month.

### **Fare programs**

#### ***Free transit for children (ages 12 and under)***

In 2019, GO Transit began allowing children aged 12 and under to ride for free. To allow for better system integration and more seamless travel, Burlington Council approved free transit for children aged 12 and under, which began on January 1, 2020. Since children aged 6 to 12 make up less than one percent of Burlington Transit's total ridership, there was not a significant impact to revenue by introducing this program.

#### ***Free weekday midday travel for seniors (ages 65 and over)***

This program began in 2019 as an 18-month pilot project where seniors travel free on transit from Monday to Friday between 9 a.m. and 2:30 p.m. The pilot program has been extended because senior boardings in the midday increased by 41 per cent between June 2019 and February 2020.

---

<sup>3</sup> [Burlington Transit Business Plan 2020 – 2024.](#)

Since the free fare period must also apply to specialized transit, an increase in use of this service was also observed.

### ***Subsidized Passes for Low-Income Transit (SPLIT) program***

In 2019, Council approved a change to the SPLIT program from a 50 per cent fare reduction to a free monthly pass for residents that qualify. 50 per cent of the passes are funded by Halton Region Social Services and the remaining 50 per cent is covered by the City of Burlington.

### ***Employer partnerships***

While Burlington Transit does not currently have any employer partnerships in place, the Business Plan recommended exploring partnerships with employers to offer an emergency ride home program, free or discounted passes, employer funded shuttles, and/or on-demand services.

## **1.3 GOVA Transit**

GOVA Transit (Sudbury) recently completed an Affordable Transit Fare Structure report that includes various industry best practices and policies.<sup>4</sup> The following are the relevant policies and programs outlined in this report.

### **Fare structure and pricing**

#### ***Cash fare***

Cash fares are used by infrequent customers, so the price should be higher than prepaid fares to reward regular users. Additionally, to improve simplicity, a base cash fare should be set that applies to all transit customers who choose to pay cash. For ease of use, cash fares should minimize the number of coins required, so increasing cash fares less often using \$0.25 increments is advisable.

#### ***Concession fares***

Target groups that will receive discounts need to be clearly identified. All target groups should receive equal discounts and be categorized under a concession fare to maximize equity across vulnerable groups and simplify the fare structure.

Those that are eligible for concession fares receive an approximately 15 per cent discount from the adult ticket prices and 15 per cent to 35 per cent discount from the adult monthly pass price.

Those categorized under concession fares as per GOVA Transit's policies include:

---

<sup>4</sup> [GOVA Transit Affordable Transit Fare Structure.](#)

- “Student” – a person who presents a current and valid student identification card from a high school or post-secondary educational institution.
- “Youth” – a person who is between the ages of 5 and 12.
- “Senior” – a person who is 65 years of age or older.
- “Disability pensioner” – a person who is a recipient of the Ontario Disability Support Program (O.D.S.P), Assistance for Children with Severe Disabilities (A.C.S.D), Canada Pension Plan Disability (C.P.P.D), Veteran’s Disability Pension or Canadian Institute for the Blind (C.N.I.B).

It should be noted that concession fare discounts do not apply to the base cash fare.

## **Fare media**

### ***Multi-ride cards***

It is best practice to create a reward system for frequent transit customers by implementing prepaid fares that are priced 20 per cent below the base cash fare or selling tickets at a rate that easily expresses value. GOVA Transit has implemented this by selling multi-ride cards with evident bulk buying discounts – buy 6 rides for the price of 5 rides.

The purchase of an adult multi-ride card does not require proof of eligibility. The purchase of a concession fare multi-ride card requires proof of eligibility.

### ***Monthly passes***

The largest discount should be applied to monthly passes since those purchasing these passes are the most frequent riders. The industry standard is to set the price of a monthly pass at 25-30 times the base cash fare rate. However, to provide affordable structure options rather than revenue generating options, the price should be set at 16-25 times the base cash fare rate.

The terms and conditions of a monthly pass should be clearly defined, including validity, transferability, and eligibility requirements. For example, a GOVA Transit monthly pass is valid for 31 days from the date of activation. Additionally, an adult monthly pass is transferable and does not require a photo identification card; however, a concession fare monthly pass is not transferable and requires a photo identification card.

The cost and requirements of purchasing a photo identification card or smart fare card should also be clearly defined. GOVA Transit charges a \$6 fee for the purchase of a photo identification card. Anyone eligible for concession fares is required to have a photo identification card. Photo identification cards expire every four years.

### ***Vendors selling fare media***

GOVA Transit allows retail locations to sell fare media if the retailer has signed a valid vendor agreement. The retailer will then receive a 1 per cent discount on the purchase of fare media for resale.

### **Fare increases**

Since fare increases are required to meet the rising cost of providing transit services, but they can also have a negative impact on ridership, it is best practice to link fare increases with the expansion of service. Transit customers are often less sensitive to fare increases if it means transit service is expanded because they can see what the additional cost is funding.

When increasing fares, cash fares should be increased in \$0.25 increments for ease of use while discounted fare media, like tickets and passes, should be increased in smaller increments each year.

### **Fare programs**

#### ***Employer Pass Program***

The Employer Pass Program offered by GOVA Transit was recently revised. To participate in the employer pass program, the following conditions must be met and/or agreed to.

- For an employer to qualify, the minimum commitment is to purchase 50 adult monthly passes over 6 consecutive months.
- The passes are provided at a 15 per cent discount from the regular price of an adult monthly pass.
- The passes must be distributed via a payroll deduction program administered by the employer.

#### ***Support Person Assistance card***

As per the AODA, persons with disabilities requiring assistance can have a support person accompany them on transit for free. Many transit agencies, including GOVA Transit, require the person with a disability to obtain a Support Person Assistance card via an application process to prove eligibility. The card belongs to the person requiring assistance and allows one support person to travel free of charge. Riders that are eligible for specialized transit services do not require a support person assistance card to have a support person accompany them.

### **Transfers**

GOVA Transit offers transfers with the payment of cash or a multi-ride fare card. The transfer time was recently increased from 60 minutes to 90 minutes and direction of travel restrictions were removed. This ensures a rider can complete their trip when transferring between routes, but also acts

as an incentive for users to complete errands without paying a fare for the second time to continue their trip.

### **Promotion and education**

Transit promotion and education is a key piece in supporting ridership growth.

#### ***Travel training classes***

Travel training, or travel familiarization classes, equip new public transit users with the confidence and knowledge needed to travel more independently. A session would be held with in-class and on-the-road components to accommodate different learning styles and abilities. Examples of target groups for travel training include school age students, people with disabilities, senior citizens, and newcomers to the city. All participants would receive a five-ride card for free as well as a free photo identification fare card that can be loaded with a monthly pass. The use of the five-ride card can be tracked by the farebox to track the success of the program.

The program would be run by a supervisor and supported by transit operators that have been trained as travel training ambassadors. This program requires an annual allocation of \$10,000, with the operating cost of one class being approximately \$300.

#### ***Promotional events***

GOVA Transit has received requests from many community events looking to partner and promote transit use among people who do not currently take transit. As such, the following partnerships have been identified as eligible for free or discounted transit service:

1. Groups participating in not-for-profit or school board related events will be given free access to transit. The group will be given a letter from the Director of Transit Services that allows the group to board the bus for free.
2. Community events with for-profit organizations will be given the opportunity to cost share via the "Ride the Bus for \$1" initiative. To cover the cost of the fare, the user pays \$1 when boarding the bus, the organization pays \$1, and the City subsidizes the rest of the cost. In exchange for the subsidy provided by the City, the organizer must provide proof that the "Ride the Bus for \$1" initiative has been advertised.

## **Performance metrics**

To ensure the success of new fare policies, it's important to have performance standards in place and to conduct regular program reviews. One method of measuring success is to use farebox data to record different types of fare payments to keep track of passenger classifications and the uptake of new fare programs.

## **1.4 Kingston Transit**

The Kingston Transit 5 Year Business Plan (2017-2021) includes fare strategies for attracting new riders and making transit more affordable.<sup>5</sup> Relevant strategies have been outlined below.

### **Fare structure and programs**

#### ***Kids 14 and under ride free***

In the Business Plan, Kingston Transit recommended that the "child" fare category, which allowed children aged 5 and under to ride free, be expanded to include children aged 12 and under. This would be beneficial to adults and caregivers as they would be able to take transit without having to pay the fare for their children to ride with them. However, Council voted to expand the program so that children aged 14 and under ride free.

#### ***Expanded "youth" category***

The Kingston Transit Business Plan also recommended that the "youth" fare category, which included those aged 13 to 18, be expanded to include passengers between the ages of 13 to 24. The goal of this expansion was to encourage young adults to ride transit by offering the service at a discounted price for longer in hopes that these riders would continue using transit long into adulthood.

As the "child" fare category was extended to be those aged 14 and under, the "youth" fare category was changed to include those aged 15 to 24.

#### ***Free transit for high school students***

In addition to the discount high school students receive for falling into the "youth" category, registered high school students are eligible to ride Kingston Transit for free. The goal of this program is to expose youth to the benefits of public transit at a young age, so they continue taking transit into adulthood.

Grade 9 students receive an annual bus pass after completing a transit training session at school. Grade 10-12 students will have their passes automatically renewed each year. Grade 12 students that return for an

---

<sup>5</sup> [Kingston Transit 5 Year Business Plan 2017-2021.](#)

additional year of studies are required to contact Kingston Transit with proof of enrollment to have their bus pass renewed.

From discussions with Kingston Transit, this is an important program because the yellow school bus program in Kingston is limited, meaning many students rely on public transportation to get to and from school. Kingston Transit funds this program using gas tax revenue that has been allotted to the operations budget.

### ***Affordable transit monthly pass***

Through the Business Plan, the subsidy for the affordable transit monthly pass was increased from 35 per cent to 50 per cent to ease the financial burden of paying for transit on low-income passengers.

### ***CNIB cardholders' discount***

Kingston Transit charges \$0.10 per ride when a valid CNIB card is presented. An annual pass for CNIB cardholders costing \$25 per year was established through the Business Plan. Passengers are required to present their CNIB card when purchasing or renewing the annual pass.

### ***Fare pricing and increases***

Under the Business Plan, fare increases were set for every three years to ensure revenues are keeping pace with inflationary cost increases.

The cash fare will be increased by 25 cents every three years to account for inflationary increases of two per cent per year. The prices of multi-ride cards and day passes will also be increased to maintain relative price ratios with the adult cash fare.

The price of an adult monthly pass will be increased every three years to account for inflationary increases of two per cent per year. The price of youth and senior passes will be adjusted as well to maintain the relative price ratio to the adult monthly pass.

## ***Education***

### ***Travel training program***

Kingston Transit runs travel training sessions for those that are new to transit. Those that participate in a formal travel training session will receive a one-month pass, or the equivalent, as an incentive to participate and start regularly using transit.



## 1.5 Thunder Bay Transit

Through discussions with Thunder Bay Transit, staff are in the process of developing a new fare strategy. Below are items they will be exploring through their fare strategy.

### **Fare structure**

Alternative fare structures will be explored through the fare strategy, including:

- Free transit rides for certain demographics, such as children 12 and under, low-income residents, and/or seniors.
- Free rides or discounted fares at certain times of the day, week, or month.
- Revamped affordable monthly pass system for low-income residents.

### **Fare media**

New fare media sales locations and requirements will also be explored, including:

- Requiring every fare product retail sales agent to carry and sell the full range of fare products
- Selling high school monthly and semester passes through school boards
- Setting up autorenewal of monthly passes and expanding payment options

## 1.6 Transit Windsor

Transit Windsor completed a Fare Structure and Strategy Review in 2018 that recommended various changes to the fare system, which are outlined below.<sup>6</sup>

### **Fare structure and pricing**

The fare structure lists all the various fare rates applicable for different transit rider categories. The structure should be based on the price for a single base adult trip and when this price changes, all fare category prices will change.

For example, Transit Windsor offers tickets at a 15 per cent discount on the single ride cash fare. Additionally, passes are offered at a price that is based on the base cash fare multiplied by a specific number of trips. The day pass is offered at three times the price of the single ride cash fare and the adult monthly pass is offered at 32 times the price of the single ride cash fare.

---

<sup>6</sup> [Transit Windsor Fare Structure and Strategy Review.](#)

### ***Concession fares***

Concession fares are discounts provided to defined groups, such as low-income individuals, people with disabilities, children, students, and/or seniors.

Those that are eligible for concession fares receive an approximately 20 per cent discount from the adult ticket price and 30 per cent to 50 per cent discount from the adult monthly pass price.

Those categorized under concession fares as per Transit Windsor's policies include:

- "Youth" – anyone between 13 and 19 years old. Valid government identification is required to purchase youth classed fare media.
- "Senior" – anyone 60 years and older.

Discounts for University of Windsor students were removed as part of the Fare Review because a U Pass agreement was introduced that offers students a semester pass loaded onto a smart card if their tuition and fees have been paid.

### ***Loyalty programs***

The Fare Review recommended that monthly passes be replaced with 30 day rolling passes for enhanced flexibility and convenience for riders. While this was implemented, a 15-day rolling pass was also implemented by Transit Windsor.

### ***Fare media***

It was recommended through the Fare Review that paper tickets and passes be replaced with smart cards and mobile ticketing. This was implemented to make it easier to implement the rolling monthly pass as well as to collect better proof of payment and ridership class data. Cash and paper transfers are still accepted.

### ***Fare increases***

Transit Windsor has scheduled fare increases of two per cent per year for five years (2019-2023) to keep up with the expected rate of inflation. Each year, the price of all fare products is increased by two per cent, rounded to the nearest \$0.05 increment. The scheduled increases were approved by Council through the Fare Review.

## **Fare programs**

### ***Kids Ride Free program***

The Fare Review recommended that the “child” fare category, which encompassed children aged 4 and under at the time, be expanded to allow children aged 12 and under to ride free when accompanied by an adult.

The reasoning behind this change was to encourage parents to take transit instead of driving their kids around as well as to introduce children to transit early on, making them more likely to become lifelong riders.

The financial analysis of this program showed there would be a limited impact on revenue and there would be no need to add service to accommodate the change because children aged 5-12 only accounted for 2.3 per cent of system trips in 2016.

As such, Council approved this recommendation.

### ***Affordable Pass Program***

The Affordable Pass Program (APP) allows recipients of the Ontario Disability Support Program (ODSP), Ontario Works (OW), and individuals with income below the Low-Income Cut-off (LICO) to apply to APP.

To ensure all fare types are available to riders, a single ride ticket price and daily pass option were added to APP. Doing so helps those that qualify for APP reduce the burden of paying for a monthly pass up front. Additionally, it is best practice to make all fare options available to all user groups, so riders have the flexibility to load their fare card with the media that makes the most sense for their needs.

## **Transfers**

Transit Windsor maintained time-based transfers through their Fare Review and kept the transfer time at 120 minutes.

## 2. Fare Comparison

**Table 31. Comparison of 2023 fares and transfer times between municipal comparators.**

	<b>Barrie</b>	<b>Brantford</b>	<b>Burlington</b>	<b>Kingston</b>	<b>Oakville</b>	<b>St. Catharines</b>	<b>Sudbury</b>	<b>Thunder Bay</b>	<b>Windsor</b>	<b>Average</b>	<b>Guelph</b>
<b>Cash</b>	\$3.25	\$3.00	\$3.50	\$3.25	\$4.00	\$3.00	\$3.50	\$3.00	\$3.15	\$3.27	\$3.00
<b>Adult ticket</b>	\$2.80	\$2.45	\$2.75	\$2.75	\$3.25	\$2.65	\$2.92	\$2.50	\$2.68	\$2.74	\$2.80
<b>Youth ticket</b>	\$2.45	\$2.45	\$1.90	\$2.25	\$2.55	\$2.20	\$2.50	\$2.50	\$2.10	\$2.33	\$2.25
<b>Senior ticket</b>	\$2.10	\$2.45	\$1.90	\$2.25	\$2.10	\$2.20	\$2.50	\$2.50	\$2.10	\$2.25	\$2.25
<b>Kid ticket</b>	Free	Free	Free	Free	Free	Free	\$2.50	Free	Free	N/A	Free
<b>Adult pass</b>	\$89.00	\$73.50	\$104.50	\$80.00	\$136.50	\$85.50	\$88.00	\$80.00	\$101.55	\$90.46	\$80.00
<b>Youth pass</b>	\$68.25	\$55.50	\$72.20	\$59.50	\$87.20	\$63.00	\$75.00	\$55.00	\$70.00	\$65.97	\$68.00
<b>Senior pass</b>	\$53.00	\$55.50	\$72.20	\$59.50	\$65.40	\$63.00	\$56.00	\$55.00	\$51.40	\$57.80	\$68.00
<b>Kid pass</b>	Free	Free	Free	Free	Free	Free	\$56.00	Free	Free	N/A	Free
<b>Day Pass</b>	\$9.50	\$9.50	N/A	\$8.25	N/A	\$7.25	\$10.00	N/A	\$9.60	\$8.87	\$8.00
<b>Transfer time (mins)</b>	75	60	120	60	120	120	90	90	120	86	60

### 3. Survey

A 14-question survey was sent to comparators in March 2022 to assist with the development of Guelph Transit's Fare Strategy. Responses were received from eight of nine comparators. The questions and responses are detailed in the below tables.

**Table 32. What triggers a fare increase at your transit agency?**

Transit agency	Question 1 response
Barrie Transit	Fare Strategy to offset inflationary costs.
Brantford Transit	No set triggers.
Burlington Transit	Increases to service levels and frequency.
Kingston Transit	Business Plan scheduled increases.
Oakville Transit	Annual increases to cover increasing costs.
GOVA (Greater Sudbury)	Annual service review triggered by user fee bylaws. Increases based on service level increases and cost efficiency.
Thunder Bay Transit	Triggered by Fare Strategy.
Transit Windsor	Fare Structure Review scheduled annual increases.

**Table 33. When was your agency's last fare increase? What was the percentage of your agency's last fare increase?**

Transit agency	Question 2a response	Question 2b response
Barrie Transit	2019	Cash fare increased by \$0.25 (8.3%)
Brantford Transit	2017	Cash fare increased by \$0.25 (9.1%)
Burlington Transit	2015	Cash fare increased by \$0.25 (8%); \$0.05 increase on PRESTO e-ticket fares
Kingston Transit	2020	Monthly pass increased by \$4 (5.25%); all other increases based on monthly pass
Oakville Transit	2018 (cash); 2022 (PRESTO)	Cash fare increased by \$0.25 (6.67%); \$0.05 annual increases to PRESTO e-tickets (1.98%)
GOVA (Greater Sudbury)	2019	Cash fare increased by \$0.20 (6.1%); ticket price increased by \$0.32 (12%)
Thunder Bay Transit	2020	Cash fare increased by \$0.25 (9.1%); ticket price increased \$0.30 (13.7%)

Transit agency	Question 2a response	Question 2b response
Transit Windsor	2022	Cash and ticket fare increased by \$0.05 (2%); monthly pass increased by ~\$2 (2%)

**Table 34. Do you do small annual fare increases (i.e., 1-2%) or larger, infrequent increases (i.e., 5% every 5 years)?**

Transit agency	Question 3 response
Barrie Transit	Cash: \$0.25 increase every 4 years Monthly pass: \$0.50-\$1 increases annually
Brantford Transit	Neither
Burlington Transit	Neither
Kingston Transit	Larger increases every 3 years
Oakville Transit	Small annual increases
GOVA (Greater Sudbury)	Neither
Thunder Bay Transit	Cash: \$0.25 every 5 years Other fare media: small annual increases
Transit Windsor	2% annually for all fare media

**Table 35. What fare elasticity do you use in your revenue and ridership projects?**

Transit agency	Question 4 response
Barrie Transit	For every 5% increase in price, ridership will decrease by 1%
Brantford Transit	N/A
Burlington Transit	Industry standards
Kingston Transit	N/A
Oakville Transit	N/A
GOVA (Greater Sudbury)	N/A
Thunder Bay Transit	For every 3% increase in price, ridership will decrease by 1%
Transit Windsor	N/A

**Table 36. What was the breakdown of your funding sources, pre-covid, by percent?**

<b>Transit agency</b>	<b>Question 5 response</b>
Barrie Transit	61% municipal tax, 20% fares, 7% U Pass, 10% Provincial Gas Tax, 2% advertising
Brantford Transit	-
Burlington Transit	38% municipal tax, 34% fares, 24% provincial contribution/gas tax, 3% advertising
Kingston Transit	-
Oakville Transit	67% tax, 30% fare box, 3% other (advertising, charters)
GOVA (Greater Sudbury)	Taxes, fares, U Pass agreement, advertising, SRA, gas tax, and ICIP
Thunder Bay Transit	59% municipal contribution, 35% fares (75% regular fares, 25% U Pass), 4% gas tax, 1% advertising/charters, 1% provincial grants
Transit Windsor	~50% farebox, ~50% municipal funding, small percentage is U pass and advertising

**Table 37. Do you have a Fare Coordinator, or an employee with a similar title, which is responsible for everything fare related?**

<b>Transit agency</b>	<b>Question 6 response</b>
Barrie Transit	Manager of Business Services
Brantford Transit	Transit Supervisor and Transit Manager
Burlington Transit	Business Services group
Kingston Transit	Secretary and IT Project Manager
Oakville Transit	No
GOVA (Greater Sudbury)	No
Thunder Bay Transit	Supervisor, Customer Care/Admin, and the Manager of Transit
Transit Windsor	Executive Director of Transit and the Sales and Marketing manager

**Table 38. What payment options do you offer?**

<b>Transit agency</b>	<b>Question 7 response</b>
Barrie Transit	Cash and paper fare media.

<b>Transit agency</b>	<b>Question 7 response</b>
Brantford Transit	Cash, smart fare card, and transfers.
Burlington Transit	Cash fare and PRESTO fare cards. Paper tickets for non-profits only.
Kingston Transit	Smart card, tickets, cash, and mobile app.
Oakville Transit	Payment by cash, PRESTO e-tickets, PRESTO card. Paper tickets and passes for social service agencies only.
GOVA (Greater Sudbury)	Cash and ride cards.
Thunder Bay Transit	Cash fares, paper tickets, annual senior bus passes and monthly passes.
Transit Windsor	Smart cards, paper tickets, and cash.

**Table 39. Where/how can customers purchase transit fare media?**

<b>Transit agency</b>	<b>Question 8 response</b>
Barrie Transit	Bus terminal, Service Barrie, recreation centres, and Georgian College.
Brantford Transit	Transit terminal.
Burlington Transit	Burlington Transit terminal. PRESTO card users can purchase/load at any GO transit station, Shoppers Drug Mart, or online.
Kingston Transit	Various City and retail outlets
Oakville Transit	PRESTO cards - online, GO Stations, and transit facility. Paper tickets and paper passes only available through transit office.
GOVA (Greater Sudbury)	Transit kiosks, various corner stores, and City facilities.
Thunder Bay Transit	Main Transit office and 25 retail outlets around town.
Transit Windsor	Transit Terminals, contracted vendors, and community care centers.

**Table 40. Do you use a fixed fare structure model where the price of youth, senior, and/or affordable monthly passes always costs the same percentage of the adult monthly pass?**

<b>Transit agency</b>	<b>Question 9 response</b>
Barrie Transit	Discounted fares are increased in a similar proportion but are not a fixed discount from the adult fare.
Brantford Transit	No fixed fare model.



<b>Transit agency</b>	<b>Question 9 response</b>
Burlington Transit	No fixed fare model - increases can be 5 to 25 cents.
Kingston Transit	Generally, yes.
Oakville Transit	-
GOVA (Greater Sudbury)	No fixed fare model.
Thunder Bay Transit	Generally, yes.
Transit Windsor	Generally, yes.

**Table 41. What ridership incentive programs do you have?**

<b>Transit agency</b>	<b>Question 10 response</b>
Barrie Transit	U Pass (Georgian College), children 12 and under ride free, and seniors ride free on Thursdays.
Brantford Transit	U Pass and sponsored free rides to events.
Burlington Transit	Loyalty program, in which after the 38th transit ride, transit is free for the rest of the month, and seniors ride free midday weekdays.
Kingston Transit	High school students, ODSP clients, Ontario Works clients, and children 14 and under ride at no cost. Post-secondary student reduced term pass/U pass. Employee Pass Program with discounted monthly pass.
Oakville Transit	Seniors ride free on Mondays and Youth Freedom Pass.
GOVA (Greater Sudbury)	U Pass and employer pass.
Thunder Bay Transit	U Pass, ticket to ride program for local events/festivals, school/daycare travel program, and First Nation Secondary School Pass.
Transit Windsor	U Pass, Corporate Valu program – 15% discount, Affordable Pass – based on LICO, International Fireworks sponsorship providing free rides to the downtown area, and Frequent Rider Contest.

**Table 42. If kids 12 and under ride free on your transit system, how do you track their usage? Have you seen an increase in ridership in this age group since introducing the free fare program?**

<b>Transit agency</b>	<b>Question 11 response</b>
Barrie Transit	Operators track trips through button on fare box; yes, have seen an increase in ridership.

<b>Transit agency</b>	<b>Question 11 response</b>
Brantford Transit	Drivers press button on fare box.
Burlington Transit	Recommended to obtain PRESTO card. If a child does not have a PRESTO card, driver tracks through button on fare box. Yes, ridership has increased for this age group.
Kingston Transit	14 and under ride for free. No pass required. Trips tracked manually on farebox by bus operator. Yes, have seen an increase in adult ridership linked to 14 and under ride for free.
Oakville Transit	Yes, kids 12 and under ride free. We encourage everyone to use a PRESTO card.
GOVA (Greater Sudbury)	Children 5 and under ride free. Press button on fare box to track.
Thunder Bay Transit	Children 12 and under ride free to begin April 1, 2022. Press button on fare box to track.
Transit Windsor	Track using fare box override button. Difficult to determine ridership impacts because introduced program during pandemic.

**Table 43. Do you have a municipal Corporate Pass program for City employees? If so, what is the rate?**

<b>Transit agency</b>	<b>Question 12 response</b>
Barrie Transit	Yes, 30% discount from adult fare.
Brantford Transit	No
Burlington Transit	City staff offered transit passes in lieu of parking passes.
Kingston Transit	City staff eligible for employer pass program rate.
Oakville Transit	Smart Commute program - Town of Oakville employees have access to transit passes at a 50% discount.
GOVA (Greater Sudbury)	No, falls under employer pass.
Thunder Bay Transit	No. Free transit for current/retired operators and spouses.
Transit Windsor	The Corporate Valu program has been extended to City employees at a 15% discount.

**Table 44. What is the current level of service you are offering, and are these pre-covid levels? If not, what was your pre-covid service vs. now?**

Transit agency	Question 13 response
Barrie Transit	-
Brantford Transit	Currently: Half hour service – 6 a.m. to 9 a.m. Hourly night service at 8 p.m. and on Saturday and Sunday. Pre-covid: half hour service Monday-Saturday, hourly night service at 9 p.m.
Burlington Transit	Our current (modified) service levels are mainly 30- and 60-min frequency, with some peak only service and 15 min frequency on Route 1.
Kingston Transit	About 85% of pre-COVID service.
Oakville Transit	Approximately 75% of our pre-COVID service level.
GOVA (Greater Sudbury)	At 90% of pre-COVID service.
Thunder Bay Transit	Currently we are at 92% of pre-pandemic levels.
Transit Windsor	"Saturday" level of service which is about 70% of regular service.

**Table 45. What is your transfer time? Has it always been this length? What is your reasoning for choosing this length of time? Do you allow bidirectional travel with a transfer?**

Transit agency	Question 14 response
Barrie Transit	75 minutes plus a 15-minute grace period. Transfer time increased 15 minutes in 2019 as per the fare strategy. Intent is for one complete trip (not bidirectional).
Brantford Transit	Transfer time is one hour. It has been this length since at least 2016. Yes, bidirectional travel is allowed.
Burlington Transit	We follow and use the PRESTO transfer window which is 2 hours. Riders can transfer on any bus during that 2-hour transfer window.
Kingston Transit	60 minutes in a single direction.
Oakville Transit	We use a two-hour transfer window that permits travel in any direction during the 2-hour time frame. It has been this length for over 15 years.
GOVA (Greater Sudbury)	Transfers used to be 30 minutes, but we have now moved to a 90-minute transfer allowing people a little more time.

Transit agency	Question 14 response
Thunder Bay Transit	Currently, the transfer time is 60 minutes and is changing to 90 minutes effective April 1, 2022. Transfers allow for bidirectional travel.
Transit Windsor	Transfer times are 2 hours any direction.

## Appendix C: Case studies and best practices

### 1. Case studies

#### 1.1 TransLink, Metro Vancouver, British Columbia, Canada

TransLink services the Metro Vancouver area with trains, buses, and ferries. TransLink completed a public transit Fare Review in 2018 that made recommendations for changes to the fare system<sup>7</sup>. Using information collected on the website and through the Fare Review report, the following examples from the fare system have been reviewed and considered.<sup>8</sup>

##### 1.1.1 Fare structure

Although the Fare Review recommended switching to a distance-based method of fare pricing, TransLink still uses flat fares for conventional and specialized bus transit service. Additionally, for rapid transit, train, and boat transit service, a zone-based fare system is used where different prices are applied when travelling within or between zones.

---

<sup>7</sup> [TransLink: Fares.](#)

<sup>8</sup> [TransLink Fare Review: Final Recommendations.](#)



**Figure 3. Map of TransLink fare zones posted online.**

### **1.1.2 Fare pricing**

TransLink increases fares annually to keep up with inflation and maintain the current transit while working towards achieving long-term financial sustainability. In 2022, all transit fares were increased by 2.3 per cent.<sup>9</sup>

#### ***Concession fares***

Passengers who are eligible for concession fare discounts may pay with cash, stored value on a fare card, or a monthly pass on a fare card.

Those categorized under concession fares as per TransLink's policies include:

- "Children" – a person aged 12 and under.
- "Youth" – a person aged 13 to 18. Valid photo ID to prove age is required.
- "Senior" – a person aged 65 years and older. Valid photo ID to prove age is required.
- HandyCard holders – a person who cannot use conventional transit without assistance who has been given a photo identification card (HandyCard) allowing them to ride conventional transit at concession fare prices with an attendant who rides for free.

<sup>9</sup> [TransLink: Annual fare change begins July 1.](#)

## ***Transfers***

The Fare Review recommended keeping the existing transfer time of 90 minutes, which has been maintained. Transfers are automatically applied when a card or ticket is first tapped when boarding.

### **1.1.3 Fare programs**

#### ***Children 12 and under ride free***

As of September 1, 2021, children aged 12 and under can ride TransLink transit services for free. This change is aimed at making transit more affordable for families in Metro Vancouver.

Children must be accompanied by a fare paying passenger possessing proof of payment to ride for free on train and boat transit service; however, children may ride free unaccompanied on bus transit. Additionally, a maximum of four children can travel free per paying passenger.

#### ***Fare donation program***

Transit users may donate their old fare cards back to TransLink to have the remaining value converted into transit passes to help children, families, and seniors at United Way.

#### ***TransLink for Organizations***

TransLink for Organizations is a program that Metro Vancouver businesses can enroll in to offer discounted transit services to their employees. Employers can choose whether to offer stored value or monthly passes to their employees and can choose how much of the cost they would like to offset.

For stored value, employers can choose to offset between \$10 and \$175 per month, and for a monthly pass, employers can choose to offset between 10 per cent to 100 per cent per month. The employees are responsible for paying the remainder of the cost, which must be paid through automatic payroll deductions.

As there is not a subsidy offered by TransLink for this program, there is no minimum number of employees required to enroll to make the employer eligible.

#### ***Transit Friendly Employer Certification***

Employers that participate in the TransLink for Organizations program may be eligible for the Transit Friendly Employer Certification.

The certification program recognizes employers that are working towards a more sustainable future by making travel for their employees easier, more affordable, and more climate friendly.

The minimum requirements for an employer to qualify for certification is as follows:

- A transit subsidy of at least 50 per cent must be provided
- Employers with 200+ employees must enroll at least 10 per cent of staff in the program for a minimum of six months to qualify
- Employers with less than 200 employees must enroll at least 25 per cent of staff to the program with no minimum time commitment

Employers that have qualified for the certification program can market themselves with the official Transit-Friendly Employer stamp and will receive free advertisements through TransLink's communication channels for leading the way to a more sustainable future.

#### **1.1.4 Fare payment options**

The following payment options are available on all TransLink transit services:

- Cash – coins and bills inserted in the farebox when boarding
- Ticket – purchased from a ticket vending machine and tapped on the farebox when boarding
- Fare card – a reusable fare card that can be preloaded with stored value, a day pass, a monthly pass, and/or a U Pass and tapped on the farebox when boarding
- Debit card – tapped on the farebox when boarding
- Credit card – tapped on the fare box when boarding
- Transfer – re-tapping the card that was first tapped on the farebox within the 90-minute transfer time.

## **1.2 Public Transport Council, Singapore**

The Public Transport Council (PTC) of Singapore oversees all methods of public transportation, including transit, within the country. In terms of transit, the PTC makes decisions on fare structure and pricing, which have been discussed below.<sup>10</sup>

### **1.2.1 Fare structure**

The PTC uses a distance-based fare structure in which riders are charged based on how many kilometres they are travelling. They are also charged based on what kind of transit they are using – trunk bus route, feeder bus route, express bus route, metro rail, or light rail transit.

---

<sup>10</sup> [Public Transport Council.](#)

### 1.2.2 Fare pricing

#### ***Fare incentives***

To help with weekday morning crowding on transit, the PTC introduced pre-peak fare discounts to encourage more commuters to travel earlier. Users that tap their card before 7:45 a.m. on weekdays automatically receive a 50-cent discount on their fare for that trip.

#### ***Fare increases***

The PTC has a Fare Regulation Framework in place that guides the annual fare review. It uses a complex fare formula that considers a variety of factors when making decisions on how much the fares can be adjusted.

The formula is:

$$\text{Maximum Fare Adjustment} = 0.5\text{Ccpi} + 0.4\text{WI} + 0.1\text{EI} - 0.1\% + \text{NCF}$$

Where:

- cCPI = the change in Core Consumer Price Index
- WI = the change of Wage Index in average monthly earnings over the preceding year
- EI = Energy Index, which is a composite of cost changes in electricity and diesel
- 0.1% = Productivity Extraction factor set for 2018 to 2022
- NCF = Network Capacity Factor, which is the capacity relative to passenger demand for the entire public transport system

The result of the fare review tends to be an increase of several cents to fares. For example, the 2022 fare review resulted in a 4-cent increase to adult fares on trips that are greater than or equal to 8.2 kilometres in distance and a 5-cent increase for trips that are greater than 8.2 kilometres in distance as well as a 1 cent increase to all concession fares.<sup>11</sup>

### 1.3 Transport for New South Wales, Australia

Transport for New South Wales (TfNSW) is the transportation agency that services Sydney and surrounding areas. TfNSW has various public transit options, including trains, the metro, buses, light rail, and ferries. Examples of TfNSW's fare structure and programs have been outlined in the following.<sup>12</sup>

---

<sup>11</sup> [Public Transport Council: Fare Review Exercise 2022.](#)

<sup>12</sup> [Transport for New South Wales: Fares and payments.](#)



### 1.3.1 Fare structure

TfNSW uses a hybrid approach of distance-based and time-based fares. The price a user pays will depend on the mode of transit they are using, the distance they are travelling, and the time of day they are travelling. For example, Table 46 below shows the fare someone with an adult fare card, called an Opal card, would pay at different times of the day and travelling different distances. The fare is determined by the user tapping onto the bus at the beginning of their trip and tapping when they get off the bus. If a user does not tap off, they will be charged the maximum fare.

**Table 46. Adult bus fares using an Opal fare card.**

Distance	On-peak hours	Off-peak hours
0-3 km	\$3.20	\$2.24
3-8 km	\$3.79	\$2.65
8+ km	\$4.87	\$3.40

### 1.3.2 Fare pricing

TfNSW increases Opal card fares annually and generally aligns fare increases with per cent increase recommendations by the Independent Pricing and Regulatory Tribunal. In 2022, the fares were increased by an average of 3 per cent.<sup>13</sup>

#### **Concession fares**

TfNSW has standard pricing for adult fares and determines the concession fare pricing based on the fare category of the customer. Concession fares are available for eligible customers.

Those categorized under concession fares as per TfNSW's policies include:

- Children and youth
  - Children aged 3 years and under travel free.
  - Children aged 4 to 15 years are entitled to concession fares.
  - Fulltime students aged 16 years and older may pay concession fares if they are holding a Transport Concession Entitlement card. This card is issued for free to students that have shown proof of fulltime enrollment.
- School students
  - Some students are eligible for free or subsidized travel to and from school, depending on where they live.

---

<sup>13</sup> [Transport for New South Wales: Annual Opal price changes on 4 July 2022.](#)

- Post-secondary students may also apply for a Transport Concession Entitlement card. This card is issued for free to students that have shown proof of fulltime enrollment and allows the student to pay concession fares.
- Seniors
  - Customers with a Seniors Card issued by any Australian state or territory are entitled to concession fares.
  - To be eligible for a NSW Seniors Card, the applicant must be a permanent resident of NSW aged 60 or over and doing no more than an average of 20 hours of paid work a week, across a 12-month period.
- Pensioners
  - Customers with a Pensioner Concession Card issued by any Australian state or territory are entitled to concession fares. Those eligible for this card will automatically receive one from the Department of Human Service or Department of Veterans' Affairs.
- Centrelink customers
  - Customers who are receiving income support from Centrelink are eligible for a Transport Concession Entitlement card. This card is issued for free to those that have met the eligibility requirements and allows the user to pay concession fares.
- Asylum seekers
  - Customers who are permanently residing in NSW and are receiving aid from an asylum seeker support agency are eligible for a Transport Concession Entitlement card. This card is issued for free to those that have met the eligibility requirements and allows the user to pay concession fares.
- Apprentices or trainees
  - Customers who are registered with Training Services NSW and in an active apprenticeship are eligible for a Transport Concession Entitlement card. This card is issued for free to those that have met the eligibility requirements and allows the user to pay concession fares.
- People with disabilities
  - Customers that have severe vision impairment can apply for a Vision Impaired Person's Pass that allows free travel on the transit system.
  - Customers who require an attendant's support to travel can apply for a Companion Card to allow their support person to travel for free with them.

- Veterans
  - Some veterans with a disability, widows and widowers, and dependent children who lost a parent are entitled to concession or free travel.
  - Eligible customers must apply for a Transport Concession Entitlement card or Free Pass.

### 1.3.3 Fare programs

In addition to the hybrid fare structure approach that TfNSW employs, they have a fare capping loyalty program that offers daily, weekly, and weekend fare caps. The fare caps are automatically applied when a customer uses an Opal fare card, and the caps are set at different prices for different concession fare groups

**Table 47. Fare capping daily, weekend, and weekly maximums by fare category.**

Fare Category	Weekday Cap	Weekend/Holidays Cap	Weekly Cap
Adult (18+)	\$16.30	\$8.15	\$50
Child (4-17, full time school)	\$8.10	\$4.05	\$25
Senior/Pensioner	\$2.50	\$2.50	\$17.50

## 1.4 Kansas City Area Transportation Authority, Kansas City, Missouri and Kansas, USA

The Kansas City Area Transportation Authority (KCATA) is a bi-state public transit agency that operates in metropolitan Kansas City, servicing residents located in the Missouri and Kansas parts of Kansas City.<sup>14</sup> Of particular interest is the fare free system that KCATA operates, which is discussed below.

### 1.4.1 Fare structure

KCATA operates using a unique fare structure as all passengers ride the transit system fare free.

An ordinance was unanimously passed by Council to explore fare free transit options. KCATA began implementing the fare free system slowly by first eliminating fares for veterans, then high school students, then clients of social services, prior to eliminating fares for everyone.

<sup>14</sup> [Kansas City Area Transportation Authority.](#)

The cost to eliminate fares for everyone is about \$8 million per year. The City's budget allots \$4.8 million for the initiative and the remaining costs are covered by private sector partners and private donations.

As most of KCATA's budget is covered by a new tax measure that generates \$16 to \$20 million annually in new revenue, the loss of fares only erased approximately 8 per cent of the agency's revenue. Even so, non-essential management activities needed to be cancelled to keep the program operational.<sup>15</sup>

To help ensure that the system can remain fare free, KCATA has set up a website, [zerofarekc.com](http://zerofarekc.com), that allows individuals and corporations to donate money towards the initiative.

## **1.5 Edmonton Transit Service, Edmonton, Alberta, Canada**

Edmonton Transit Service (ETS) operates light rail and bus public transit in the City of Edmonton. In 2017, Edmonton's Transit Strategy was completed, which guides the direction of the transit system, including the fare system.<sup>16</sup> Examples from the Transit Strategy and ETS website have been gathered and outlined below.

### **1.5.1 Fare structure**

Much like Guelph Transit, the ETS uses a flat fee fare structure, meaning no matter where a customer is travelling, they will always pay the same fare for one trip. Additionally, the fare system is age-based, meaning discounts are offered based on age.

### **1.5.2 Fare pricing**

Edmonton Council previously approved a user fee schedule that would see ETS cash fares increase by \$0.25 and tickets and monthly passes increase by 2 per cent annually from 2019 to 2022. However, Council decided against fare increases in 2021 and 2022 due to COVID-19 and wanting to wait until the new Arc Card smart fare system was operational.<sup>17</sup>

### ***Fare categories***

ETS has four main fare categories, which are as follows:

- "Children" – anyone aged 12 years old and under.
- "Youth" – anyone aged 13 to 24 years old.
- "Adult" – anyone aged 25 to 64 years old.

---

<sup>15</sup> [Smart Cities Dive: Who will pay for Kansas City, MO's free transit?](#)

<sup>16</sup> [Edmonton's Transit Strategy.](#)

<sup>17</sup> [Global News: Council delays cash fare increase for Edmonton transit users.](#)

- “Senior” – anyone aged 65 years and older.

### ***Transfers***

The payment of a proper fare allows users to obtain a transfer that will be valid for 90 minutes.

## **1.5.3 Fare programs**

### ***Fare Capping***

Currently, ETS offers daily and monthly fare capping for those paying adult fares and using the new Arc fare card. The daily cap is equivalent in value to a day pass and the monthly cap is equivalent in value to the monthly pass.

**Table 48. Adult fare types and prices.**

<b>Fare type</b>	<b>Fare price</b>
Cash	\$3.50
E-ticket	\$2.75
Daily fare cap maximum	\$10.25
Day Pass	\$10.25
Monthly fare cap maximum	\$100
Monthly pass	\$100

Fare capping will be available for the remaining fare categories by the end of 2023 when the Arc fare card is made available to all fare categories.

### ***Children 12 and Under Ride Free program***

Children under 12 ride free when accompanied by a fare-paying customer (youth, adult, senior). There is no limit to the number of children that can ride free with a fare-paying customer. For example, a teacher could bring an entire class; however, it is expected that the customer will be able to supervise all accompanied children properly.

### ***Seniors' Annual Pass***

Annual passes are available to seniors when an application is submitted that provides proof of age. They are valid from April 1 to March 31 of the following year.

The cost of the annual pass is determined by income as low-income seniors are eligible for a free or discounted pass.

**Table 49. Cost and eligibility requirements for the Seniors' Annual Pass.**

<b>Annual pass type</b>	<b>Income level</b>	<b>Cost to purchase</b>
Regular	Above \$30,265	\$385

<b>Annual pass type</b>	<b>Income level</b>	<b>Cost to purchase</b>
Low income	Between \$27,514 and \$30,265	\$139
Low income	Below \$27,514	\$0

### ***ETS@Work program***

In partnership with Edmonton employers, the ETS@Work program provides employees with a monthly discount of up to 24 per cent off the cost of a regular adult monthly pass, plus further eligibility for a federal tax credit.

The employer must agree to purchase a minimum of 10 passes a month. The employer is required to match the ETS discount of 12 per cent off the regular adult monthly pass fare, thus, providing their employees with a total discount of about 24 per cent. Employers are welcome to increase their portion of the discount at their own discretion. Employers are responsible for contracting with participating employees and administering the payroll deductions.

### ***CNIB Riders***

Customers who are visually impaired and who possess a CNIB ID card can use that card as a transit pass on all ETS services including routes providing service outside the City of Edmonton. The CNIB card must be shown to the bus operator upon boarding.

## **1.6 GO Transit, Ontario, Canada**

GO Transit is operated by the provincial transportation authority, Metrolinx, and is the regional public transit service for the Greater Toronto and Hamilton Area of Ontario.

### **1.6.1 Fare structure**

GO Transit uses a distance-based and age-based fare structure in which a user will pay a fare based on their age and how far they have travelled. To properly charge fares, users must purchase a ticket in advance, or they must tap their PRESTO fare card when boarding and alighting.

### **1.6.2 Fare programs**

#### ***GO Loyalty Discount Program***

Metrolinx owns and operates PRESTO, a contactless smart card automated fare collection system, which is used on GO Transit and other municipal Ontarian transit agencies. PRESTO allows for the implementation of fare capping by daily, weekly, or monthly values.

On GO Transit, monthly fare capping is employed for users with a PRESTO card where after paying for 40 trips within a calendar month, users will ride

free for the rest of that month. For trips 1 to 35, different discounts are applied for different fare categories, as outlined in Table 50.<sup>18</sup>

**Table 50. Percent discount applied to the single ride adult ticket fare for each fare category and trip number within a month.**

<b>Number of trips</b>	<b>Youth</b>	<b>Adult</b>	<b>Senior</b>
1 through 35	40%	15.7%	55%
36 through 40	95%	88.3%	55%
41 and more	100%	100%	100%

Similarly, Brampton Transit employs PRESTO and introduced weekly fare capping in July 2020. If a customer uses their PRESTO card to pay for 12 trips within a one-week period (Monday to Sunday), then every additional trip within that week will be free.<sup>19</sup>

### **1.6.3 Fare payment options**

GO Transit recently introduced the ability for a user to tap on and off with a credit card, including digital credit cards on smartphones and watches. Users who tap a credit card will also be able to participate in the GO Loyalty Discount Program and receive the same discounts that those using a PRESTO card would get. However, users must continuously tap using the same method (i.e., physical card or digital card) as the trips purchased using each method are captured separately.<sup>20</sup>

## **1.7 Payment option best practices**

From the Transit Leadership Summit white paper<sup>21</sup> on fare collection and policy, providing a wide range of fare payment options is not only beneficial to the customer experience but is in the best interest of transit agencies wanting to grow ridership.

More advanced fare technology, such as contactless smart cards and mobile NFC payments, makes it easier to manage demand and address equity concerns through differentiated fares. These types of payment options can contribute to increased ridership, and, thus, increased revenue, due to the convenience provided. Having the option for pre-payment and auto-loading of smart cards means passenger boarding will be quicker and the bus dwells for shorter periods of time, resulting in faster bus routes.

---

<sup>18</sup> [GO Transit: Fare Discounts with PRESTO.](#)

<sup>19</sup> [Brampton Transit: Bus Fares.](#)

<sup>20</sup> [GO Transit: Tap On and Off With a Credit Card on GO.](#)

<sup>21</sup> [Transit Leadership Summit: Fare Collection and Fare Policy.](#)

The attitude of existing and potential customers towards transit is largely shaped by the features offered, such as convenient payment options, which can change overall perception and mode choice.

### **1.7.1 Interac payment system**

Adding the option to pay fares by tapping a debit card or smart phone are excellent options for improving convenience for customers. These payment options have been successfully implemented in many transit agencies around the world, such as in London, England.

Transport for London (TfL) implemented fare payment by contactless card in 2012. As many customers were used to tapping their bank cards to make payments there was great uptake. By 2019, one in eight trips on TfL was being paid for with a mobile wallet app. TfL has also implemented daily fare capping for customers using a contactless card so that they will never pay more than that of a day pass.

Since approximately 94 per cent of Canadians have an Interac debit card and over half of day-to-day purchases in Canada are already made by tap, it is believed there is great potential for implementing contactless card payment on public transit.<sup>22</sup>

### **1.7.2 Maintaining cash fares**

While moving to automated payment systems may be more convenient for many customers, the complete elimination of the option to pay cash fares is inequitable to those who may not have another payment option.

It is estimated that ten per cent of American adults do not have a bank account or credit card and do not have a smart phone. Additionally, not everyone can use, or feels comfortable using, a mobile app or smart card with automatic reloading features. Having the ability to pay cash is also a convenient option for infrequent riders who do not have a smart fare card or mobile app.

The Portland State University Transportation Research and Education Center conducted research on the consequences associated with removing cash fare payments. Their conclusions found that, generally, low-income individuals had less access to smartphones, the internet, and banking, meaning these individuals also tended to have lower access to automated fare systems. As such, while society is moving away from cash, eliminating this option entirely is not recommended.<sup>23</sup>

---

<sup>22</sup> [Interac: Open-loop payment systems for transit.](#)

<sup>23</sup> [Portland State University: Eliminating cash options for public transit fares.](#)



## 2. Evaluation of viability

Information collected on practices and programs of Guelph's municipal comparators and other case studies from around the world were examined for the applicability to the context of Guelph and for financial feasibility. Ratings and reasoning have been outlined in the tables below.

**Table 51. Fare program contextual applicability and financial feasibility.**

<b>Fare program</b>	<b>Contextually applicable?</b>	<b>Financially feasible?</b>	<b>Reasoning</b>
Kids aged 12 and under ride free	Yes	Yes	<ul style="list-style-type: none"> <li>• Existing pilot successful</li> <li>• Limited revenue impact</li> <li>• Encourages lifelong riders</li> </ul>
Seniors ride free programs (midday; one day a week)	Yes	Unlikely	<ul style="list-style-type: none"> <li>• Desire from community engagement</li> <li>• Likely significant revenue loss</li> <li>• Would need to further explore options to determine viability</li> </ul>
Seniors annual pass	Yes	Unlikely	<ul style="list-style-type: none"> <li>• Was requested in community engagement</li> <li>• Revenue loss expected</li> <li>• Further research is required to determine viability</li> </ul>
CNIB cardholders ride free	Yes	Yes	<ul style="list-style-type: none"> <li>• Existing program</li> <li>• Limited revenue impact</li> </ul>
Concession fares for persons with disabilities and/or low-income	Yes	Unlikely	<ul style="list-style-type: none"> <li>• Likely higher revenue loss</li> <li>• Affordable Bus Pass program covers many of these users</li> </ul>

<b>Fare program</b>	<b>Contextually applicable?</b>	<b>Financially feasible?</b>	<b>Reasoning</b>
Daily, weekly, and/or monthly fare capping	Yes	Likely	<ul style="list-style-type: none"> <li>• Fare equity</li> <li>• Simplify fare media options</li> </ul>
Employer pass program	Yes	Likely	<ul style="list-style-type: none"> <li>• Existing program could be expanded</li> <li>• Reward frequent riders</li> <li>• Build relationships with local businesses</li> </ul>

**Table 52. Fare structure contextual applicability and financial feasibility.**

<b>Fare structure</b>	<b>Contextually applicable?</b>	<b>Financially feasible?</b>	<b>Reasoning</b>
Flat fare	Yes	Yes	<ul style="list-style-type: none"> <li>• Existing fare structure</li> <li>• Best for small and medium-sized transit agencies</li> <li>• Keeps system simple</li> </ul>
Distance-based fares	No	Unlikely	<ul style="list-style-type: none"> <li>• Best for large transit agencies</li> <li>• Distance travelled would not be far enough for this system to work well</li> <li>• Would complicate the system</li> </ul>
Zone-based fares	No	Unlikely	<ul style="list-style-type: none"> <li>• Best for large transit agencies</li> <li>• No clear zones in Guelph</li> <li>• Would complicate the system</li> </ul>

<b>Fare structure</b>	<b>Contextually applicable?</b>	<b>Financially feasible?</b>	<b>Reasoning</b>
Time-based fares	Possibly	Unlikely	<ul style="list-style-type: none"> <li>• Best for large transit agencies</li> <li>• Offers discounted fares during off-peak periods – would encourage ridership</li> <li>• Would complicate the system</li> </ul>
Fare free	Possibly	Highly unlikely	<ul style="list-style-type: none"> <li>• Would result in significant revenue loss</li> <li>• Best suited for transit agencies that are heavily subsidized by private sector</li> </ul>
Age-based fares	Yes	Yes	<ul style="list-style-type: none"> <li>• Existing fare system</li> <li>• Favoured in community engagement</li> </ul>
Income-based fares	Yes	Highly likely	<ul style="list-style-type: none"> <li>• Many agencies moving towards this for fare equity</li> <li>• Guelph has unique Affordable Bus Pass program already that supports this</li> <li>• Not favoured by community engagement</li> </ul>

**Table 53. Fare pricing methodology contextual applicability and financial feasibility.**

<b>Pricing methodology</b>	<b>Contextually applicable?</b>	<b>Financially feasible?</b>	<b>Reasoning</b>
Regular interval increases	Yes	Yes	<ul style="list-style-type: none"> <li>• Provides consistency for customers in timing and pricing</li> <li>• Ensures growing costs are covered</li> </ul>

<b>Pricing methodology</b>	<b>Contextually applicable?</b>	<b>Financially feasible?</b>	<b>Reasoning</b>
Inflationary increases	Yes	Yes	<ul style="list-style-type: none"> <li>• Likely consistent increases, although not always</li> <li>• Ensures growing costs are covered</li> </ul>
Fare regulation formula	No	Possibly	<ul style="list-style-type: none"> <li>• Better suited for large transit agencies</li> <li>• Difficult to obtain necessary data to successfully conduct</li> </ul>

**Table 54. Fare payment options contextual applicability and financial feasibility.**

<b>Payment options</b>	<b>Contextually applicable?</b>	<b>Financially feasible?</b>	<b>Reasoning</b>
Debit/credit cards	Yes	Likely	<ul style="list-style-type: none"> <li>• Popular form of payment</li> <li>• Would encourage infrequent riders to ride more often</li> </ul>
Eliminate cash fare	No	Likely	<ul style="list-style-type: none"> <li>• Cash is still an important option for visitors and those that take transit</li> <li>• Would eliminate labour hours needed to count cash</li> <li>• Just replaced fareboxes</li> </ul>
Ticket vending machine	Possibly	Unlikely	<ul style="list-style-type: none"> <li>• Not a priority and not needed currently – low uptake expected</li> <li>• May be beneficial for tourism – printable day pass ticket</li> <li>• Very expensive machines</li> </ul>
Self-service reload kiosks	Yes	Likely	<ul style="list-style-type: none"> <li>• Added option for reloading fare cards</li> </ul>

Payment options	Contextually applicable?	Financially feasible?	Reasoning
			<ul style="list-style-type: none"> <li>• Popular option in community engagement</li> <li>• Possibly reduce staff resources needed for reloading</li> </ul>

## Appendix D: Public engagement results summary

### 1. Introduction

Guelph Transit began reviewing the existing fare system, including structure, policies, programs, payment options and pricing, as a follow-up to the GTFRAP. After initial research on options that could feasibly be made to Guelph Transit's fare system, the public engagement campaign was launched to guide the options for fare system changes that will be presented to Council.

### 2. Purpose and scope

The objective of the Fare Strategy community engagement campaign was to obtain feedback on the positives and negatives of the existing fare system, which fare programs will best meet residents' needs, how fare programs should be funded, and how fare changes should be made.

### 3. Method

The public engagement campaign ran from March 23 to April 10, 2022 and used [haveyoursay.guelph.ca](https://haveyoursay.guelph.ca) as the main source for providing the public with information and obtaining feedback. There were several in-person events that took place following COVID-19 protocols as well. The goal of these various methods was to reach a wide range of citizens to ensure community representation. The following describes each method that was used for gathering public feedback.

#### 3.1 Surveys

There were several surveys available for the public to complete. The main Fare Strategy survey was created to understand how citizens currently pay on Transit, how they would like to pay in the future, what fare programs they are interested in and/or supportive of, how fare programs should be

funded, and what the fare structure should look like. The main Fare Strategy survey was available for individuals to complete online at [haveyoursay.guelph.ca](https://haveyoursay.guelph.ca), on paper and on iPads at open house events, and on paper at select locations, including City Hall and recreation centres.

Two Corporate Pass program surveys were also available on [haveyoursay.guelph.ca](https://haveyoursay.guelph.ca). The Corporate Pass program: Employer survey created with the intention to gauge interest of local employers in providing a Corporate Pass program for their employees. While this survey was open to the public, communications were sent out via the City's 'Mind Your Business' newsletter requesting that employers complete the survey. The Corporate Pass program: Employee survey was created with the intention to gauge interest of employees at local businesses in the Corporate Pass program. While this survey was open to the public, communications were sent out via the City's 'Mind Your Business' newsletter requesting that employers ask their employees to complete the survey.

An online reload satisfaction survey was created to understand the satisfaction of those that regularly use the online fare card reload platform, [onyourwayreload.guelph.ca](https://onyourwayreload.guelph.ca). While this survey was open to the public, communications were sent out via email to customers that have a registered OnYourWay card with Guelph Transit.

An additional survey on youth semester and summer passes was open from June 1 to June 15, 2022. This survey was launched as a follow-up survey to gather more detailed information from the public on if discounted passes for high school students would be of interest and/or beneficial to our community. This was an idea that came up in initial engagement but had not been covered in the main Fare Strategy survey.

### **3.2 Open houses and intercepts**

Several open house events were held at various locations throughout the City from March 23 to April 10, 2022. These locations included the Evergreen Senior Centre, the West End Recreation Centre, City Hall, the Main Library branch, Ontario Works, and Willow West Mall. Those that attended had the opportunity to read infographic boards, talk with staff, complete the full-length survey, and/or participate in the intercept sticker boards activity.

Additionally, staff visited several locations with the sticker boards for quick intercept responses from people on the go. These locations included Guelph Central Station, Riverside Park, Stone Road Mall, and the Woodlawn Smart Centre bus stops.

### **3.3 Virtual workshops**

There were three virtual workshops that were held online via Webex Events and were broadcasted to Facebook as well. The workshops took place on Tuesday, March 29, 2022, at 1:30 p.m., Saturday, April 2, 2022, at 10:30 a.m., and Wednesday, April 6, 2022, at 6:30 p.m. All workshops were structured the same but were offered on different days and times to allow community members several opportunities to attend. The workshops began with a presentation on what the Fare Strategy entails and what feedback is needed. Then, an interactive portion of the workshop took place using the online platform, Mentimeter, where viewers could participate in providing feedback to pre-set questions live during the workshop. Additionally, attendees had the opportunity to ask questions and provide comments in Webex or on Facebook that staff answered live.

## **4. Results**

### **4.1 Respondents**

The public engagement campaign resulted in 777 total survey responses, including 675 Fare Strategy survey responses, 16 Corporate Pass program: Employer survey responses, 26 Corporate Pass program: Employee survey responses, and 60 online reload satisfaction survey responses. Additionally, there were approximately 350 in-person interactions at open house and intercept events as well as over 1,300 workshop video views, over 25 virtual workshop live viewers, and approximately 15 virtual workshop activity participants.

An additional 125 responses were received from the high school student discount pass survey that was launched as a follow-up survey to gather more information on this topic.

### **4.2 Survey responses**

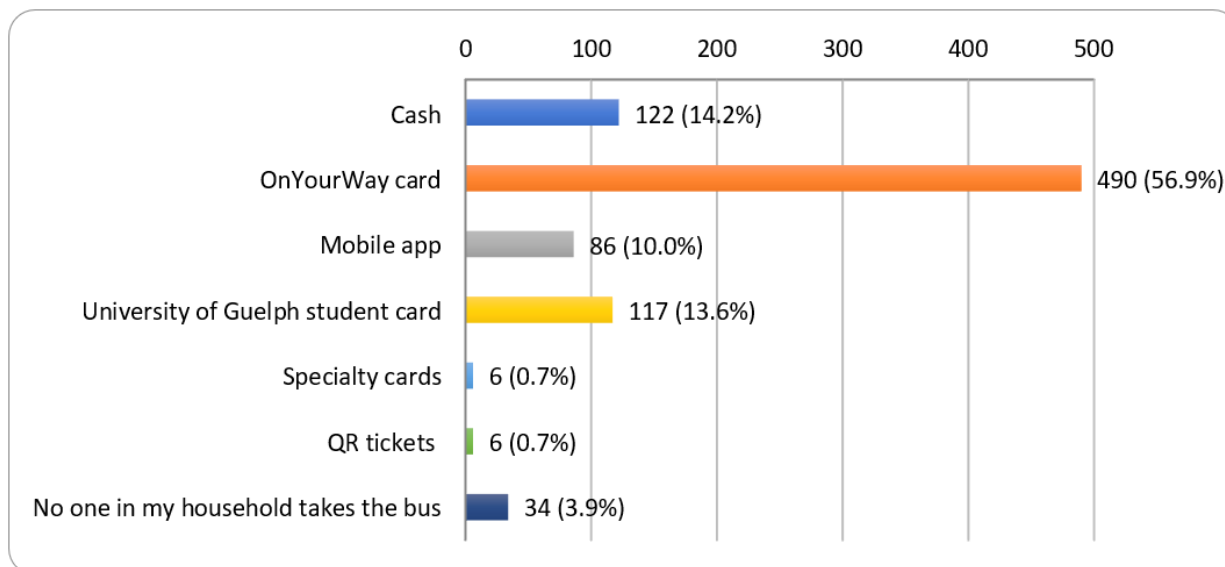
#### **Fare Strategy survey**

There were 675 responses to this survey that were either completed online, on paper via the survey collection drop boxes, or in person at an engagement event on paper or online.

#### ***Question 1***

Of those that responded to the Fare Strategy survey, 56.9% said they or their family members currently use an OnYourWay card to pay when getting on the bus. Additionally, 14.2% said they use cash, 13.6% said University of Guelph student card, 10.0% said mobile app, 0.7% said specialty cards (ex. Welcome to Guelph, PAL, CNIB, Veterans), and 0.7% said QR tickets

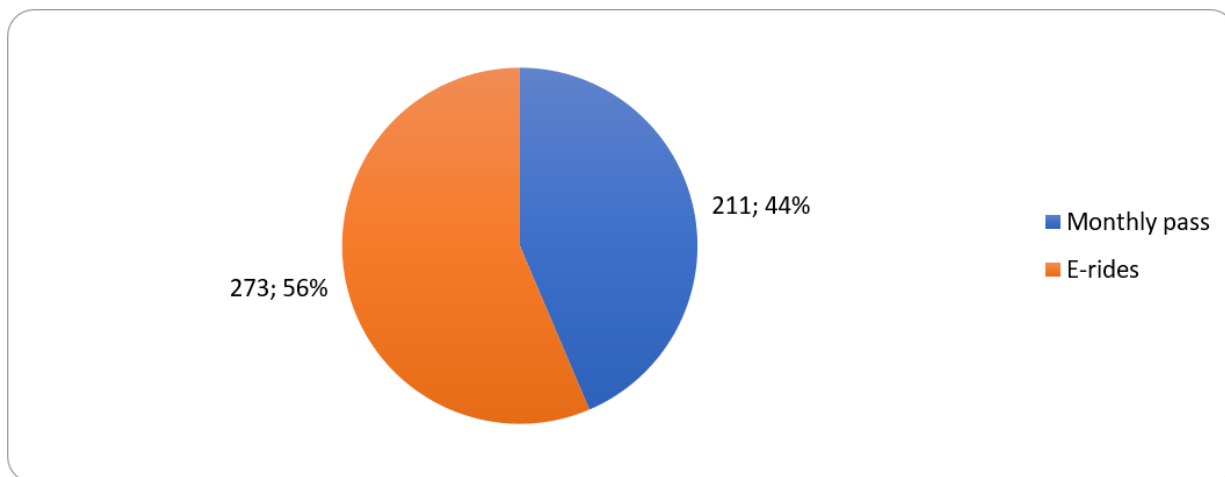
(specialized program). The remaining 3.9% said that no one in their household rides the bus. Respondents could select more than one option.



**Figure 4. How do you or members of your household currently pay when getting on the bus?**

#### **Question 1.1**

The respondents that said they pay with an OnYourWay card were asked what they load their card with. 56.4% said e-rides while the other 43.6% said a monthly pass.



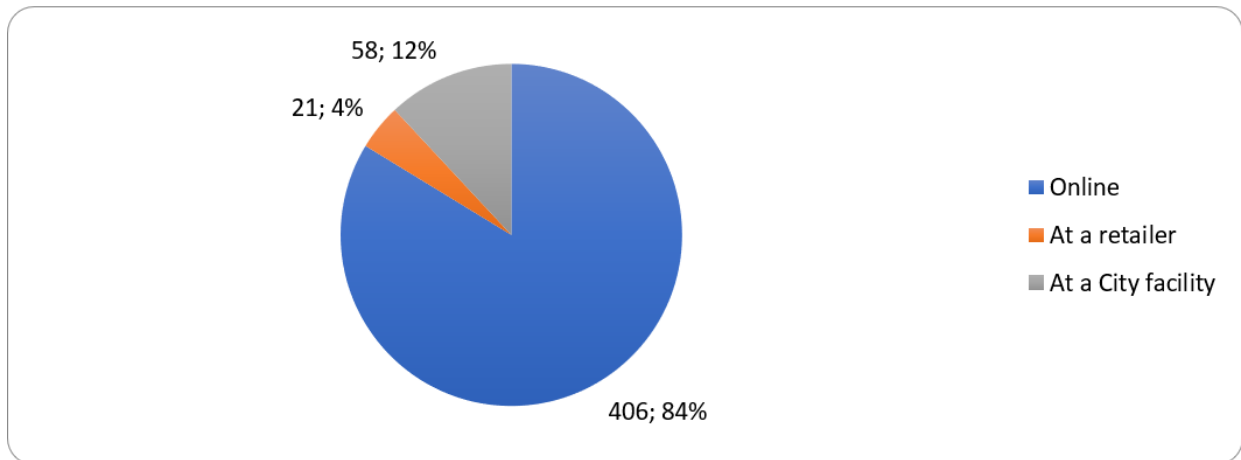
**Figure 5. What kind of OnYourWay card do you have?**

#### **Question 1.2**

These respondents were further asked, "How do you usually load your OnYourWay card?" 83.7% said they load online at



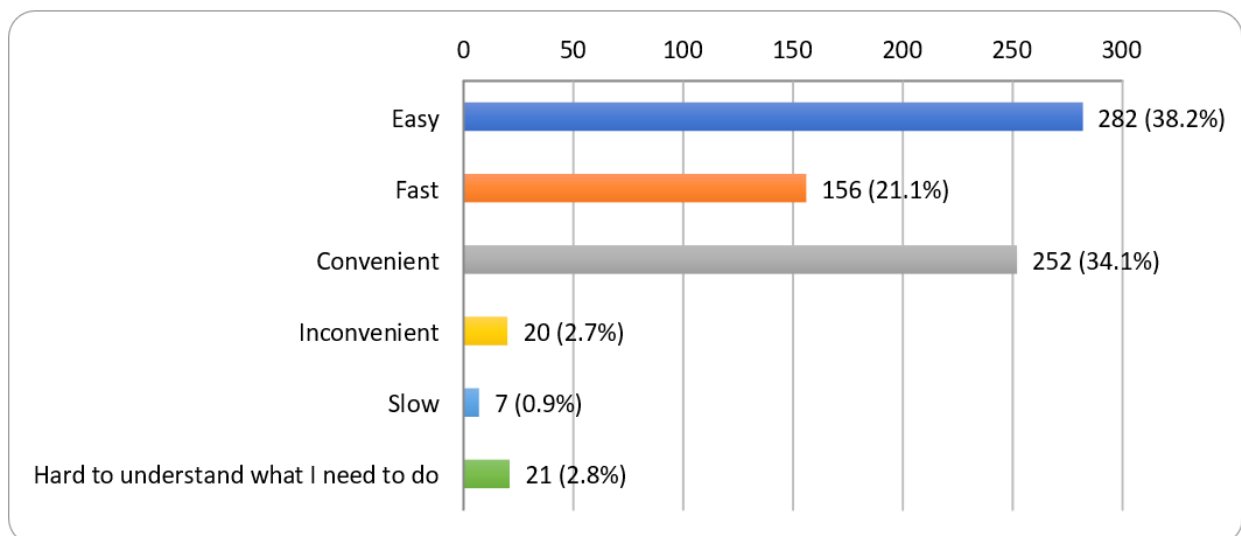
onyourwayreload.guelph.ca, 12.0% said they load at a City facility (ex. City Hall, museum, libraries, recreation centres, Guelph Central Station), and the remaining 4.3% said they load at a retailer (stores located around the city).



**Figure 6. How do you usually load your OnYourWay card?**

**Question 1.2.1**

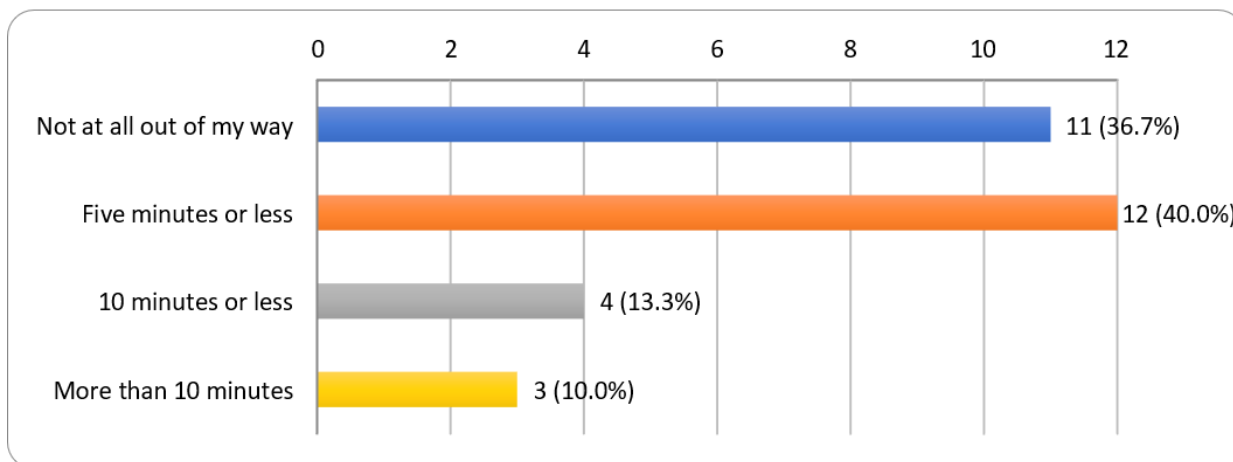
The respondents that said they load online were asked, “How is your experience loading your card online?” with the option to select more than one response. Most responses were positive, with 70.4% saying it is easy, 62.7% saying it is convenient, and 38.8% saying it is fast. Of the negative responses received, 5.2% said it is hard to understand what I need to do, 5.0% said it is inconvenient, and 1.7% said it is slow.



**Figure 7. How is your experience loading your card online?**

### Question 1.2.2

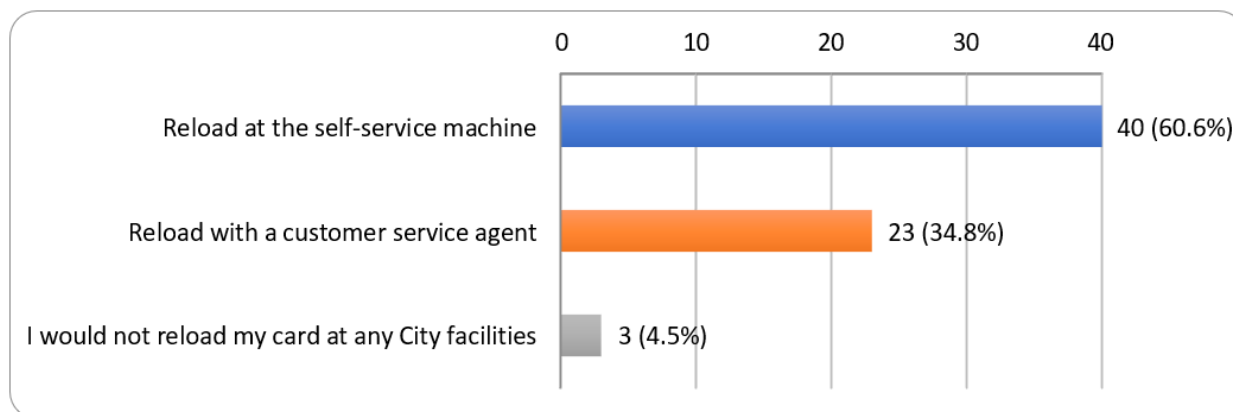
The respondents that said they load in person at a retailer were asked how far they must travel to reload their card. 36.7% said they do not have travel at all out of their way to reload their card and 40.0% said they only have to travel five minutes or less. An additional 13.3% said they must travel 10 minutes or less and 10% said they must travel more than 10 minutes.



**Figure 8. How far do you have to travel out of your way to reload your card?**

### Question 1.2.3

The respondents that said they load in person at a retailer or City facility were asked if they would be willing to use a self-service machine if it were available at City facilities. 60.6% said they would choose to reload at the self-service machine while 34.8% said they would still choose to reload with a customer service agent. The remaining 4.5% said they would rather not reload at a City facility.

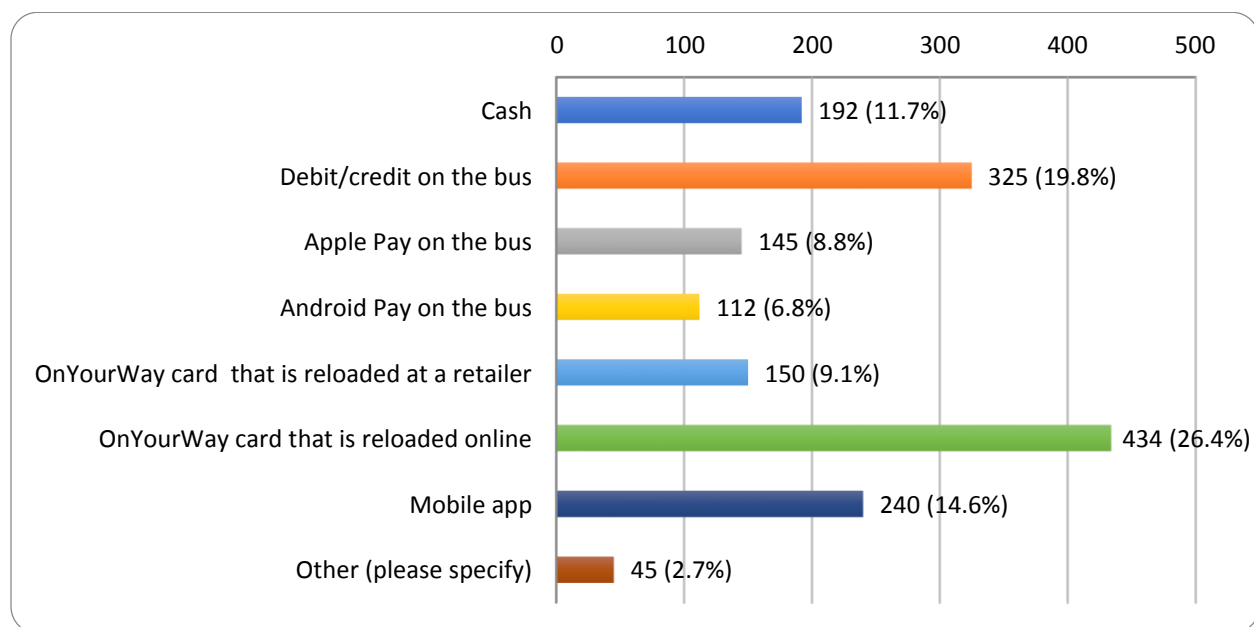


**Figure 9. If a self-service OnYourWay card reload machine were available at City facilities, how would you choose to reload?**

## Question 2

All respondents of the survey were asked about what payment methods they would like to use when riding the bus in the future. Respondents were able to select more than one option. Paying with an OnYourWay card remained the most popular choice at 35.5%, with 26.4% choosing an OnYourWay card that is reloaded online and 9.1% choosing an OnYourWay card that is reloaded at a retailer. 35.4% of respondents chose using a debit/credit card, which is currently not an option, with 19.8% choosing to use a physical debit or credit card, 8.8% choosing Apple Pay, and 6.8% choosing Android Pay as their preferred method. An additional 14.6% selected the mobile app and 11.7% selected cash. The remaining 2.7% chose 'other' and were asked to specify.

Of those that responded 'other,' more than half said they would like to pay using a PRESTO card. Additional responses included using physical bus tickets, University of Guelph student cards, and day passes.

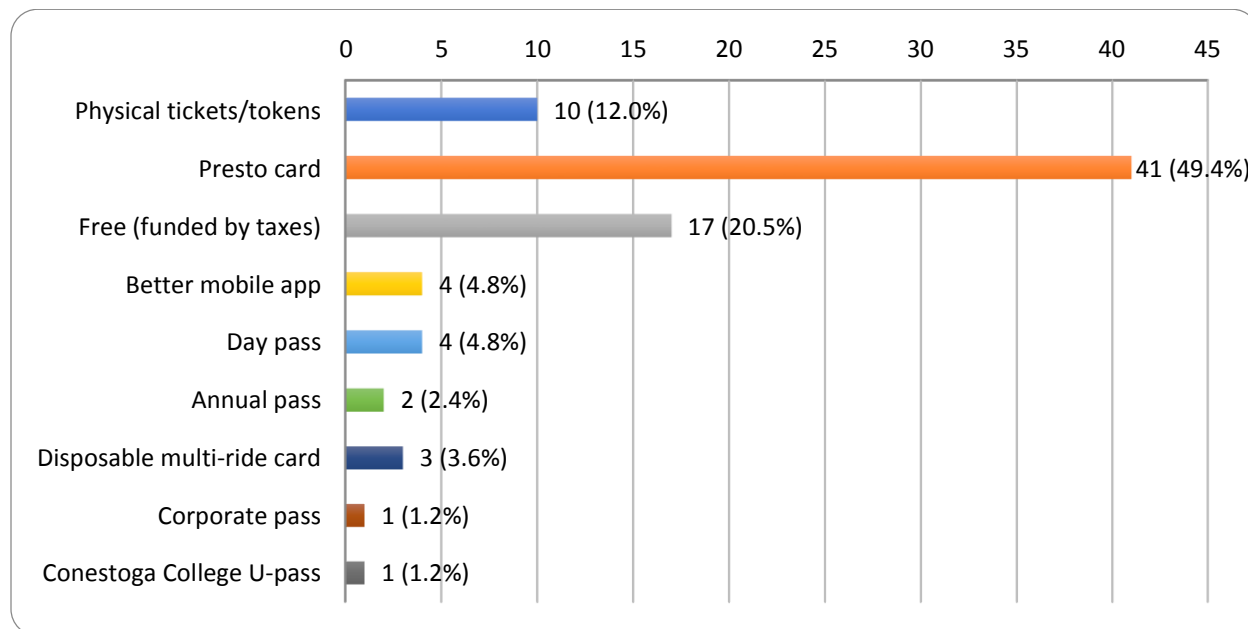


**Figure 10. When paying on the bus, how would you like to pay?**

## Question 3

All respondents were asked if they had ideas for other payment methods not mentioned in the previous question. Of the 83 respondents (12.4% of all respondents) to this question that suggested a different method of payment, 49.4% said implementing PRESTO cards, 20.5% said providing free transit by increasing taxes, and 12.0% said returning to physical tickets and tokens. An additional 4.8% said paying with a better mobile app, 4.8% said

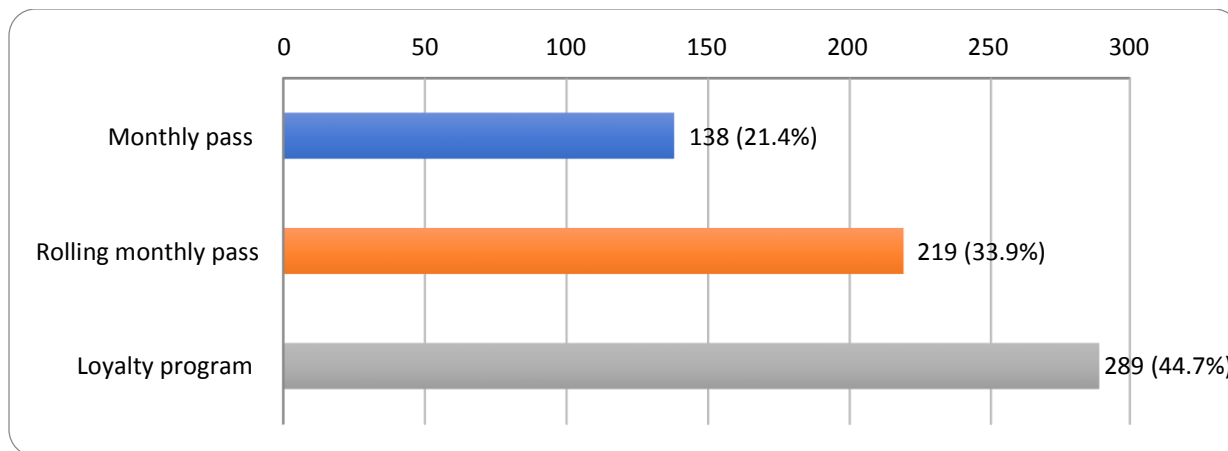
day passes, 3.6% said disposable multi-ride cards, 2.4% said annual passes, 1.2% said Corporates Passes, and 1.2% said Conestoga College U pass.



**Figure 11. Are there other ways of paying for transit we should explore?**

#### **Question 4**

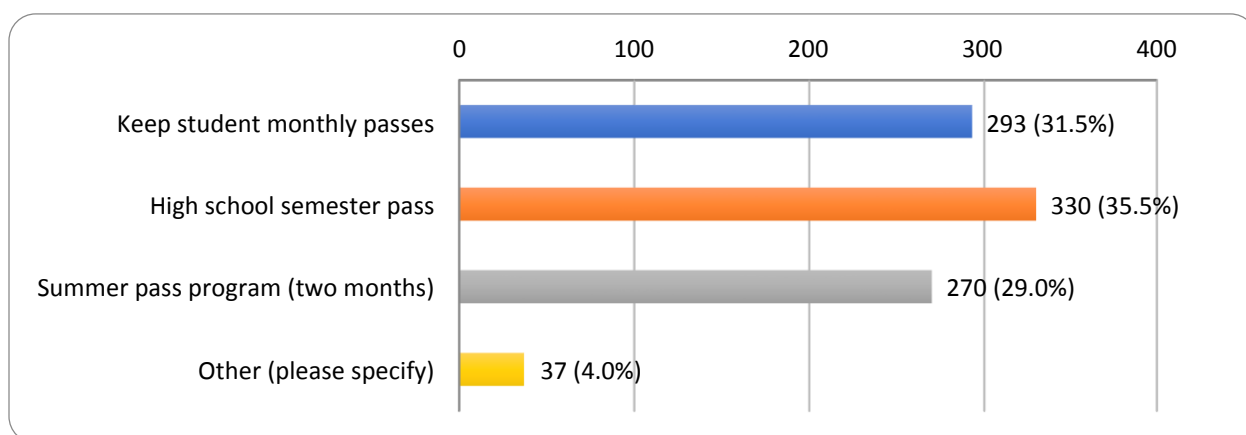
Respondents were then asked which option makes the most sense to them in terms of monthly pass options. 41.4% said a loyalty program, which would have the user pay their regular fare a certain number of times, then ride free for the rest of the calendar month. 33.9% said a rolling monthly pass in which the user would pay up-front, and the pass becomes effective on the date of purchase and expires one month from that date. 21.4% said a monthly pass, which is what is currently offered, the user pays up-front for the calendar month.



**Figure 12. Which monthly payment option makes the most sense to you?**

### **Question 5**

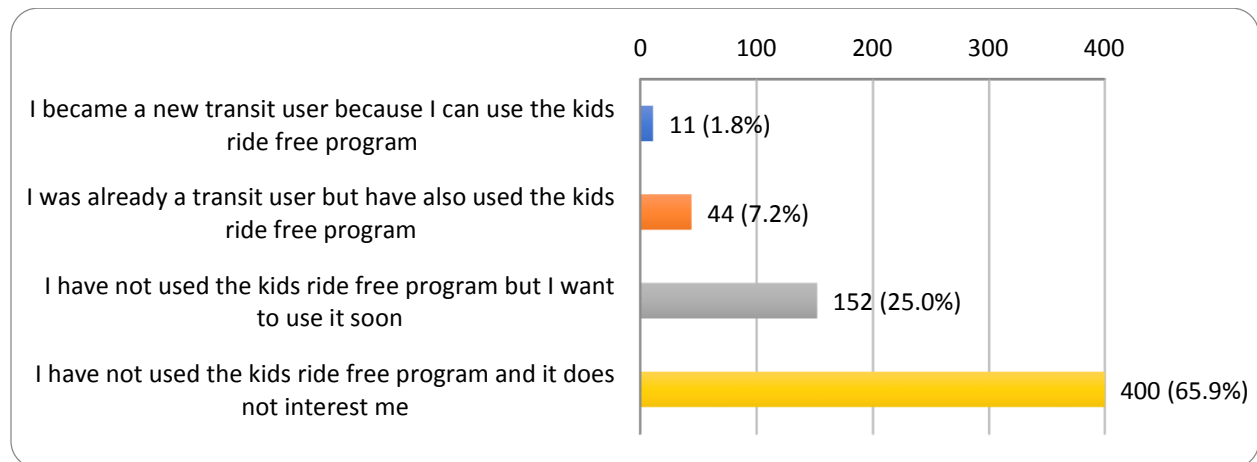
This question asked respondents what kind of bus pass options should be explored for Guelph high school students. Respondents could select more than one option. 35.5% said to explore high school semester passes, 31.5% said to keep monthly passes for high school students, and 29.0% said to explore a two-month summer pass program. The remaining 4.0% said 'other' in which responses consisted of suggestions for high school students to ride free all year round or in the summer only, for a high school annual pass to be made available, and for Transit to partner with school boards to provide students with discounted or free passes.



**Figure 13. Area high school students have an option for monthly passes now, but are there other options we should explore that are even better?**

### Question 6

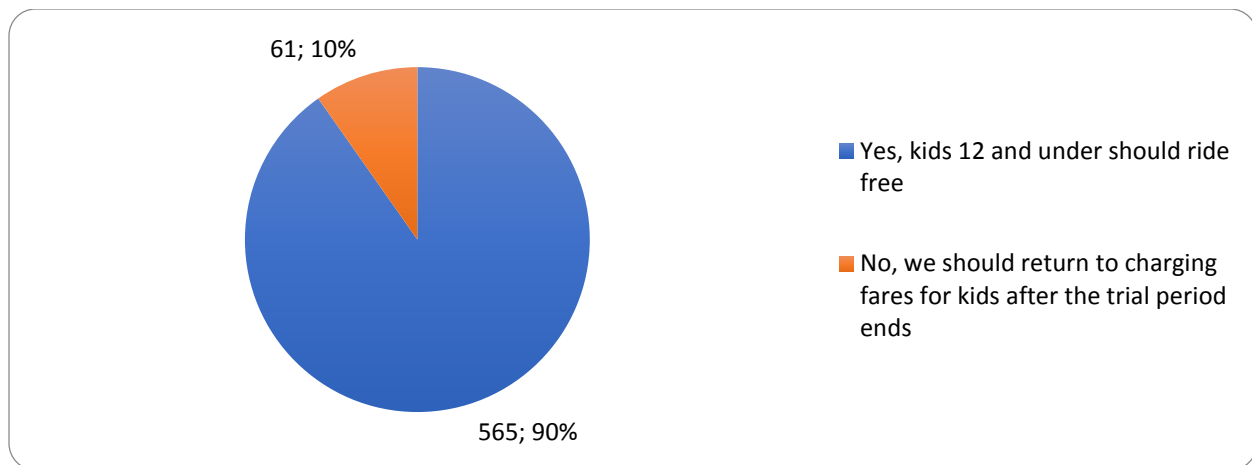
All respondents were then asked if they had used the newly launched Kids Ride Free program. 65.9% said they had not used it and were not interested in using it while 25.0% said they had not used it but wanted to. Another 7.2% said they were already a transit user but had also used the program, and the remaining 1.8% said they became a new transit user because they could use the Kids Ride Free program.



**Figure 14. Have you used the Kids Ride Free program for your family or those you care for?**

### Question 7

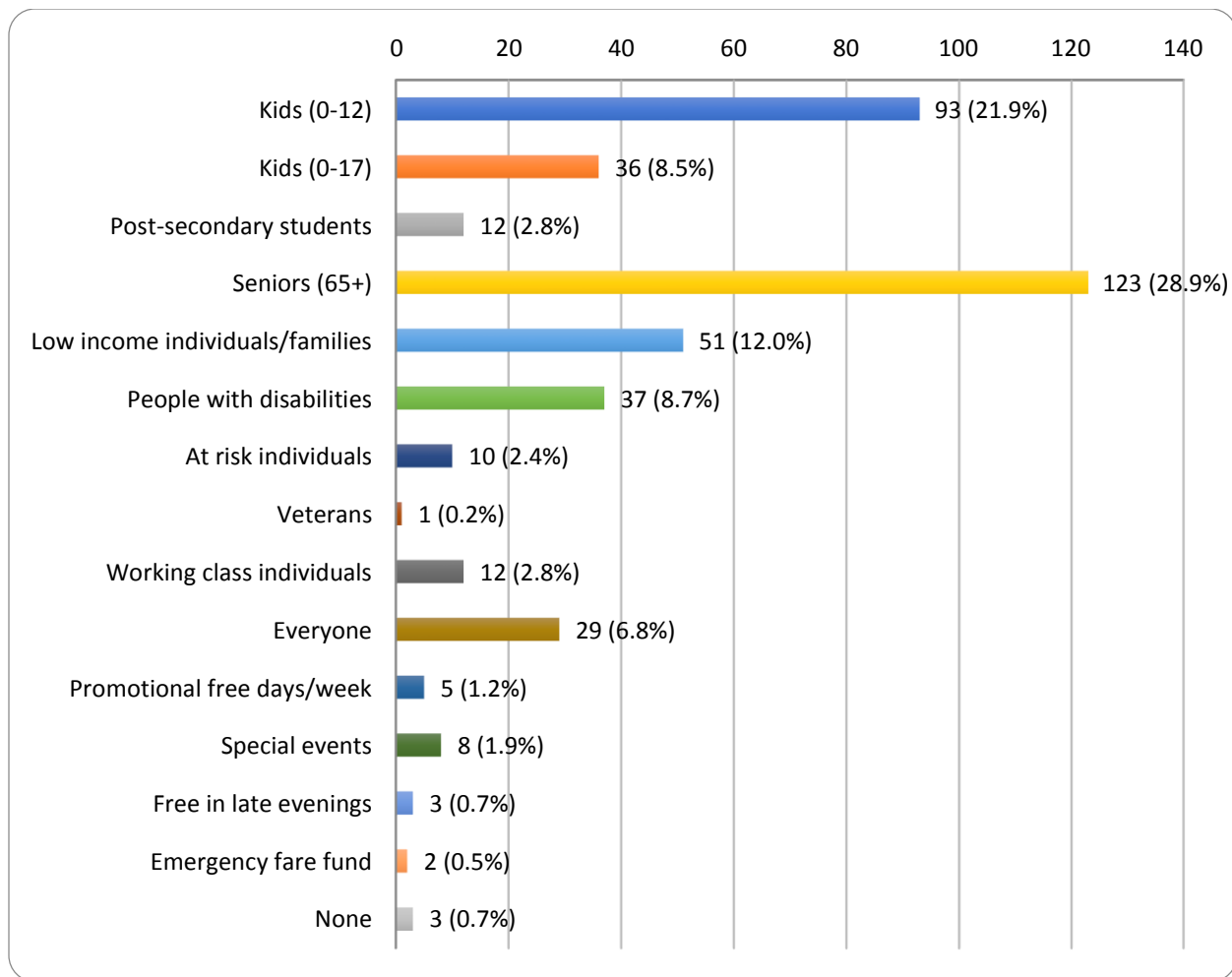
This question was followed up with asking respondents whether Kids Ride Free program, which is currently a one-year pilot program, should become permanent. 90.3% of respondents wanted to see the program become permanent while only 9.7% of respondents wanted to return to charging kids aged 5-12 years old regular fares at the end of trial period.



**Figure 15. Would you like to see the Kids Ride Free program continue permanently?**

### **Question 8**

All respondents were asked if they could choose a group to receive free fares, who would it be for? As this was an open-ended question, there were a range of responses, but the Kids Ride Free program was the most popular choice with 30.4%, split into 21.9% saying kids 12 and under should ride free and 8.5% saying kids under 18 should ride free. Seniors should ride free was also a popular choice with 28.9%. Additional responses included 12.0% saying low-income families/individuals, 8.7% saying people with disabilities, 6.8% saying everyone, 2.8% saying working class individuals, 2.4% saying at risk/homeless individuals, and 0.2% saying veterans. Other responses focused on providing free fares for everyone in certain situations, such as the 1.9% saying transit should be free for special events, 1.2% suggesting promotional free transit days or weeks, 0.7% saying transit should be free in the evenings, and 0.5% saying an emergency fare fund should be available for those who forgot to reload their fare card. Another 0.7% said there should not be any free fare programs.

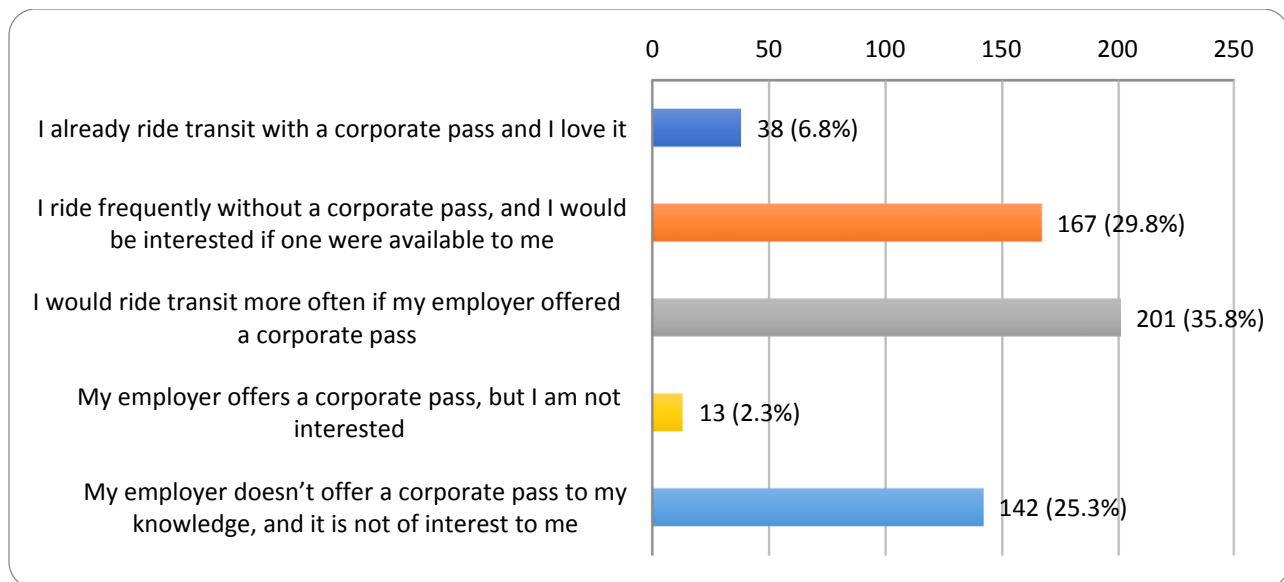


**Figure 16. If you could choose one ride free program that is right for Guelph, who would it be for?**

### **Question 9**

Respondents were then asked if a Corporate Pass program, where the City discounts a percentage of a monthly pass and an employer matches that per cent so they can offer their employees a discounted monthly pass, would be of interest to them. Of those that this question applied to, 35.8% said they would ride transit more often if their employer offered a Corporate Pass, 29.8% said they already ride transit frequently and would be interested in a Corporate Pass if it were available to them, and 6.8% said they already ride transit with a Corporate Pass and they love it. The remaining 25.3% said their employer does not offer a Corporate Pass and it is not of interest to them as well as 2.3% said their employer offers a Corporate Pass but they are not interested.

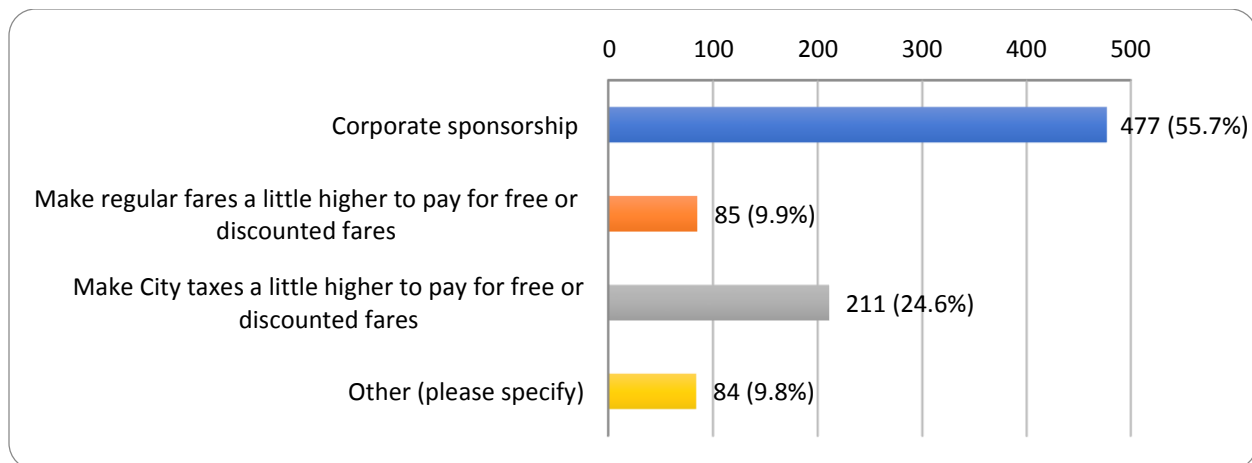




**Figure 17. Is a Corporate Pass program like this of interest to you?**

### **Question 10**

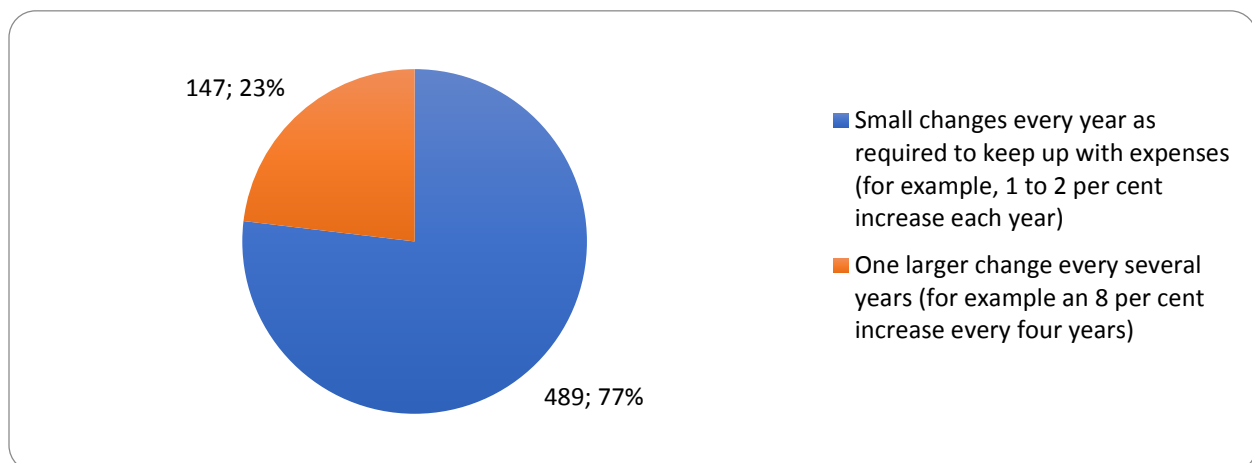
Respondents were reminded that providing free and discounted fare programs comes at a cost and were then asked what kind of funding should be explored to cover the costs of a program. More than one option could be selected for this question. 55.7% of respondents selected corporate sponsorships, where companies would partner with Transit to offer free or discounted fares. Another 24.6% chose making City taxes a little higher and 9.9% said making fares a little higher. The remaining 9.8% said 'other' and were asked to specify. These responses primarily included suggestions for taxing local large corporations, reallocating City budget funds to Transit, federal and provincial grants and sponsorships, increasing parking fees to fund Transit programs, and running fundraisers/having the option to donate fares.



**Figure 18. If a free or discounted fare program is offered, what kind of funding should we explore to cover costs?**

### Question 11

All respondents were told that Guelph Transit is reviewing customer fares to ride the bus. They were then asked, “If we were to make a change, how would you like to see that change happen?” More than three quarters (76.9%) of respondents said they would prefer small changes every year as required to keep up with expenses while 23.1% said they’d prefer one larger change every several years.

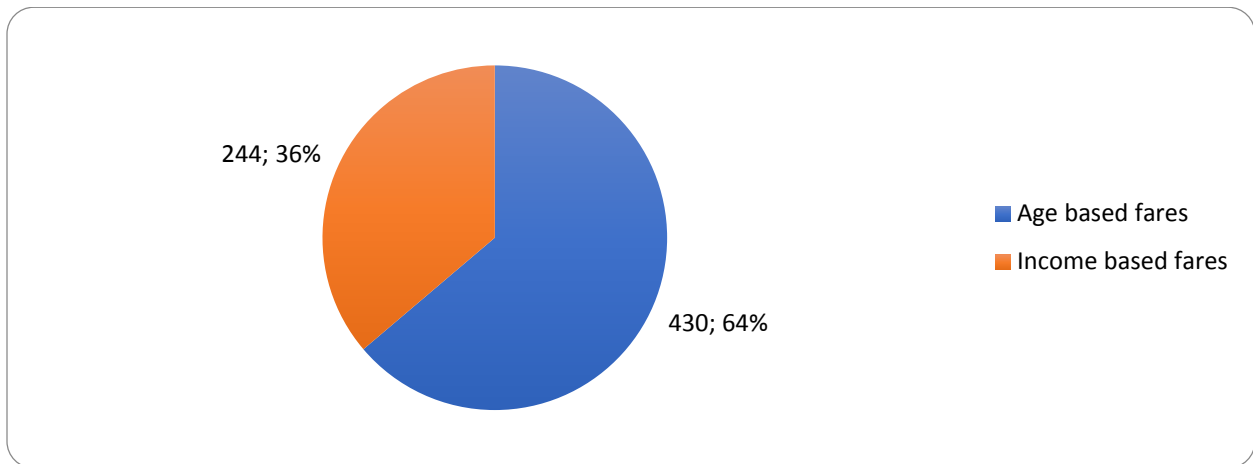


**Figure 19. If fares must be changed, how would you like to see that change happen?**

### Question 12

This question asked respondents about what fare structure they think is best suited for Guelph. Almost two thirds (63.8%) of respondents said they prefer an age-based fare system, which is the current system, and provides discounts based on the age of the user. The remaining 36.2% said they

prefer an income-based fare system, which provides discounts based on the income of the user.



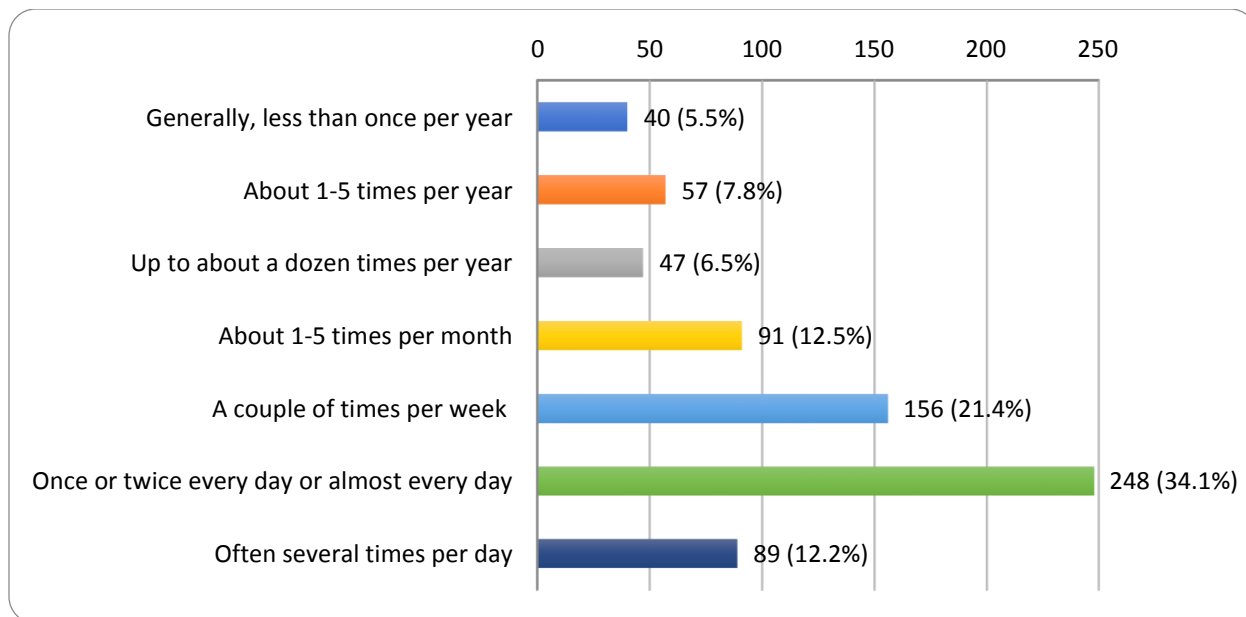
**Figure 20. Which fare structure is the right fit for Guelph?**

### ***Demographic Questions***

The following questions were asked to get an understanding of who completed the survey and if any groups were notably missing from responses.

### ***Question 13***

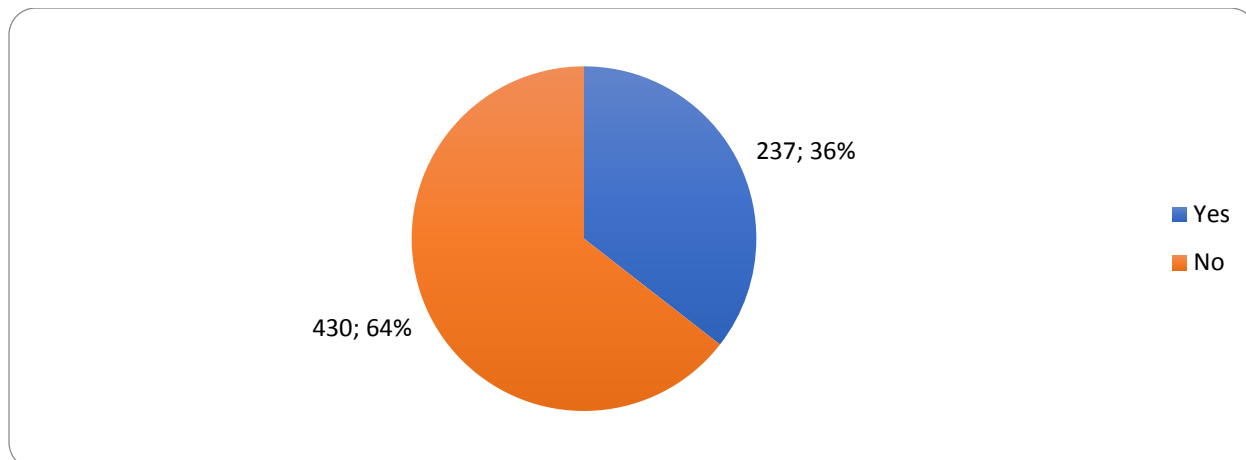
All respondents were asked how often they take the bus. 34.1% of respondents said they take the bus almost every day, 21.4% said a couple times per week, 12.5% said 1-5 times per month, and 12.2% said often several times per day. Additionally, 7.8% said they take the bus 1-5 times per year, 6.5% said a dozen times per year, and 5.5% said less than once per year.



**Figure 21. How often do you take the bus?**

**Question 14**

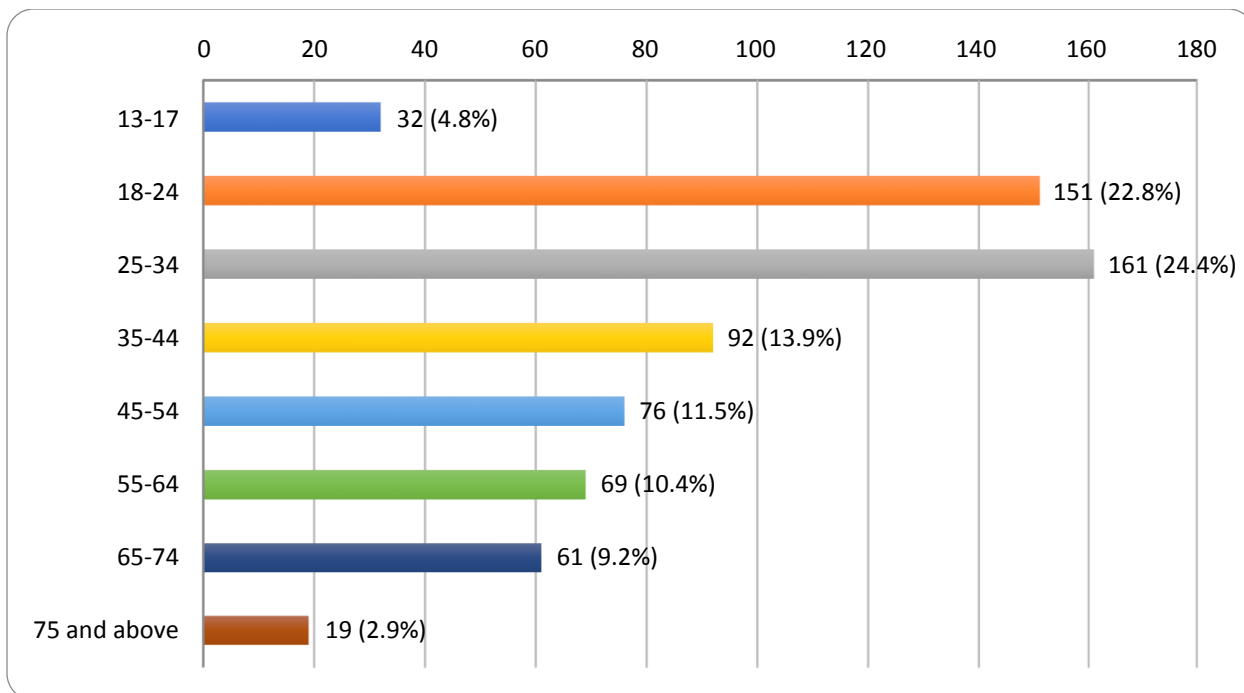
Respondents were also asked if they have access to a personal vehicle. Approximately two thirds (64%) said they do not have access to a personal vehicle and the remaining 36% said they do.



**Figure 22. Do you have access to a personal vehicle?**

**Question 15**

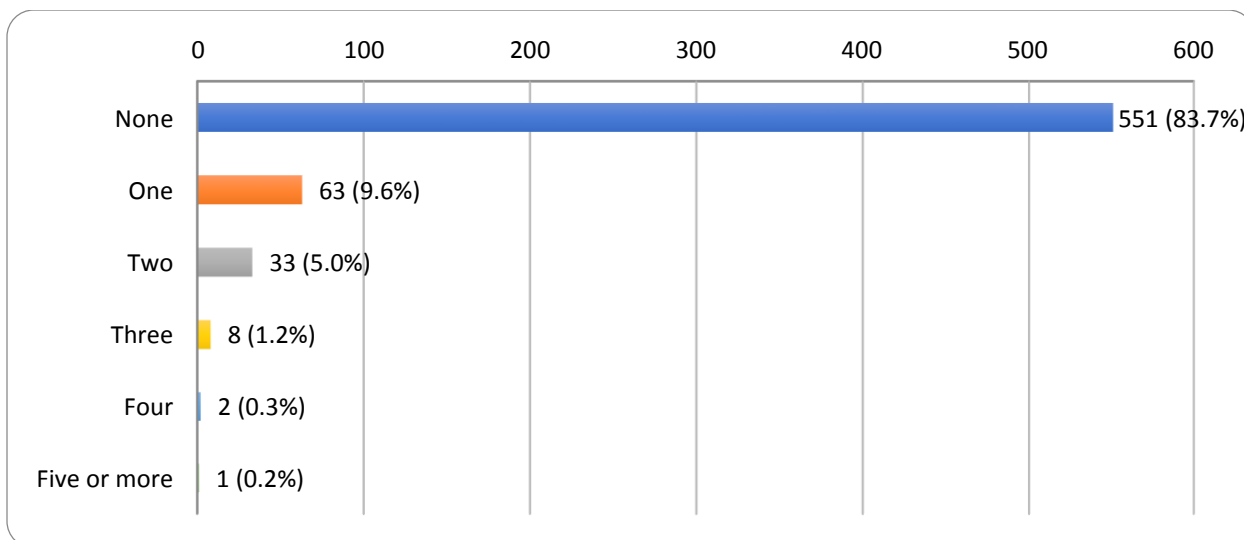
Respondents were asked about their age range. 24.4% of respondents said they are aged 25-34, 22.8% are aged 18-24, 13.9% are aged 35-44, 11.5% are aged 45-54, 10.4% are aged 55-64, 9.2% are aged 65-74, 4.8% are aged 13-17, and 2.9% are aged 75 and above.



**Figure 23. What is your age range?**

**Question 16**

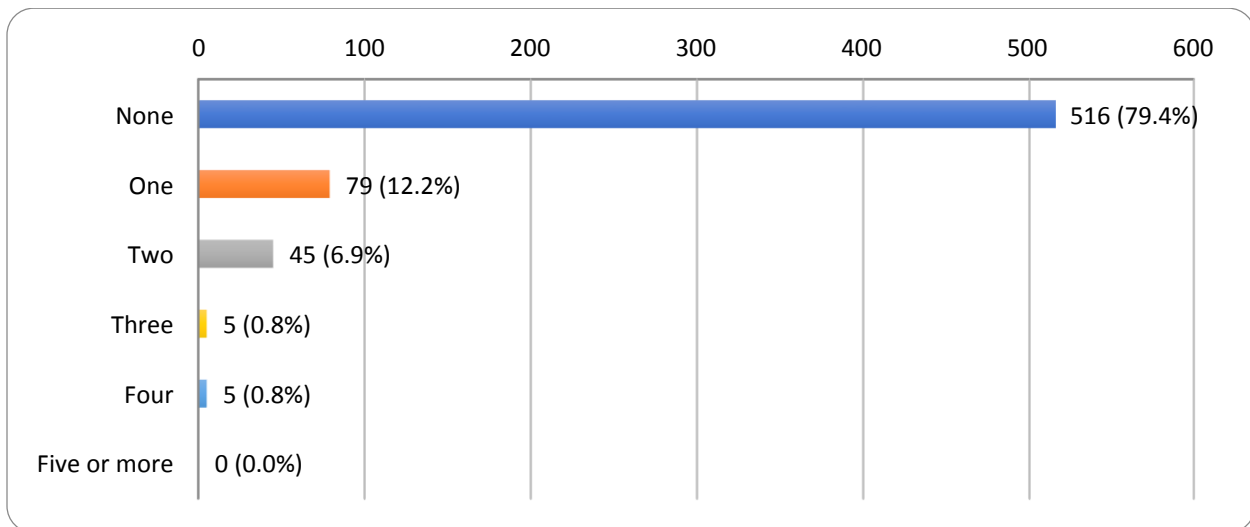
Respondents were asked how many children living in their household are under the age of 12. Most respondents (83.7%) do not have any children living in their household. Additionally, 9.6% have one child in their household, 5.0% have two children, 1.2% have three children, 0.3% have four children, and 0.2% have five or more children.



**Figure 24. How many children are in your household (under age 12)?**

### Question 17

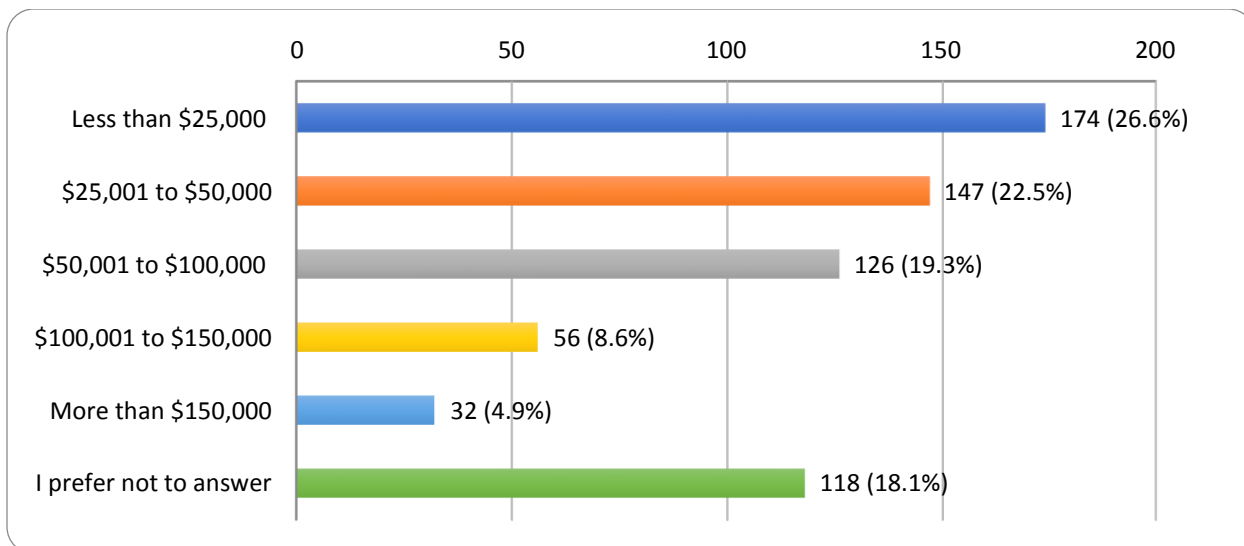
Respondents were also asked how many youths aged 13-18 live in their household. Most respondents (79.4%) do not have any youths living in their household. Additionally, 12.2% have one youth living in their household, 6.9% have two youths, 0.8% have three youths, and 0.8% have four youths. There were no respondents with five or more youths living in their household.



**Figure 25. How many youths are in your household (aged 13-18)?**

### Question 18

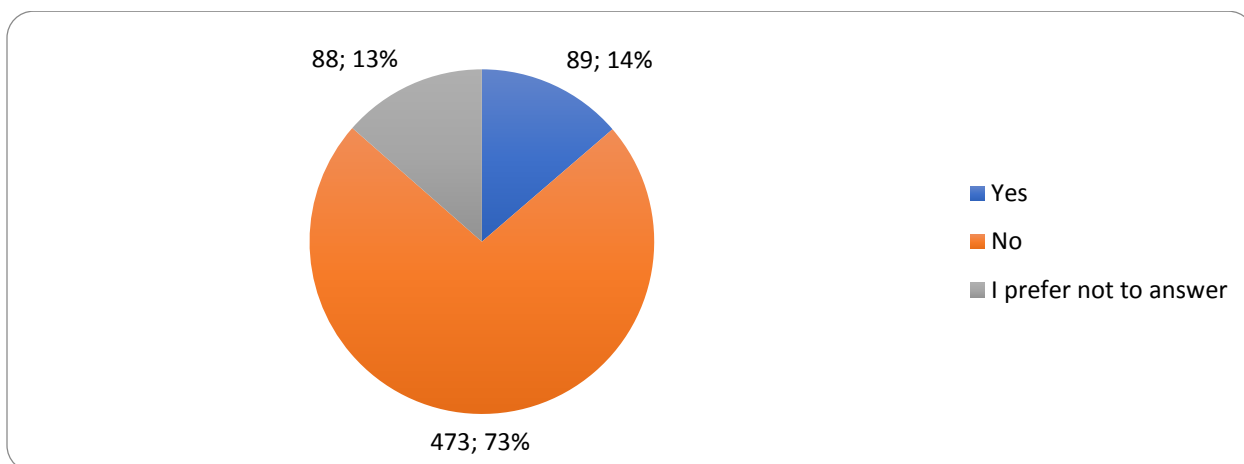
Respondents were asked what their annual household income is. 26.6% of respondents said their annual household income is less than \$25,000; 22.5% said their annual household income is between \$25,001 and \$50,000; and 19.3% said their annual household income is between \$50,001 and \$100,000. Another 8.6% said their annual household income is between \$100,001 to \$150,000, and 4.9% said their annual household income is more than \$150,000. 18.1% said they prefer not to answer.



**Figure 26. What is your annual household income?**

**Question 19**

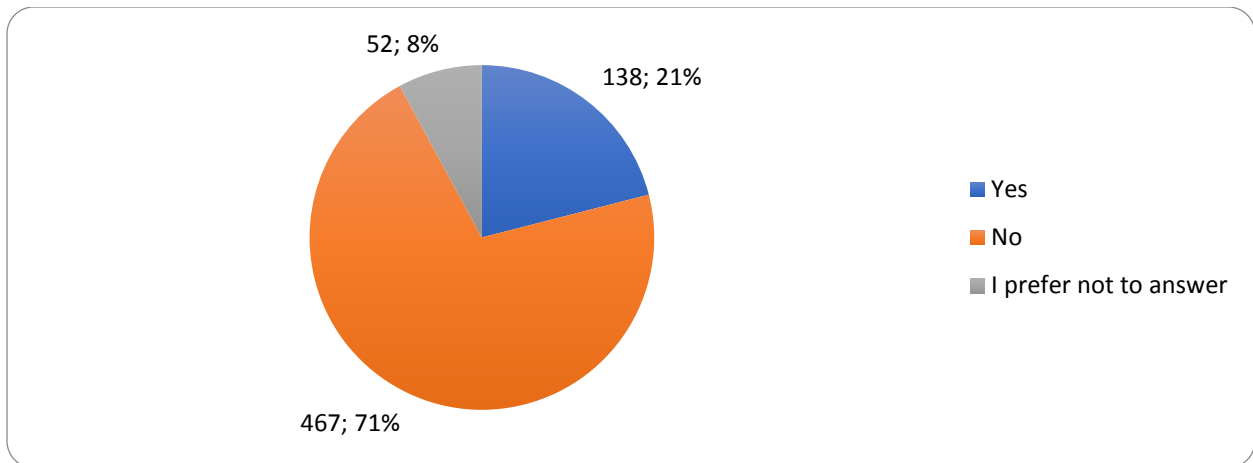
Respondents were asked if they identify as a member of an ethnic or racialized group. 73% of respondents said they do not while 14% said they do. 13% said they prefer not to answer.



**Figure 27. Do you identify as a member of an ethnic or racialized group?**

**Question 20**

Respondents were asked if they, or someone in their household, identify as a person with disabilities and/or have accessibility needs. 71% of respondents answered no while 21% answered yes. 8% said they prefer not to answer.



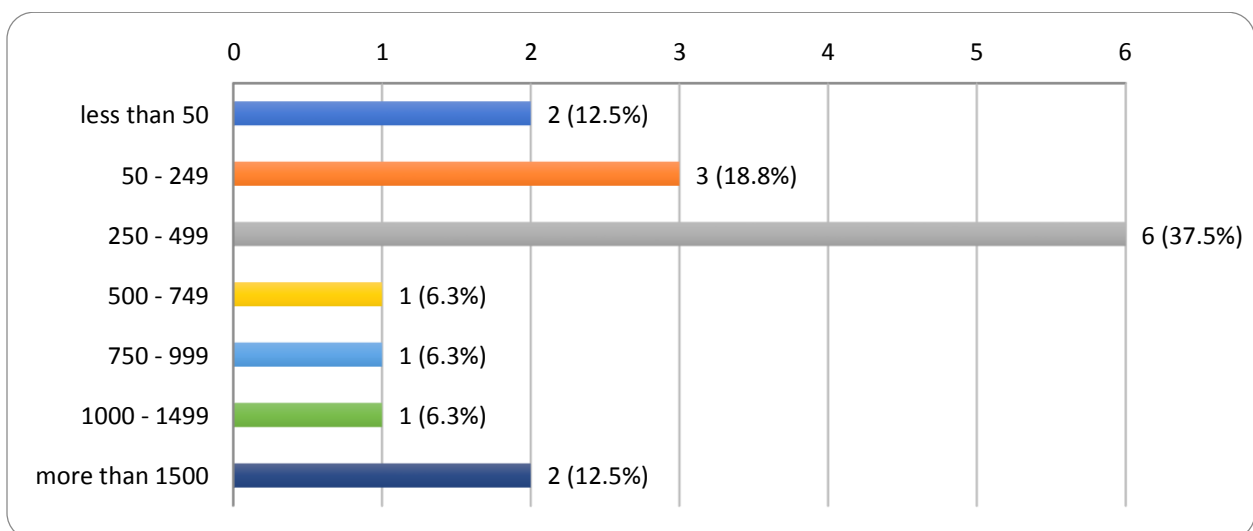
**Figure 28. Do you identify as a person with a disability or are you or anyone in your household a person with accessibility needs?**

### **Corporate Pass program: Employer survey**

There were 16 responses to this survey, some of which employers completed independently online while others were completed via verbal interview and responses were entered by Transit staff.

#### **Question 1**

Respondents were first asked how many employees they have in total. 37.5% of employers that responded have between 250 and 499 employees, and 18.8% have between 50 and 249 employees. Additionally, 12.5% have more than 1500 employees and another 12.5% have less than 50 employees. Finally, 6.3% have between 500 and 799, 6.3% have between 750 and 999, and 6.3% have between 1000 and 1499.



**Figure 29. How many employees do you have in total?**

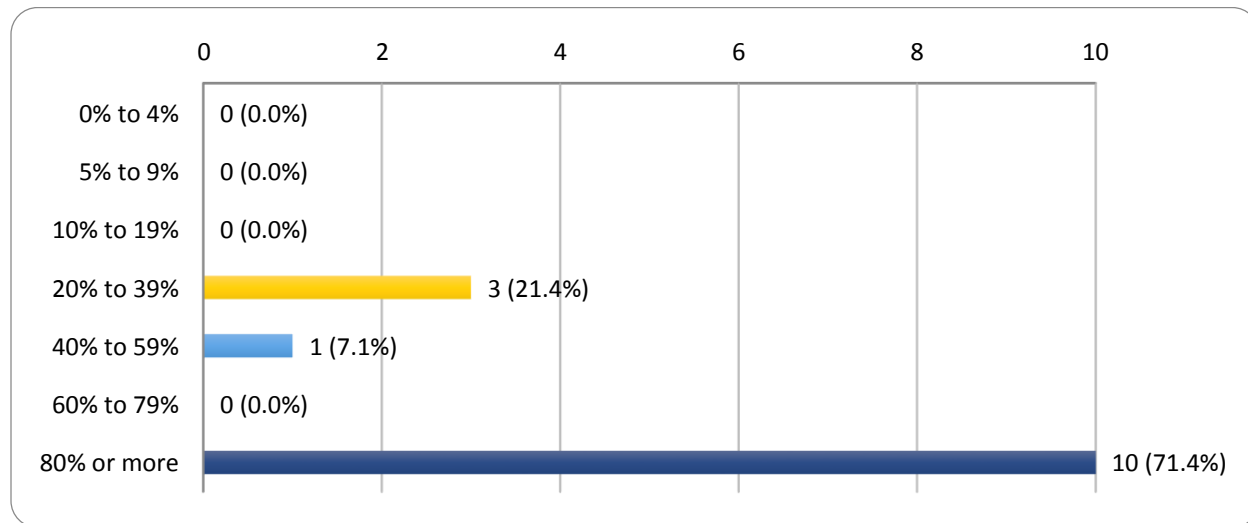


## Question 2

Respondents were asked for the breakdown of what modes their employees use to get to work.

### Question 2.1

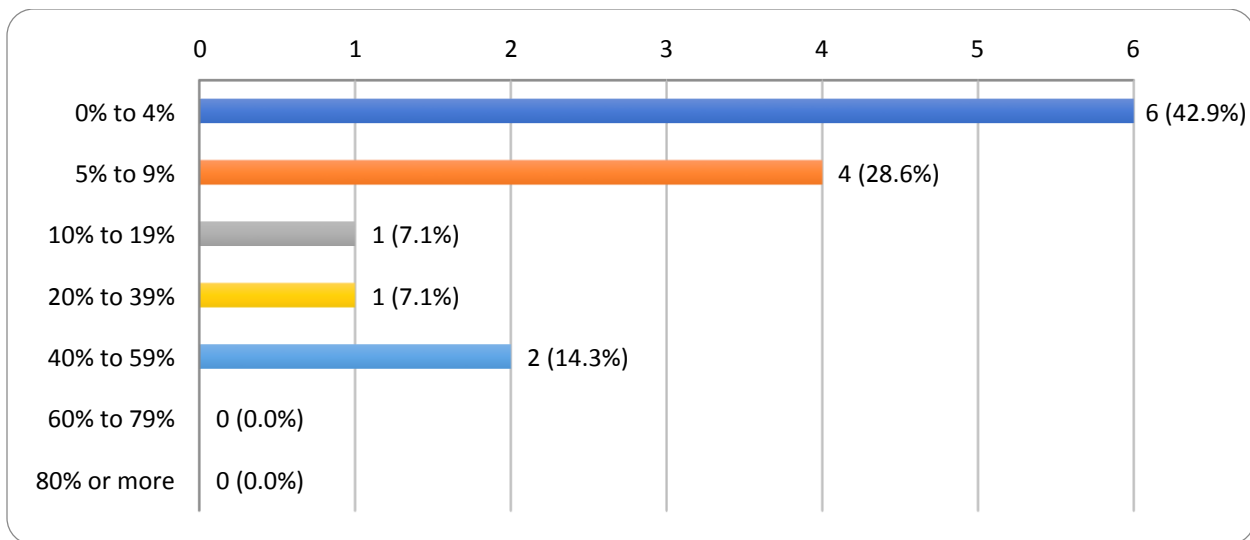
71.4% of respondents said that 80% or more of their employees get to work by driving a private vehicle alone. Another 21.4% said that 20% to 39% of their employees drive alone and the remaining 7.1% said that 40% to 59% of their employees drive alone.



**Figure 30. What percentage of your employees get to work by driving alone?**

### Question 2.2

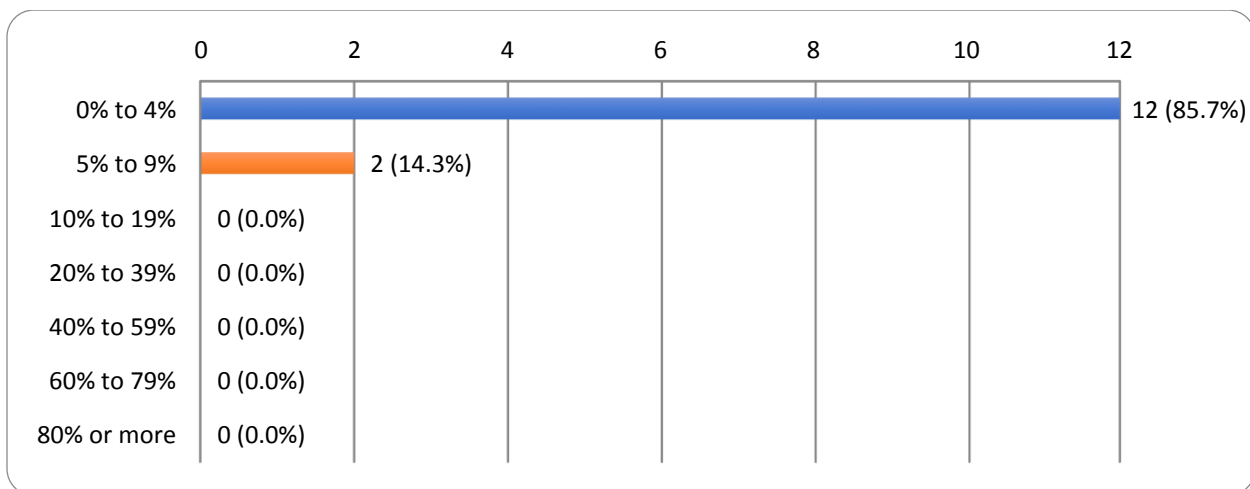
42.9% of respondents said that 0% to 4% of their employees get to work by carpooling. 28.6% said 5% to 9% of their employees carpool, 7.1% said 10% to 19% of their employees carpool, and another 7.1% said 20% to 39% of their employees carpool. The remaining 14.3% said 40% to 59% of their employees carpool.



**Figure 31. What percentage of your employees get to work by carpooling?**

**Question 2.3**

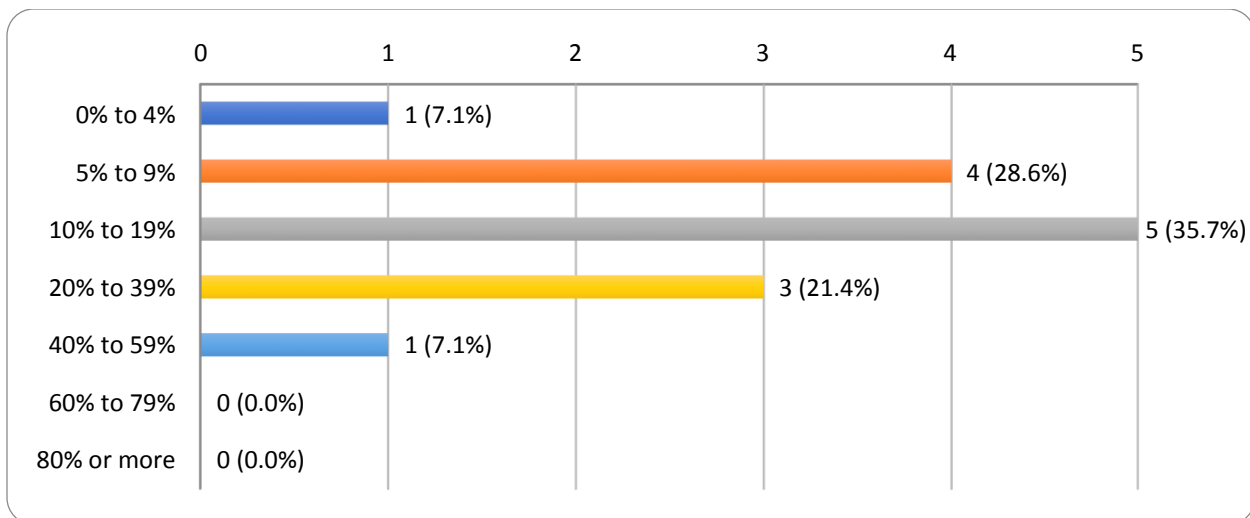
85.7% of respondents said 0% to 4% of their employees get to work by taxi, Uber, or similar car for hire. The remaining 14.3% said 5% to 9% of their employees get to work by a car for hire.



**Figure 32. What percentage of your employees get to work by taxi, Uber, or similar car for hire?**

**Question 2.4**

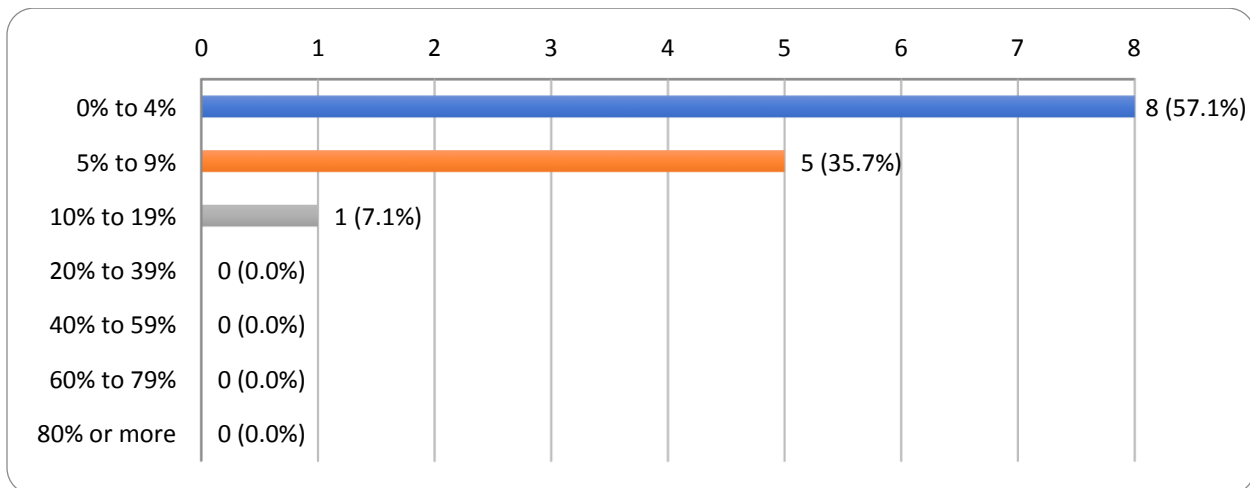
35.7% of respondents said that 10% to 19% of their employees get to work by taking public transit. 28.6% said 5% to 9% of their employees take transit, 21.4% said 20% to 39% of their employees take transit, and 7.1% said 40% to 59% of their employees take transit. The remaining 7.1% said 0% to 4% of their employees take transit.



**Figure 33. What percentage of your employees get to work by taking public transit?**

**Question 2.5**

57.1% of respondents said that 0% to 4% of their employees get to work using active transportation, such as by bike, scooter, or walking. Another 35.7% said 5% to 9% of their employees use active transportation, and 7.1% said 10% to 19% of their employees use active transportation.

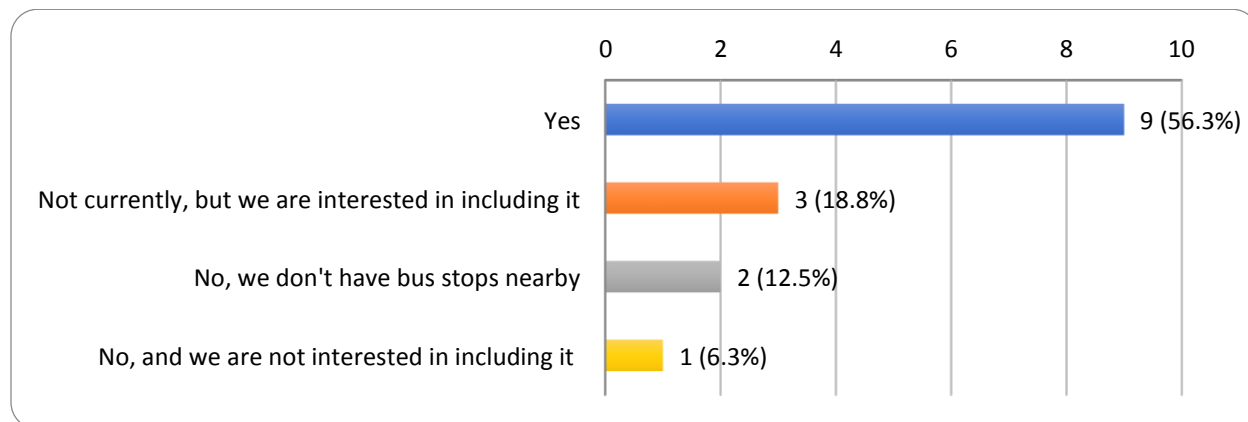


**Figure 34. What percentage of your employees get to work by using active transportation?**

**Question 3**

Respondents were asked if transit access is a part of their employee retention plans. 56.3% of respondents said that, yes, transit access is included in these plans. Another 18.8% said that transit was not currently part of their retention plans but wanted to include it, while 12.5% said no

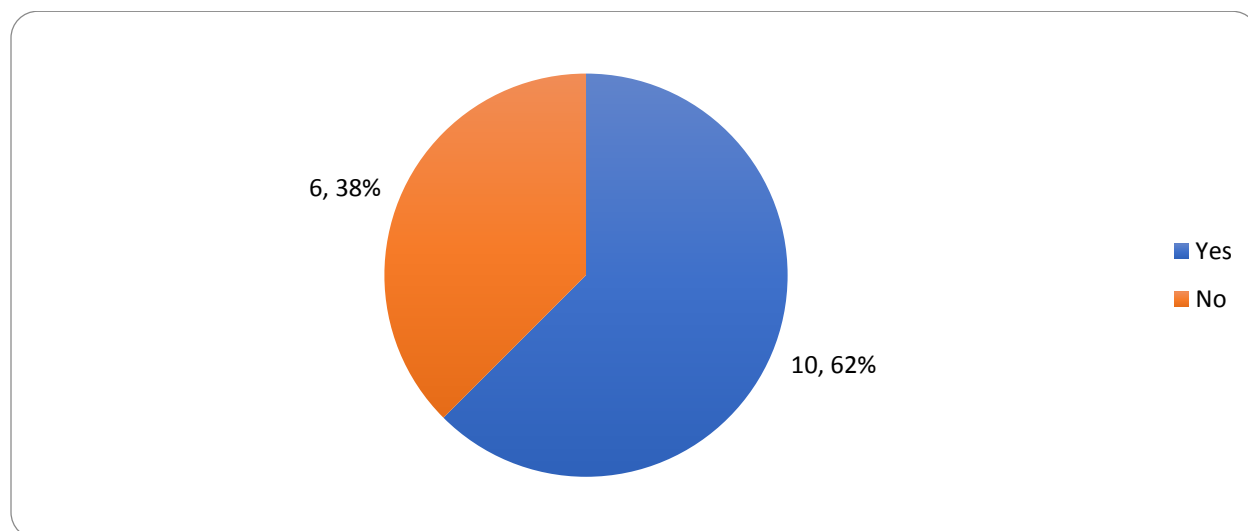
because there is no access to transit at their facility. The remaining 6.3% said no, and it is not something they wish to include in their retention plans.



**Figure 35. Is transit access factored into your employee attraction and retention plans or measurement?**

#### **Question 4**

This question was followed up by explaining to respondents what a Corporate Pass is, in which both the City and the employer contribute to discounted monthly passes for employees. They were then asked if they felt that a Corporate Pass would benefit their employee retention plan. 62.5% of respondents said, yes, a Corporate Pass would benefit their employee retention plan. The remaining 37.5% said, no, it would not.

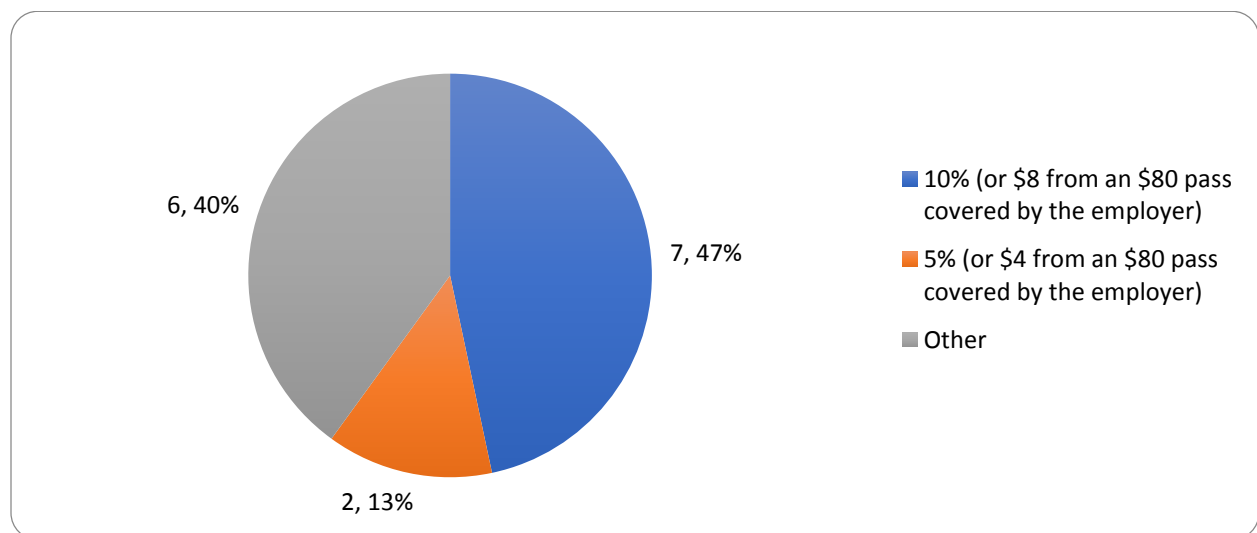


**Figure 36. Could offering a Corporate Pass benefit your employee attraction and retention efforts?**

### Question 5

Respondents were then asked to quantify offering a Corporate Pass by determining what kind of discount is appropriate for employers to cover. 46.7% of respondents felt that 10% was an appropriate amount for the employer to cover, 13.3% felt that 5% was an appropriate amount for the employer to cover, and the remaining 40.0% said 'other' and were asked to specify.

One third of those that said 'other' felt that more than 10% but less than 20% was appropriate. Another third said more than 20% was appropriate. The remaining third either were not sure what the appropriate discount should be or felt the employer should not have to pay anything.



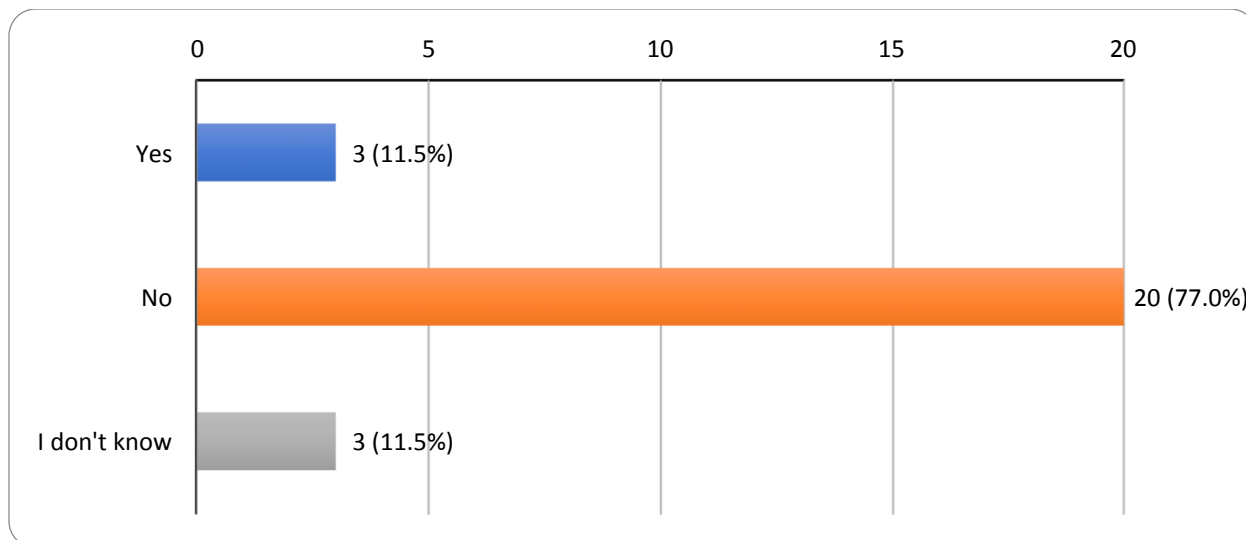
**Figure 37. A monthly transit pass for adults currently costs \$80. If we were to offer Corporate Pass programs for companies of your size, what kind of discount is appropriate for the employer to cover?**

### Corporate Pass program – Employee Survey

There were 26 responses to this survey that were completed online at [haveyoursay.guelph.ca](http://haveyoursay.guelph.ca).

### Question 1

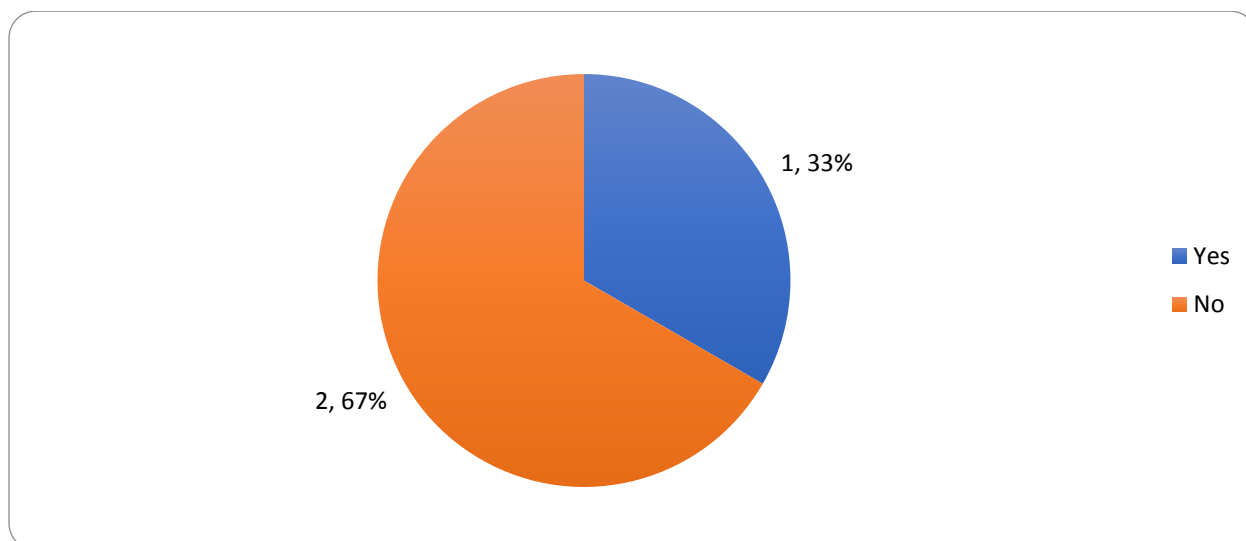
Respondents were asked if their employer currently offers a Corporate Pass. 77.0% of respondents said, no, their employer does not currently offer a Corporate Pass. 11.5% said yes, their employer does offer a Corporate Pass, and another 11.5% said they were not sure whether their employer offered a Corporate Pass.



**Figure 38. Does your employer currently offer a transit Corporate Pass?**

**Question 1.1**

The three respondents to question 1 that said their employer offers a Corporate Pass were asked a follow up question to determine whether they participated in the program. 66.7% said no, they do not use a Corporate Pass while 33.3% said they yes, they do.

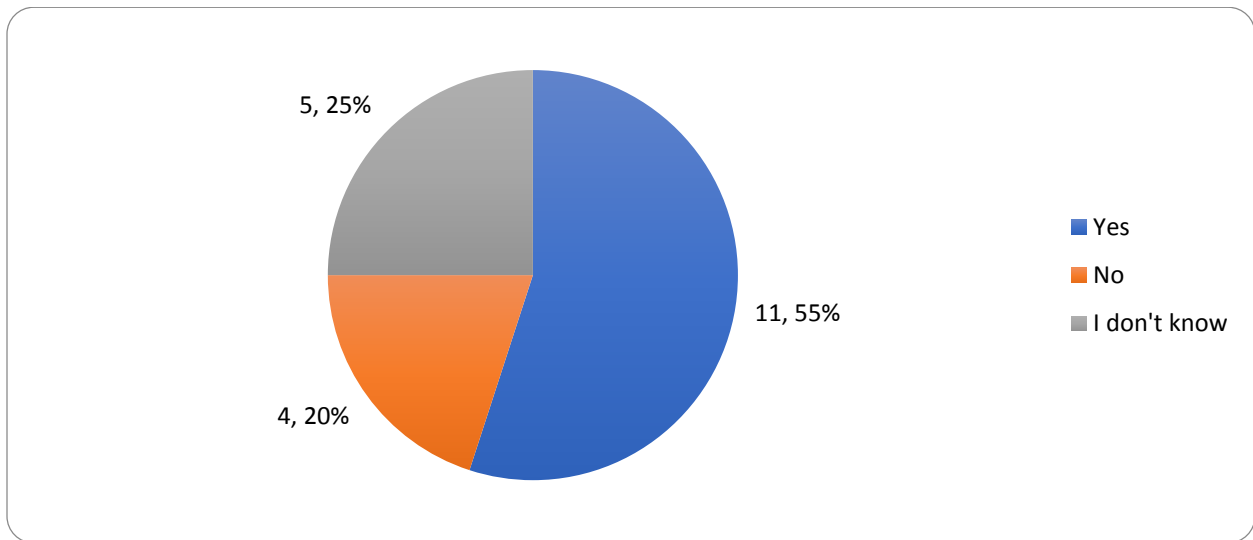


**Figure 39. Do you make use of the available Corporate Pass?**

**Question 1.2**

The 20 respondents to question 1 that said their employer does not offer a Corporate Pass were asked a follow up question to determine which of them would participate in the program if it were offered. 55% of respondents said

they would use a Corporate Pass if it were available, 20% said they would not, and 25% said they were not sure if they'd use it.

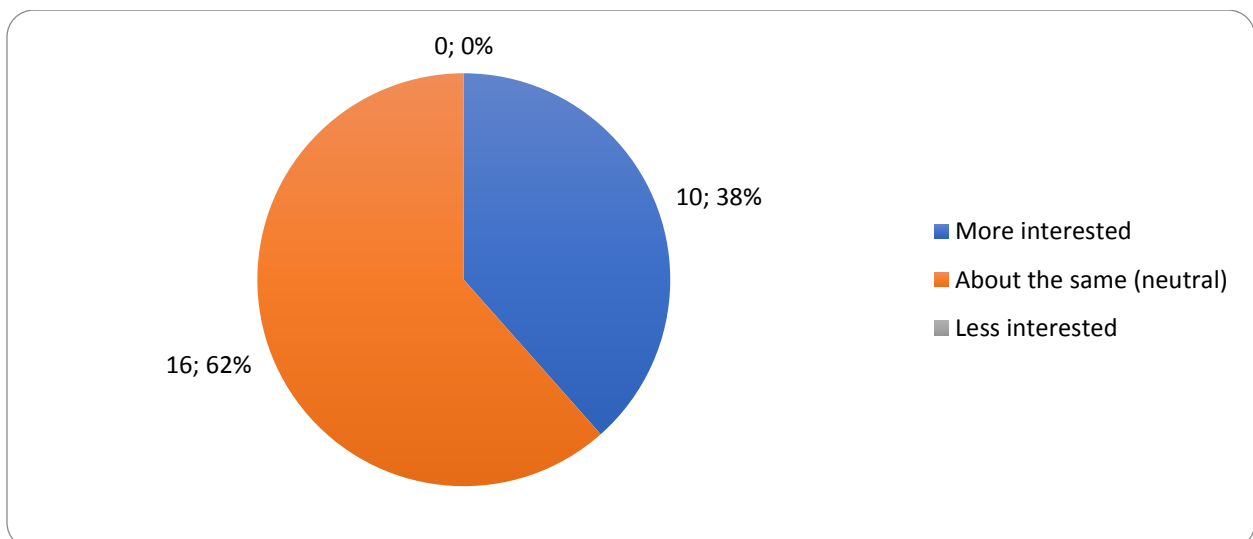


**Figure 40. If a Corporate Pass were available, would you make use of it?**

### **Question 2**

All respondents were asked about how their level of interest in working for their employer would change if a Corporate Pass were offered.

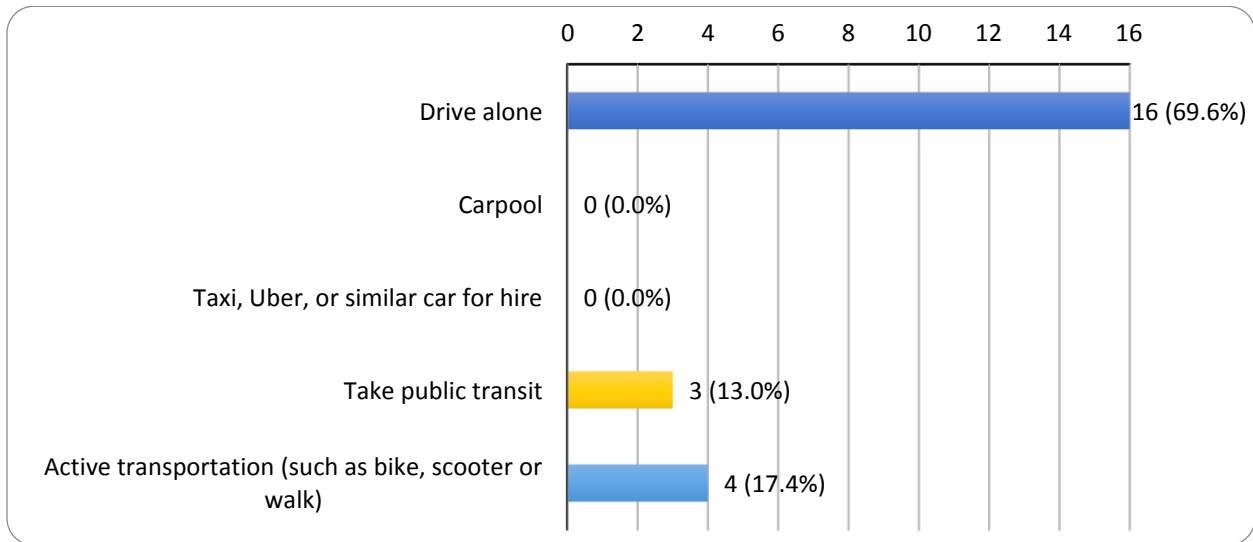
Approximately two thirds (61.5%) of respondents said their interest in working for their employer would be about the same if a Corporate Pass were offered while the remaining third (38.5%) said they would be more interested. None of the respondents said they would be less interested.



**Figure 41. If a Corporate Pass were offered, would it change your interest level in continuing to work for this employer?**

### Question 3

Respondents were also asked how they usually commute to work. 69.6% said they usually drive alone, 17.4% said they usually use some form of active transportation, and 13.0% said they usually take public transit. None of the respondents said they usually carpool or take a taxi, Uber, or similar car for hire.

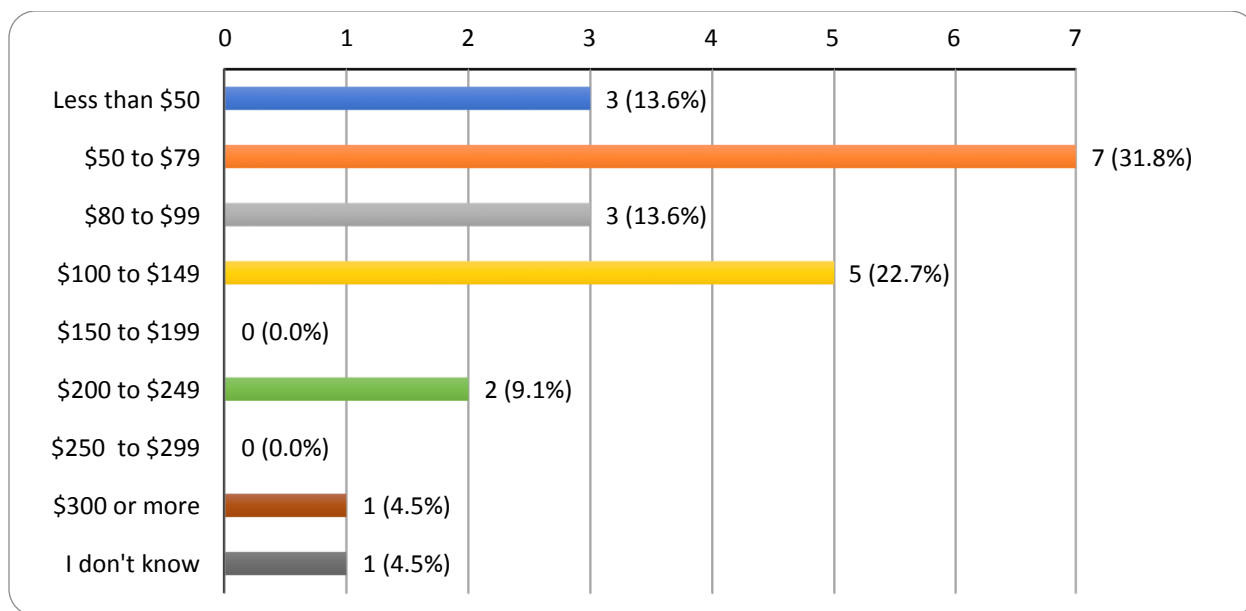


**Figure 42. How do you usually commute to work?**

### Question 4

All respondents were asked how much money they spend on commuting to work monthly. 31.8% of respondents said they spend between \$50 to \$79 on their monthly commute. 22.7% said they spend \$100 to \$149, 13.6% said they spend less than \$50, and another 13.6% said they spend \$80 to \$99 monthly. 9.1% said they spend \$200 to \$249, 4.5% said they spend \$300 or more, and the remaining 4.5% said they did not know how much they spend monthly.





**Figure 43. How much does your current work commute cost per month?**

### Online reload satisfaction survey

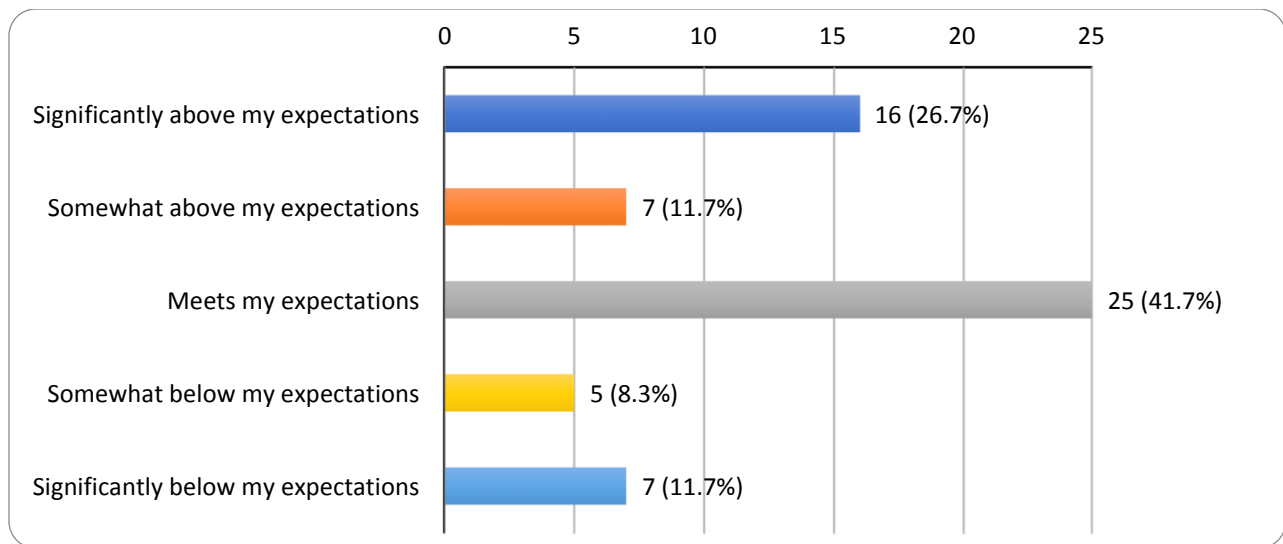
There were 60 responses to this survey that were all completed online at [haveyoursay.guelph.ca](http://haveyoursay.guelph.ca).

### Question 1

Respondents were asked to rank their experience with reloading their OnYourWay card online through four questions.

#### Question 1.1

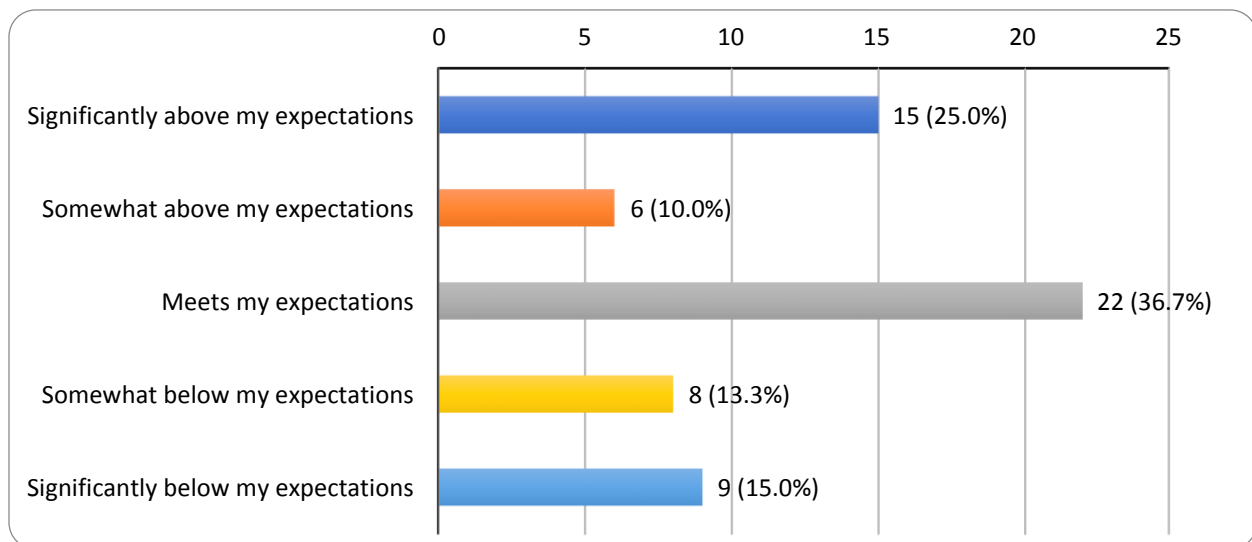
Respondents were asked to rank their experience with how quick it is to reload their OnYourWay card online. 41.7% said it meets their expectations, 26.7% said it is significantly above their expectations, and 11.7% said it is somewhat above their expectations. The remaining 11.7% and 8.3% said it is significantly below their expectations and somewhat below their expectations, respectively.



**Figure 44. How quick is it to reload?**

### **Question 1.2**

Respondents were asked to rank their experience with how easy it is to reload their OnYourWay card online. 36.7% said it meets their expectations, 25.0% said it is significantly above their expectations, and 10.0% said it is somewhat above their expectations. The remaining 15.0% and 13.3% said it is significantly below their expectations and somewhat below their expectations, respectively.

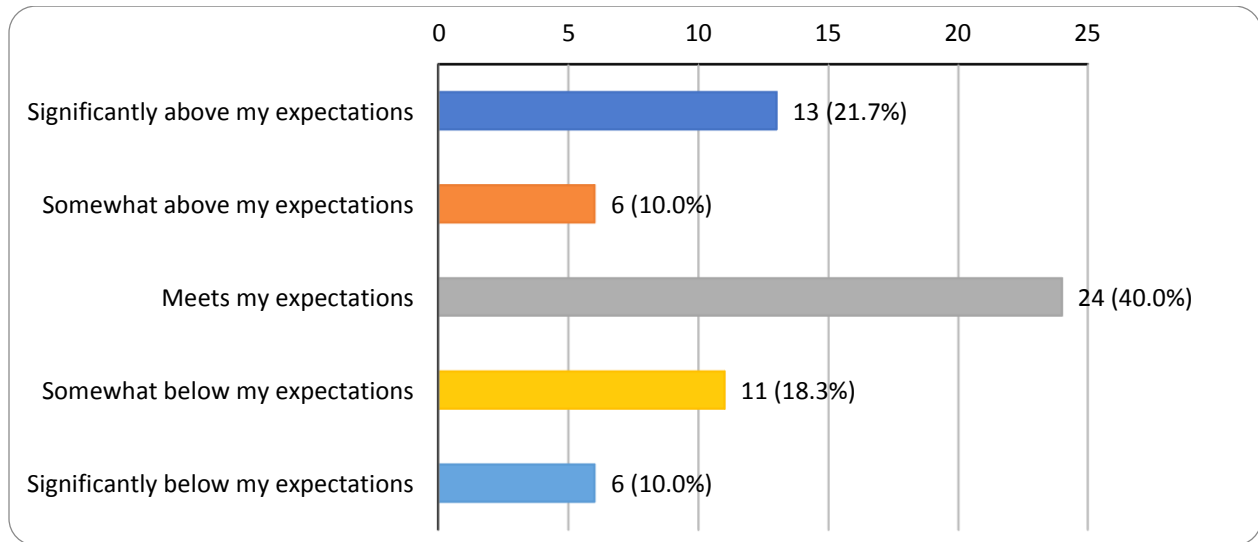


**Figure 45. How easy is it to reload?**

### **Question 1.3**

Respondents were asked to rank their experience with how clear the instructions are to reload their OnYourWay card online. 40.0% said it meets

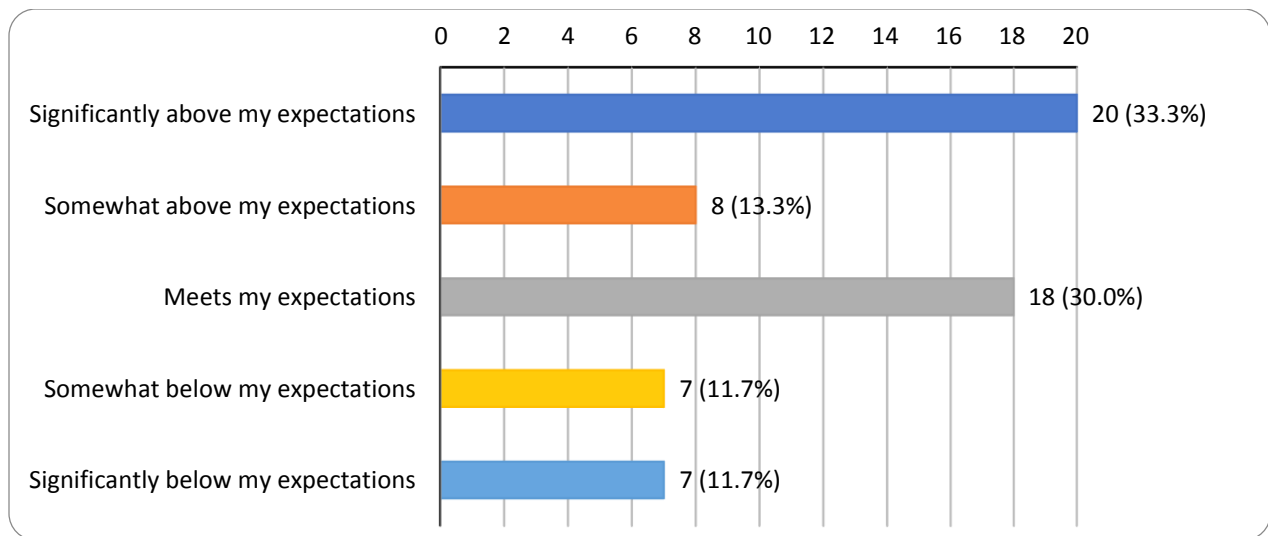
their expectations, 21.7% said it is significantly above their expectations, and 10.0% said it is somewhat above their expectations. The remaining 18.3% and 10.0% said it is somewhat below their expectations and significantly below their expectations, respectively.



**Figure 46. How clear are the instructions?**

**Question 1.4**

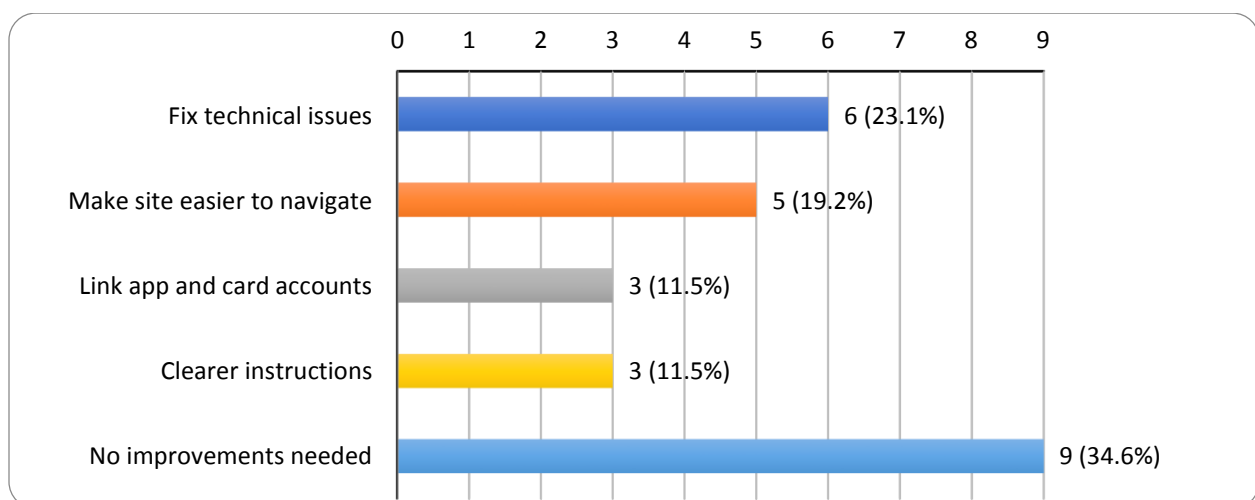
Respondents were asked to rank their experience with how convenient it is to reload their OnYourWay card online. 30.0% said it meets their expectations, 33.3% said it is significantly above their expectations, and 13.3% said it is somewhat above their expectations. The remaining 11.7% and 11.7% said it is somewhat below their expectations and significantly below their expectations, respectively.



**Figure 47. How convenient is it to reload online?**

### Question 2

Respondents were asked an open-ended question on how the experience of reloading their OnYourWay card could be improved. Of the 52% of respondents that answered this question, 34.6% said that no improvements are needed. 23.1% said the reloading experience could be improved by fixing technical issues and 19.2% said the website could be made easier to navigate. Another 11.5% said the accounts for the OnYourWay card and mobile app could be linked and the remaining 11.5% said clearer instructions could be provided to improve overall experience.



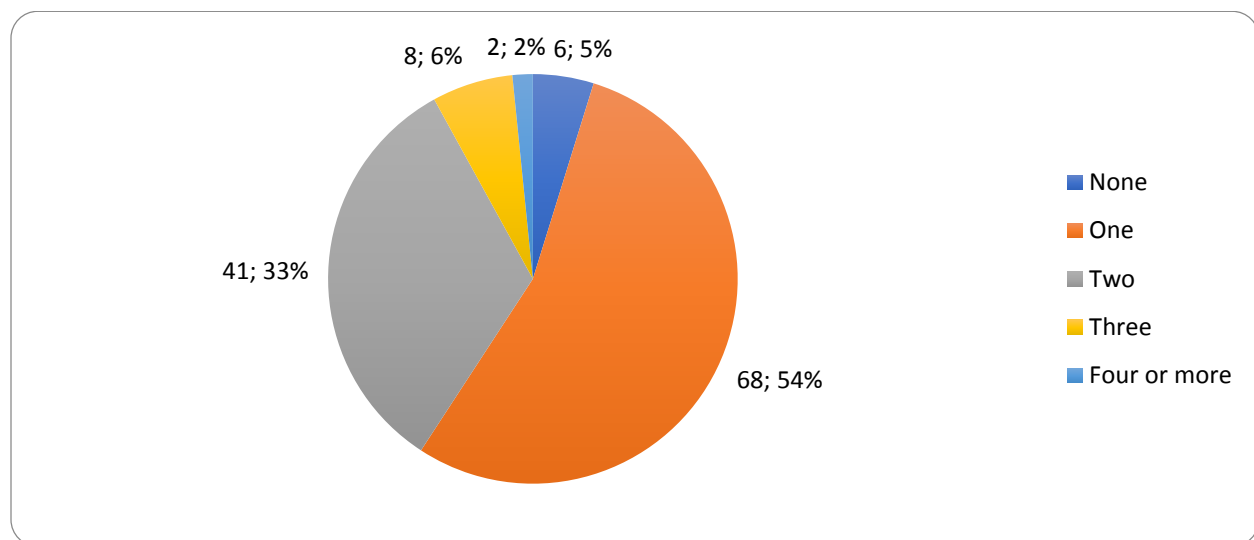
**Figure 48. How can we improve your experience reloading your OnYourWay card online?**

## High school student discount pass survey

There were 125 responses to this survey that were completed online at [haveyoursay.guelph.ca](http://haveyoursay.guelph.ca).

### Question 1

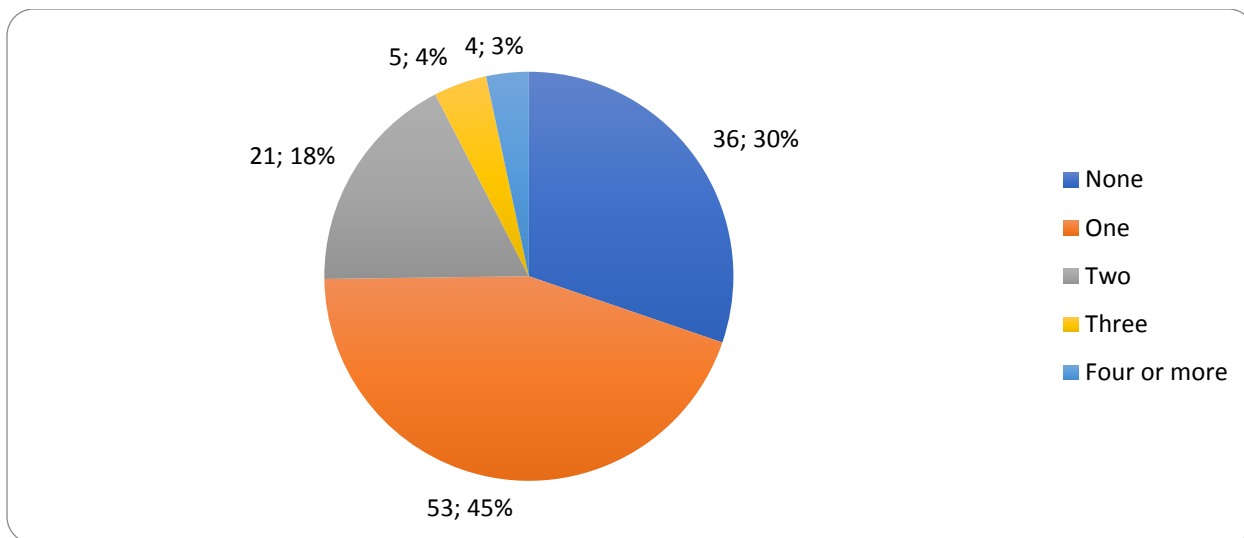
Respondents were asked how many youths aged 13-18 they make transit decisions for. Over half (54.4%) of respondents said they make transit decisions for one youth, and one third (32.8%) said they make transit decisions for two youths. Another 6.4% said they make transit decisions for three youths, 1.6% said they make transit decisions for four or more youths, and the remaining 4.8% said they do not make transit decisions for any youths.



**Figure 49. How many youths aged 13-18 (including yourself if applicable) do you make transit decisions for?**

### Question 2

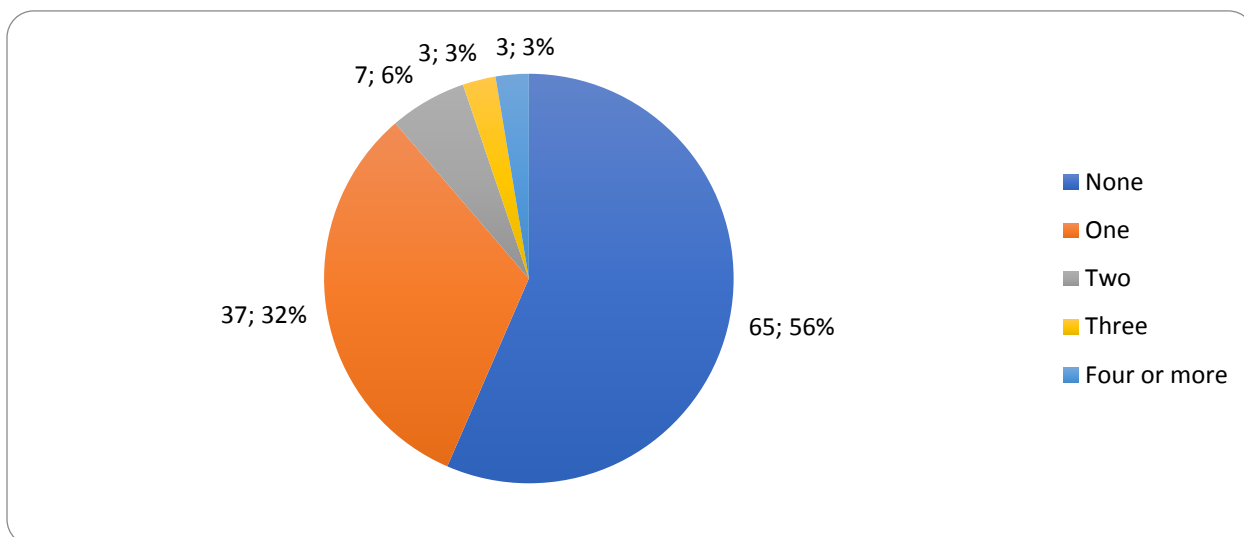
Respondents were then asked how many of the youth in their household take transit to school. 44.5% said one youth takes transit to school, 17.6% said two youths, 4.3% said three youths, and 3.4% said four or more youths. The remaining 30.3% said none of the youth in their household take transit to school.



**Figure 50. How many of the youth in your household currently take transit (City bus) to school? (At least a few times each month)**

### **Question 3**

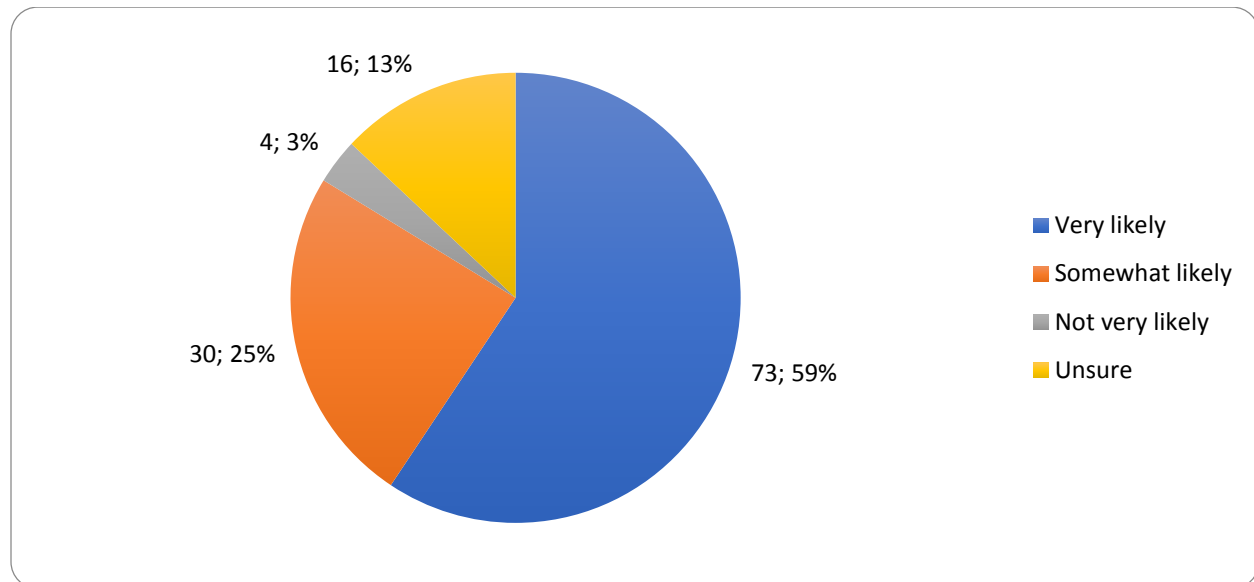
Of those youth that take transit to school, respondents were asked how many of them use a monthly pass. 32.2% said one youth in their household uses a monthly pass, 6.1% said two youths, 2.6% said three youths, and 2.6% said four or more youths. The remaining 56.5% said none of the youths in their household use a monthly pass.



**Figure 51. Of the youth in your household who do take transit, how many use a monthly pass (rather than pay-per-use fares such as cash or e-rides)?**

#### Question 4

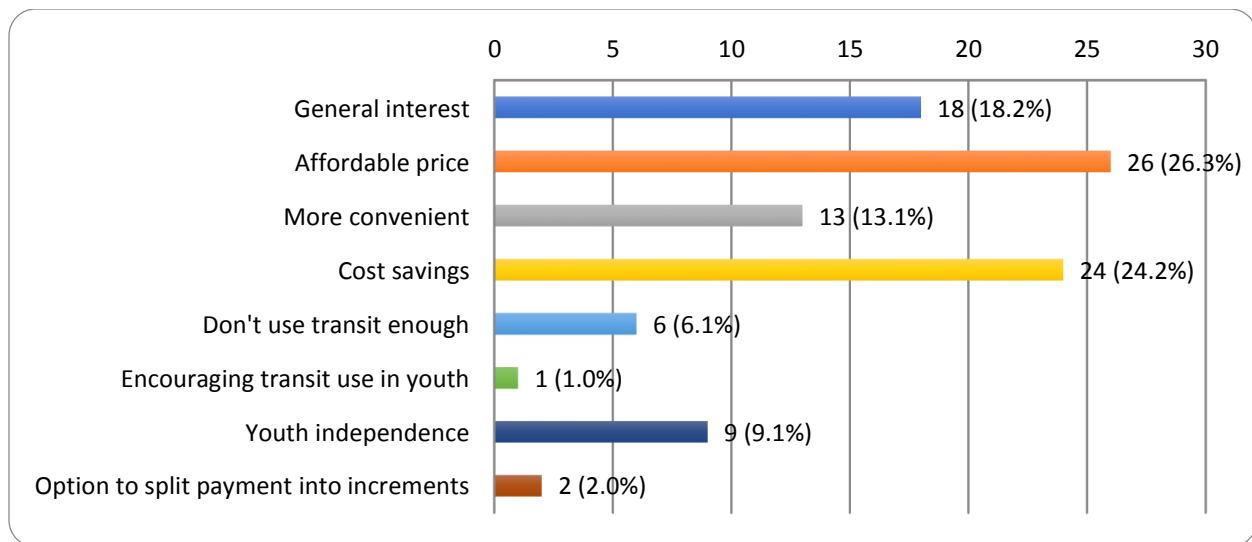
Respondents were asked how likely they are to switch to a five-month semester pass that is paid up front but offers a better discount than the monthly pass, if it were offered. 59.3% said they would be very likely to switch to the semester pass, 24.4% said they would be somewhat likely to switch to the semester pass, and 3.3% said they were not very likely to switch to the semester pass. The remaining 13.0% were unsure if they would switch to a semester pass.



**Figure 52. How likely would you be to switch to a semester pass for some, or all, of the youth in your household?**

#### Question 5

Respondents were asked an open-ended question on why or why not they would be interested in a semester pass. The responses were grouped into similar categories. 26.3% said they would be interested if the semester pass were an affordable price, and 24.2% said they would be interested if the discount were large enough to provide significant cost savings. Another 18.2% were generally interested in the semester pass program. 13.1% were interested in the semester pass program because of the convenience of not having to reload monthly passes. 9.1% were interested due to the increased independence a semester pass would give youth and 1.0% were interested because they believed this would encourage transit use among youth. 6.1% were not interested because the youth in their household do not use transit enough for purchasing a semester pass to make sense. 2.0% would only be interested if instead of paying for five months up front, they could split the payment into increments.

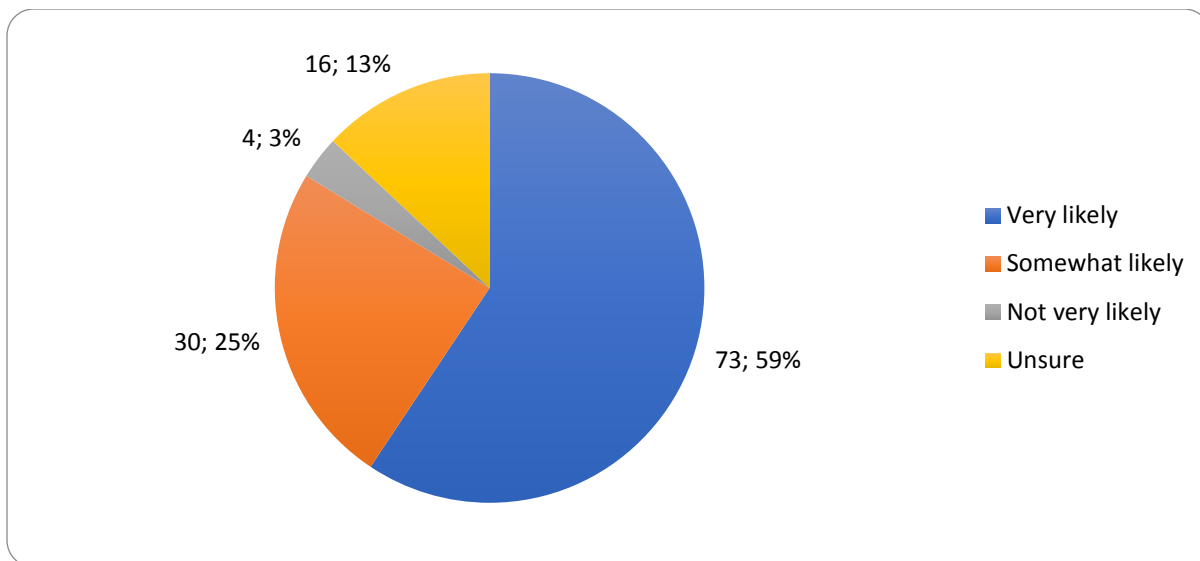


**Figure 53. Please let us know why you would or would not be interested in a semester pass.**

### **Question 6**

Similarly, respondents were asked how likely they would be to purchase a two-month youth summer pass for July and August if it were a “buy one month, get one month free” deal. 59.3% of respondents said they would be very likely to purchase the summer pass for youth in their household, and 24.4% said they would be somewhat likely to purchase the summer pass. 3.3% said it is not very likely they would purchase the summer pass. The remaining 13.0% said they were unsure if they would purchase a summer pass.

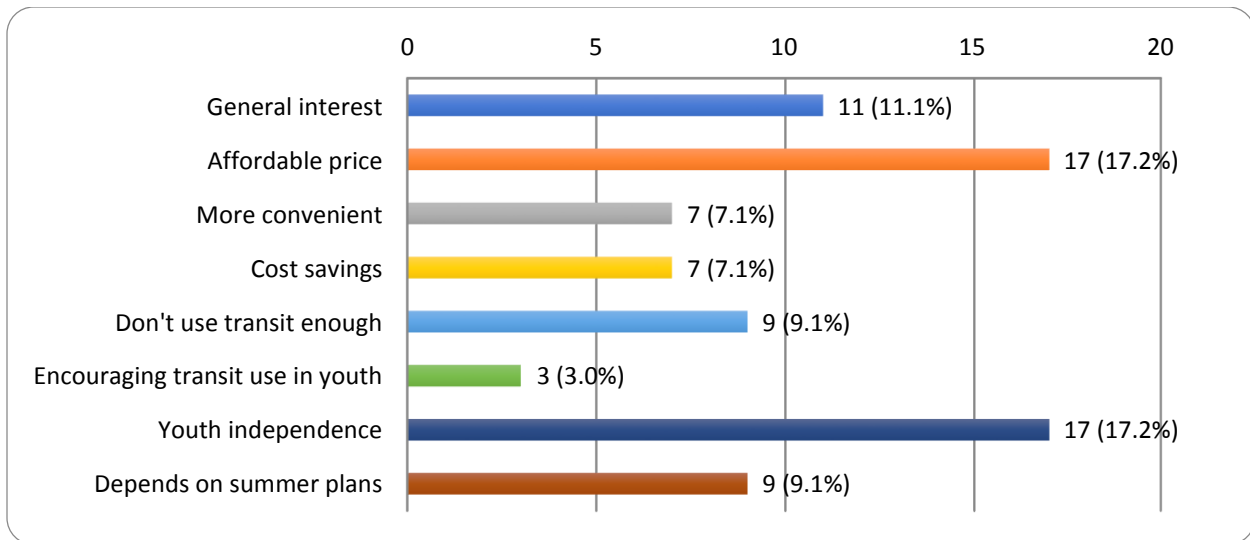




**Figure 54. How likely would you be to purchase a summer pass for some or all the youth in your household?**

**Question 7**

Respondents were asked an open-ended question on why or why not they would be interested in a summer pass. The responses were grouped into similar categories. 17.2% said they are interested because the summer pass is an affordable price, and another 17.2% said they were interested due to the increased independence a summer pass would give youth. 11.1% were generally interested in the summer pass program. 7.1% said they were interested due to the convenience of not having to reload monthly passes, and an additional 7.1% said they were interested due to cost savings the summer pass provides. 3.0% were interested because they believed this would encourage transit use among youth. 9.1% said they were not interested because the youth in their household do not use transit enough for purchasing a summer pass to make sense. Another 9.1% said they were not sure if they would purchase a summer pass for their youth as it would depend on their summer plans.



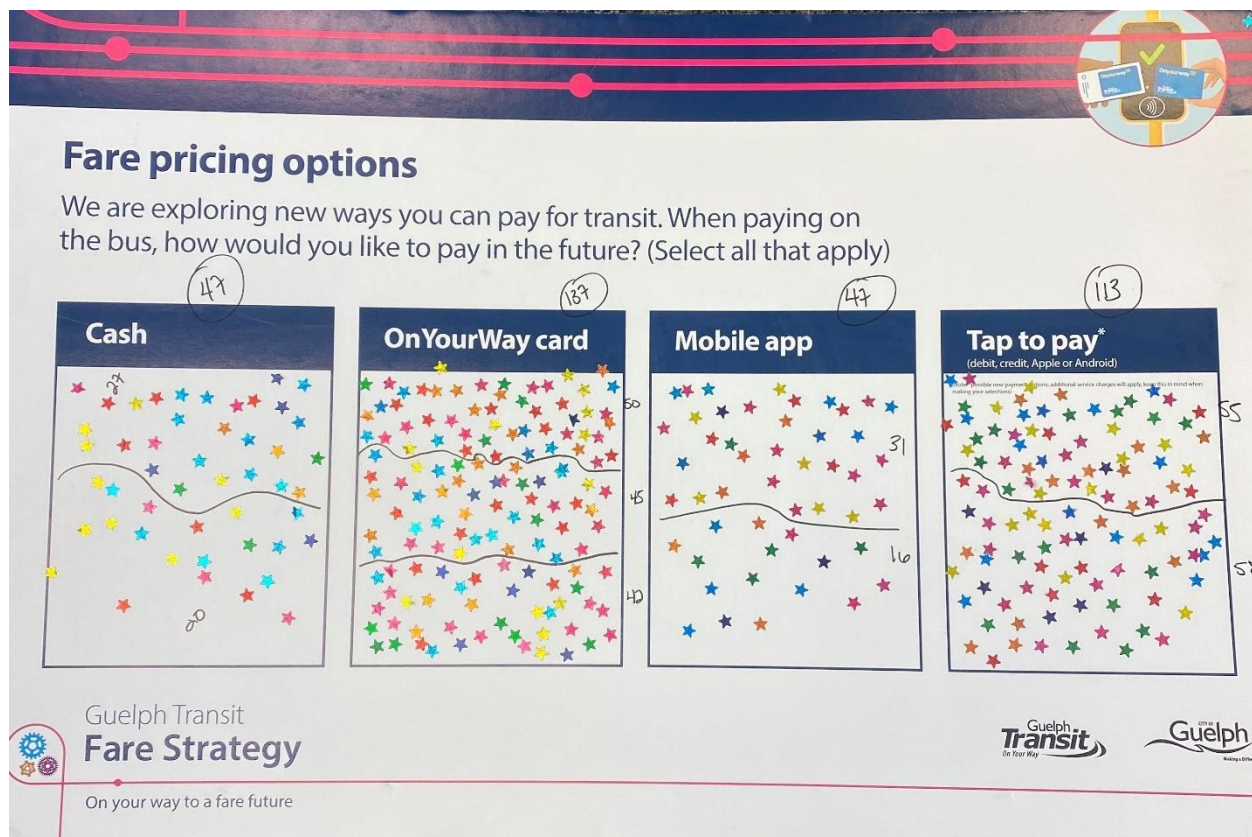
**Figure 55. Please let us know why you would or would not be interested in a summer pass.**

## 4.3 Open house and intercept responses

### Intercept Boards

#### *Fare pricing options*

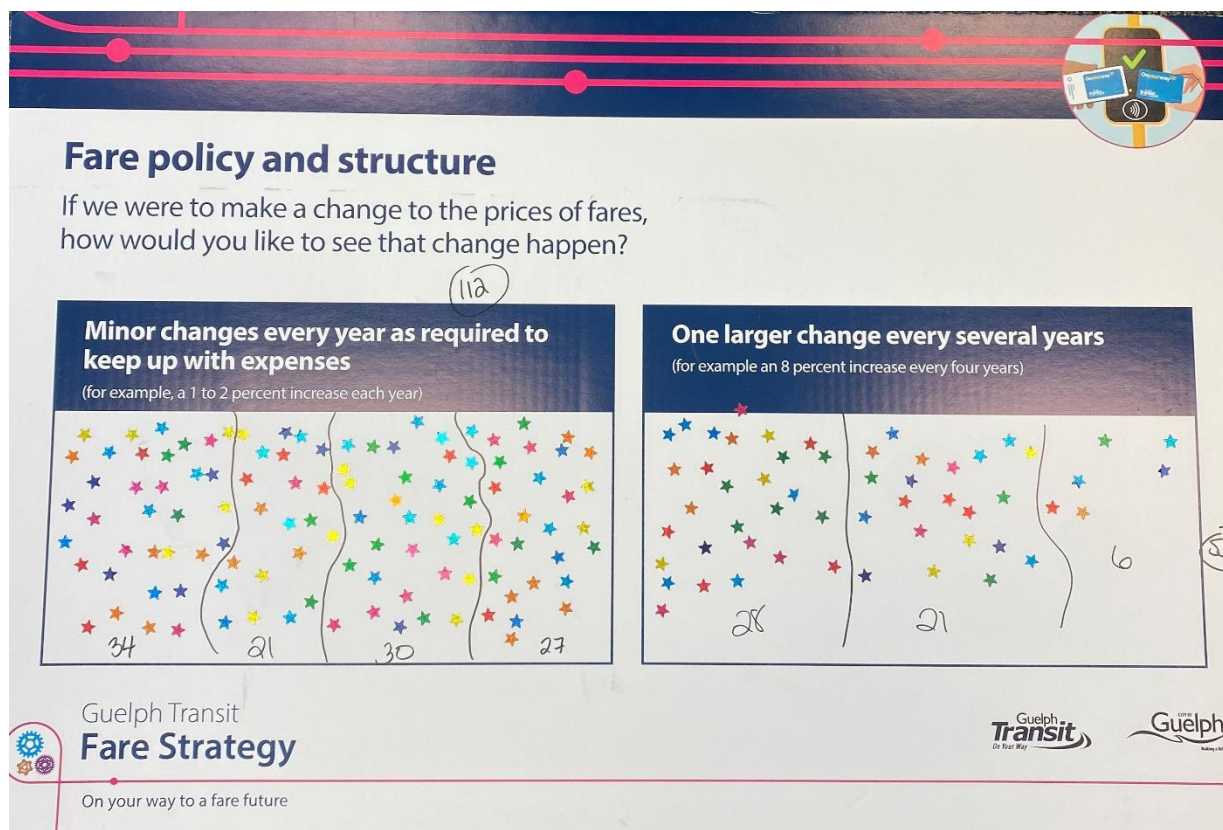
The fare pricing options intercept board asked participants what options they would like to have when paying on the bus in the future. 47 people said cash, 137 said OnYourWay card, 47 said mobile app, and 113 said tap to pay using debit, credit, android pay, or apply pay.



**Figure 56. Image of the fare pricing options intercept board.**

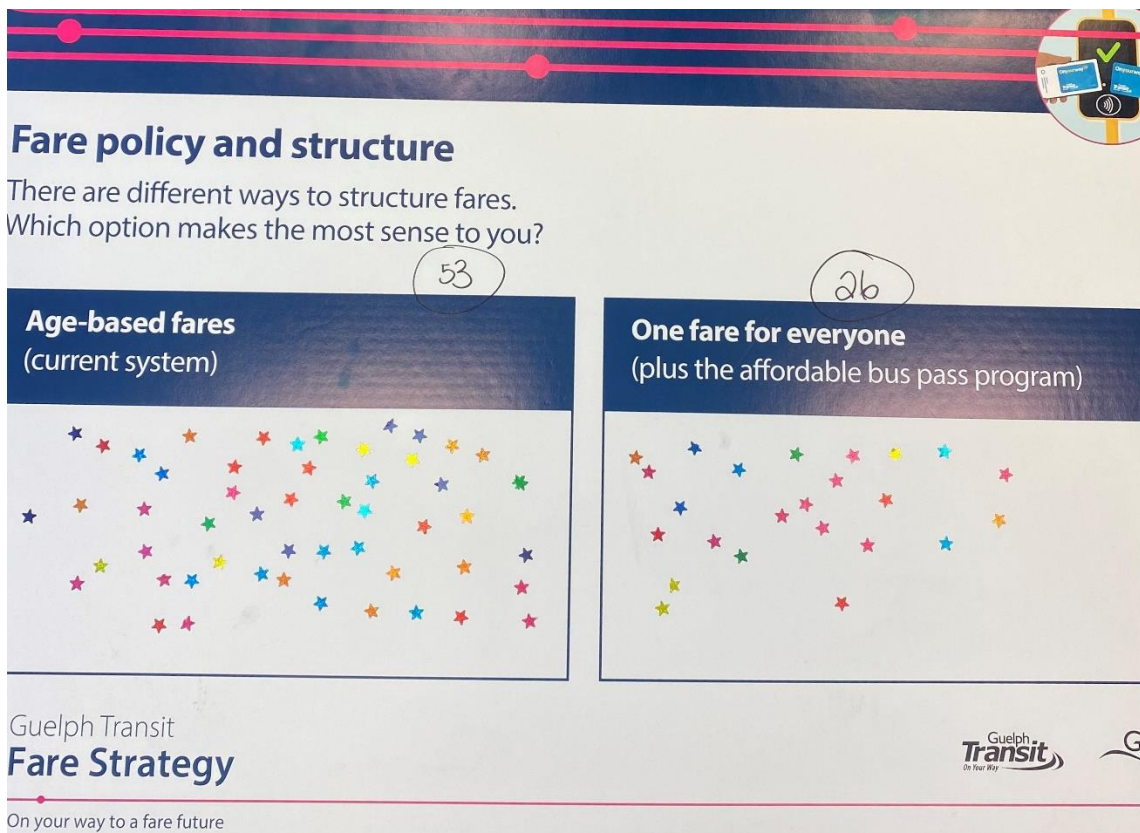
### ***Fare policy and structure***

There were two fare policy and structure intercept boards. The first asked participants how they would like to see changes made to fares. 112 people said they prefer minor changes every year as required to keep up with expenses while 55 people said they would prefer one larger change every several years.



**Figure 57. Image of the fare policy and structure intercept board that asks about fare changes.**

The second fare policy and structure intercept board asked participants what kind of fare structure makes the most sense to them. 53 people said age-based fares, which is the current system, and 26 people said one fare for everyone, plus the affordable bus pass program, which is also known as income-based fares.

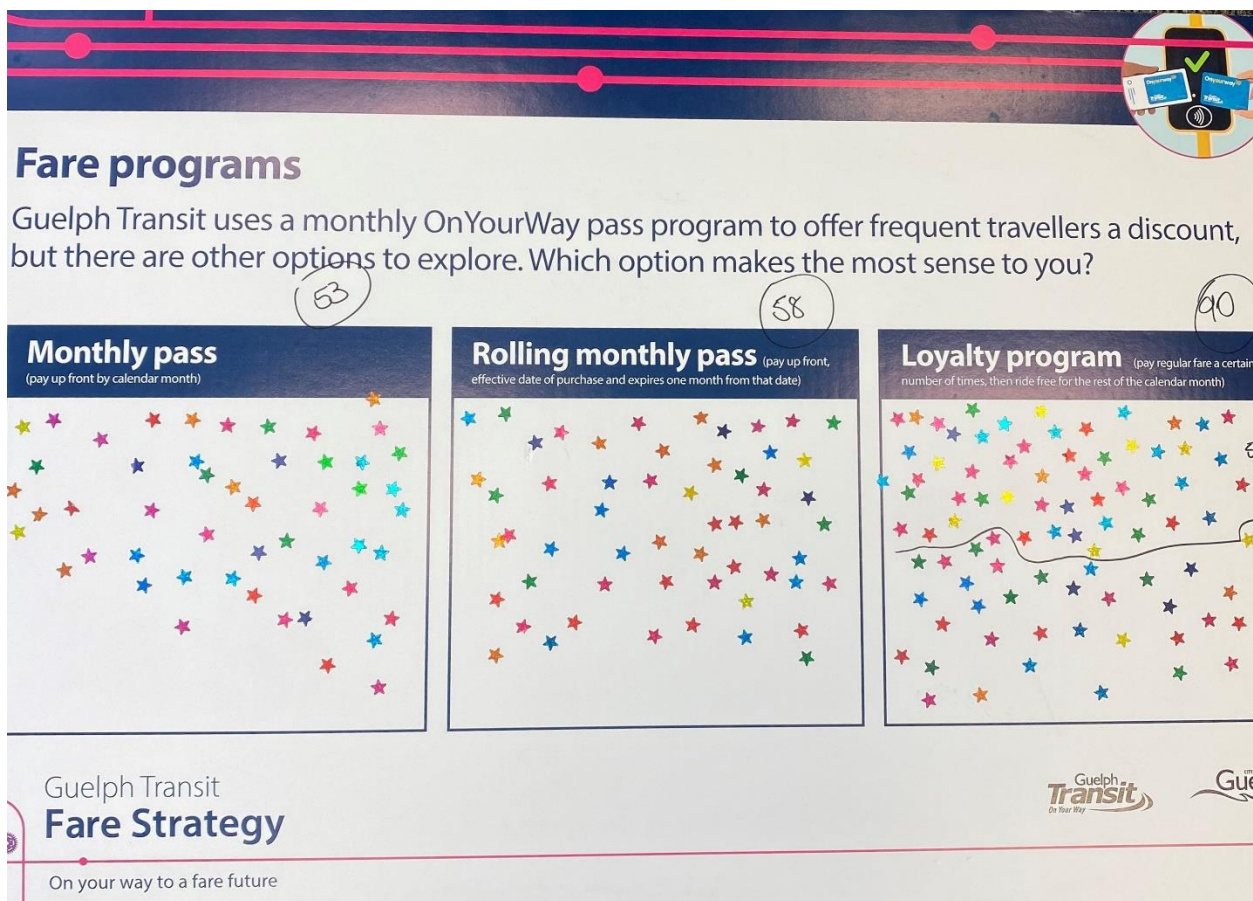


**Figure 58. Image of the fare policy and structure intercept board that asks about fare structure.**

### ***Fare programs***

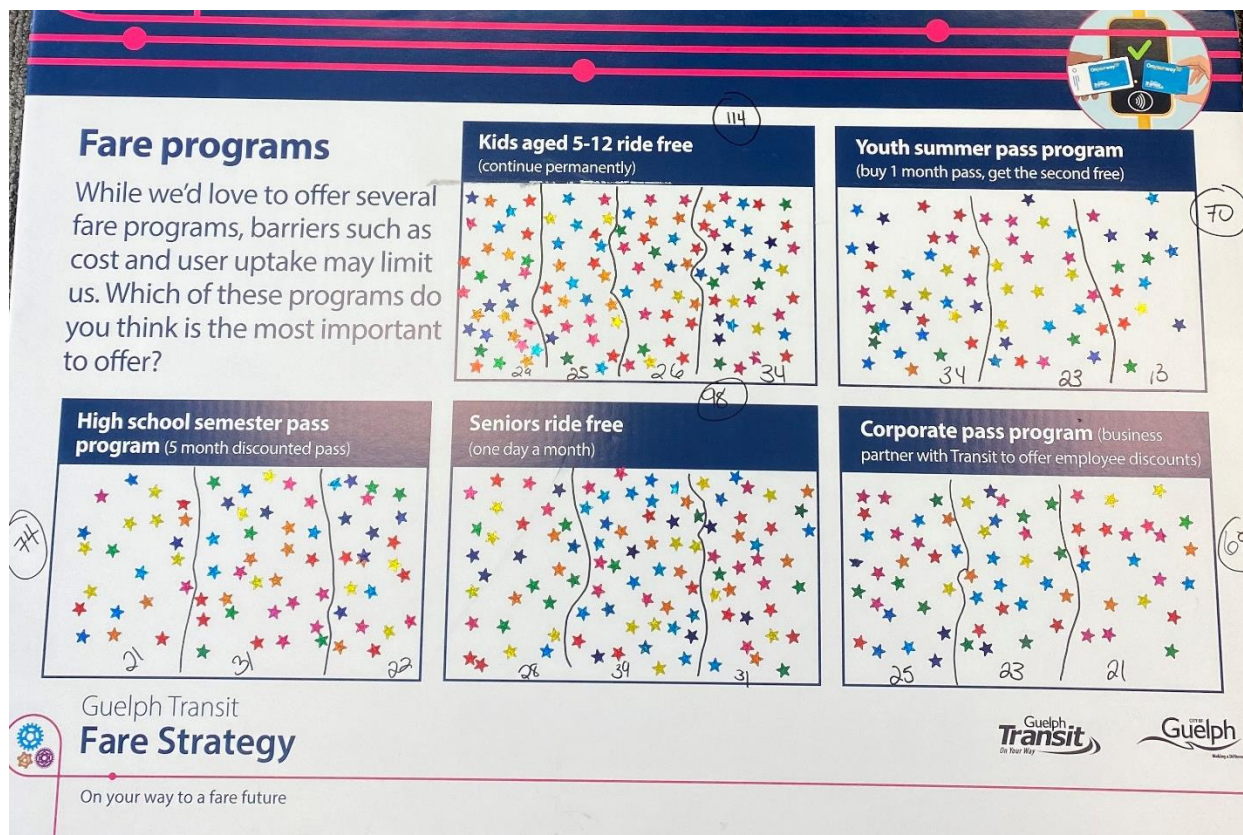
There were two fare programs intercept boards. The first asked participants about what kind of monthly pass they would prefer. 53 people said they prefer the current monthly pass where they pay up front for the whole calendar month. 58 people said they prefer a rolling monthly pass where they pay up front for a pass that expires one month from the date of purchase. 90 people said they prefer a loyalty program where they pay a regular fare every time they get on the bus and after paying a set number of times, they ride free for the rest of the calendar month.





**Figure 59. Image of the fare programs intercept board that asks about monthly passes.**

The second fare programs intercept board asked participants which discounted fare programs they believe are the most important to offer. 114 people said kids aged 5-12 ride free permanently. 70 people said a youth summer (2 month) pass program. 74 people said a high school semester (5 month) pass program. 98 people said seniors ride free one day a month. 69 people said a Corporate Pass program where businesses partner with Transit to offer discounted passes to employees.



**Figure 60. Image of the fare programs intercept board that asks about discounted fare program offerings.**

### Feedback and comments

At the open houses, community members had the opportunity to talk with staff about the Fare Strategy, which resulted in additional comments and feedback being collected.

Four participants mentioned that seniors should ride free once a week rather than once a month. Similarly, 2 participants said seniors should ride free on weekdays during the midday period (10 a.m. to 3 p.m.). Another 2 participants were in favour of a loyalty program, but believed it should be 'ride ten times, get one ride free.' Two participants wanted the free rides to Guelph Storm hockey games at the Sleeman Centre reintroduced, which has been reinstated for the 2022-2023 season. One participant was in favour of continuing the Kids Ride Free program permanently but believed it should be for kids aged 17 and under. Another participant was in favour of corporate sponsorships to fund ride free programs but suggested that buses or stops be named after companies. One participant suggested having ride free days for everyone to encourage new riders to try taking transit and another participant mentioned that transfers should be longer than 60 minutes.

## 4.4 Virtual workshops

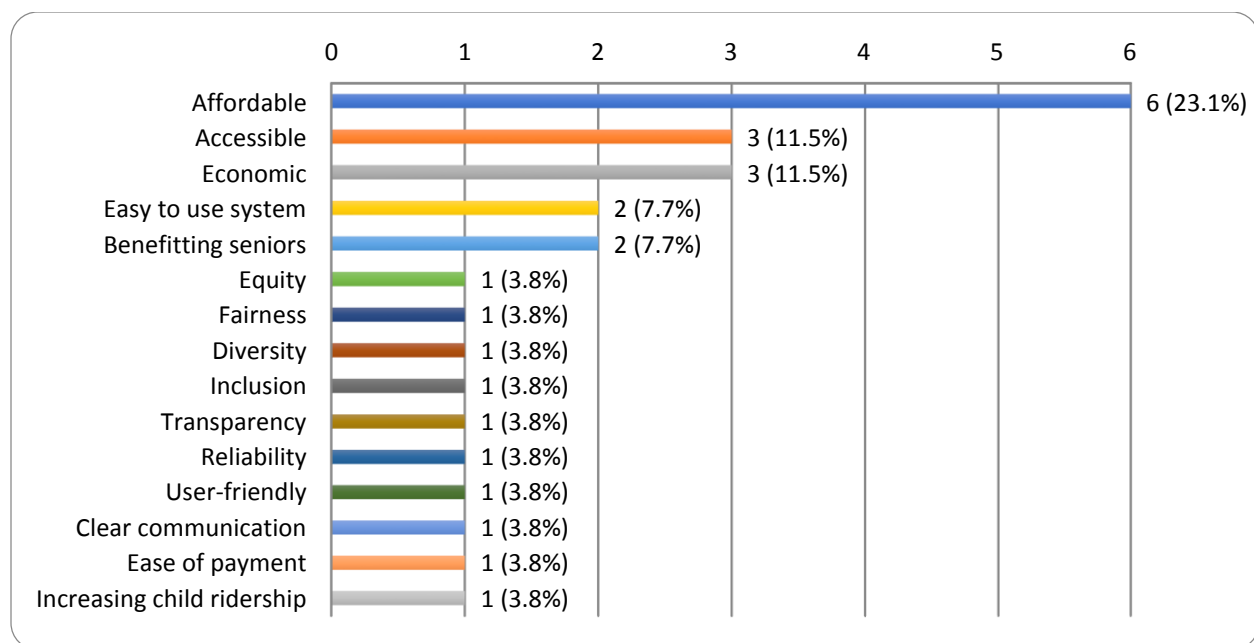
### Mentimeter results

Results from all three workshops were combined for analysis.

#### Question 1

Participants were asked what goals should be included in the Fare Strategy and could provide more than one answer. Responses that were unrelated to the Fare Strategy have been excluded.

23.1% of participants said affordability should be a goal of the Fare Strategy. 11.5% said accessibility should be a goal and another 11.5% said it should be economic. 7.7% said the fare system should be easy to use and another 7.7% said it should benefit seniors. 3.8% each said the goals should include equity, fairness, diversity, inclusion, transparency, reliability, user-friendly, clear communication, ease of payment, and increasing child ridership.



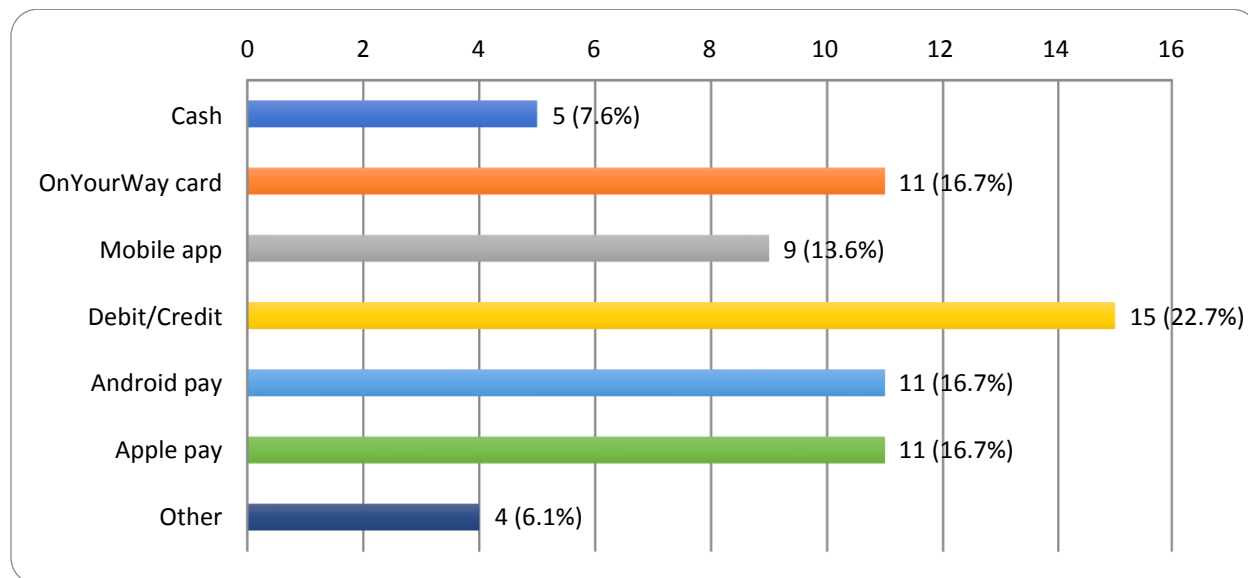
**Figure 61. What should the goals for the Transit Fare Strategy include?**

#### Question 2

Participants were asked how they would like to pay on the bus in the future and were able to select multiple options. 22.7% of participants said they would like to pay using a debit or credit card and 16.7% said they would like to pay using their OnYourWay card. Additionally, 16.7% said they would like to pay using Android Pay and another 16.7% said they would like to pay using Apply Pay. 13.6% said they would like to pay using the mobile app



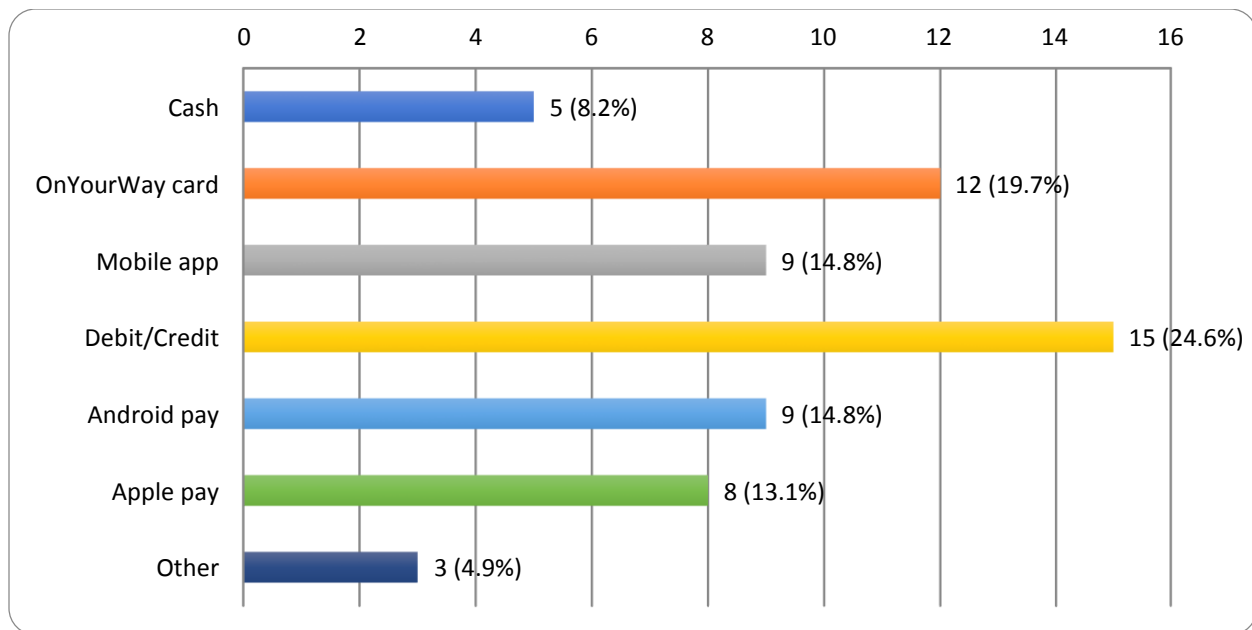
and 7.6% said they would like to pay using cash. The remaining 6.1% said they would like to pay using another method of payment.



**Figure 62. When paying on the bus, how would you like to pay in the future?**

### **Question 3**

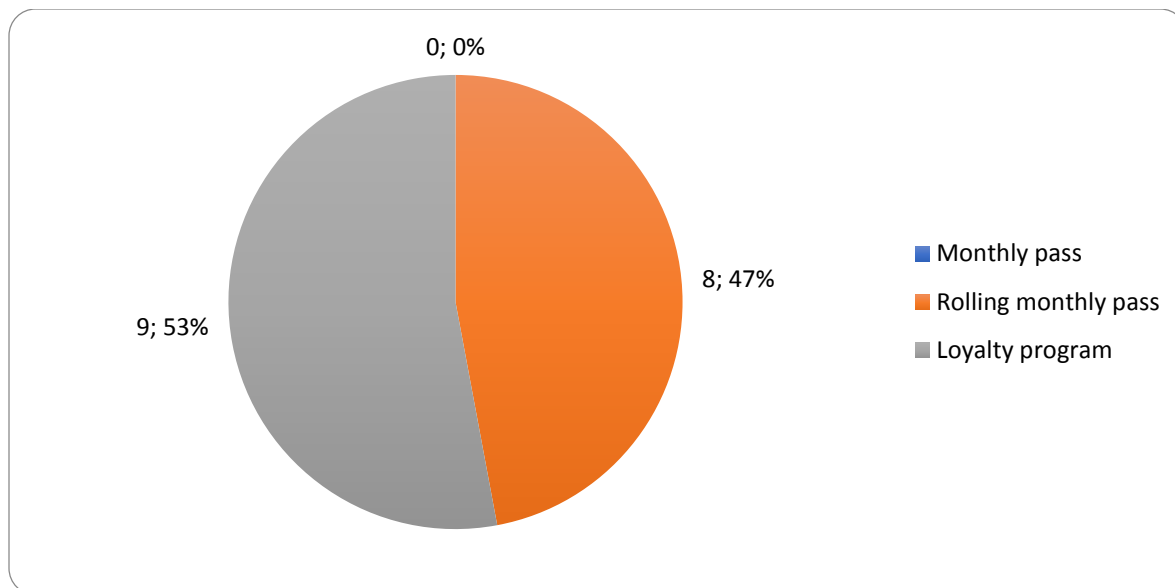
Participants were told that there may be an additional fee for paying with debit card, credit card, Android Pay and Apple Pay. They were then asked to answer the same question to see if their desired payment choices had changed. This time around, 24.6% of participants said they would like to pay using a debit or credit card and 19.7% said they would like to pay using their OnYourWay card. Additionally, 14.8% said they would like to pay using Android Pay and another 13.1% said they would like to pay using Apple Pay. 14.8% said they would like to pay using the mobile app and 8.2% said they would like to pay using cash. The remaining 4.9% said they would like to pay using another method of payment.



**Figure 63. Let's try this again. Has anything changed? How would you like to pay on the bus in the future?**

#### **Question 4**

Participants were told about the three types of frequent rider programs Guelph Transit is looking into and were then asked which program they felt makes the most sense for Guelph. 52.9% of participants said a loyalty program where free rides are given after paying for a certain number of rides each month is the best fit for Guelph. 47.1% said a rolling monthly pass where the monthly pass becomes effective on the date of purchase makes the most sense for Guelph. None of the participants felt that the current monthly pass that is active for a full calendar month is the best fit for Guelph.



**Figure 64. Which frequent rider program makes the most sense for Guelph?**

### **Question 5**

Four different fare programs were explained to participants, then they were asked to rank the programs based on which programs are the most and least important to them, with 1 being most important and 4 being least important.

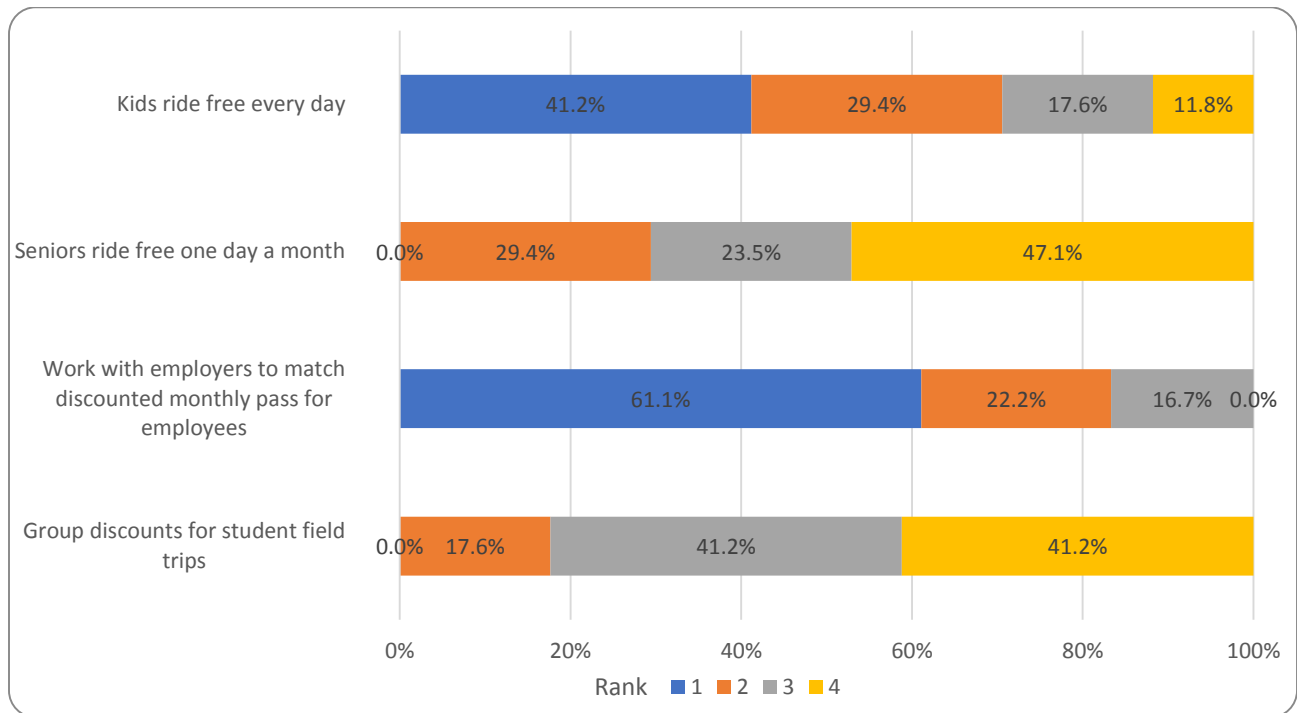
When asked to rank the Kids Ride Free program where kids aged 12 and under would ride for free every day, 41.2% of participants ranked this program number 1. 29.4% ranked the Kids Ride Free program number 2, 17.6% ranked this program number 3, and 11.8% ranked this program number 4.

Participants were asked to rank the Seniors Ride Free program as well in which one day a month, aligning with a seniors' discount day, seniors could ride free. 0% of participants ranked this program number 1, but 29.4% ranked this program number 2. 23.5% ranked the Seniors Ride Free program as number 3 and 47.1% ranked this program as number 4.

The Corporate Pass program, where Guelph Transit works with employers to match discounted monthly passes for employees, was ranked number 1 by 61.1% of participants. 22.2% of participants ranked the Corporate Pass program number 2, and 16.7% ranked this program number 3. None of the participants ranked this program number 4.

A program offering schools group discounts for student field trips was not ranked number 1 by any participants. 17.2% of participants ranked this

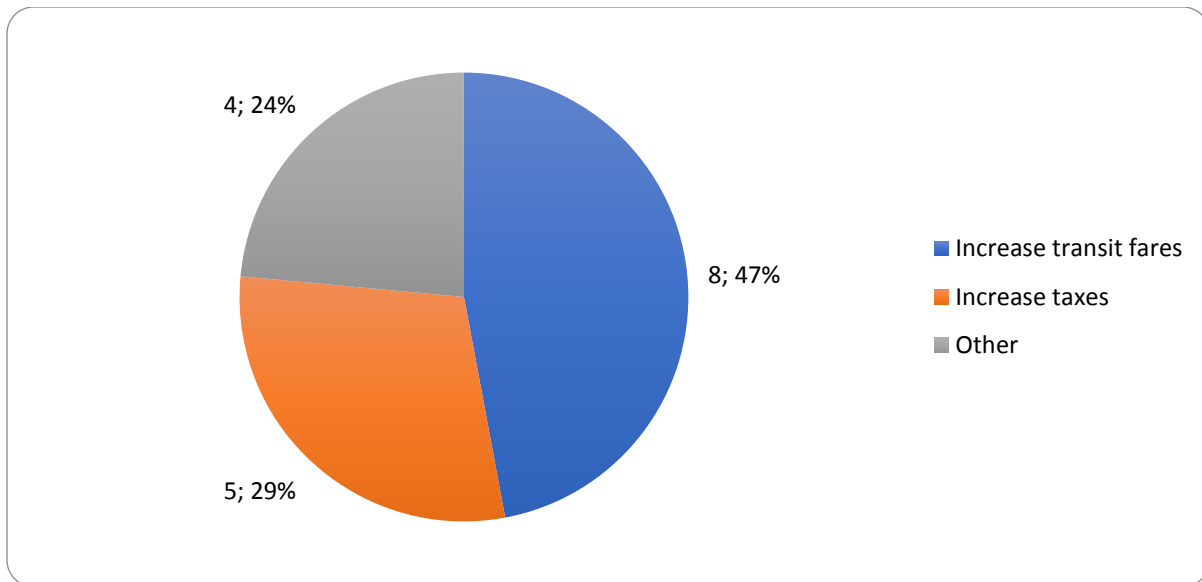
program number 2. 41.2% ranked this program number 3, and another 41.2% ranked this program number 4.



**Figure 65. Rank these discounted programs in order of preference.**

### **Question 6**

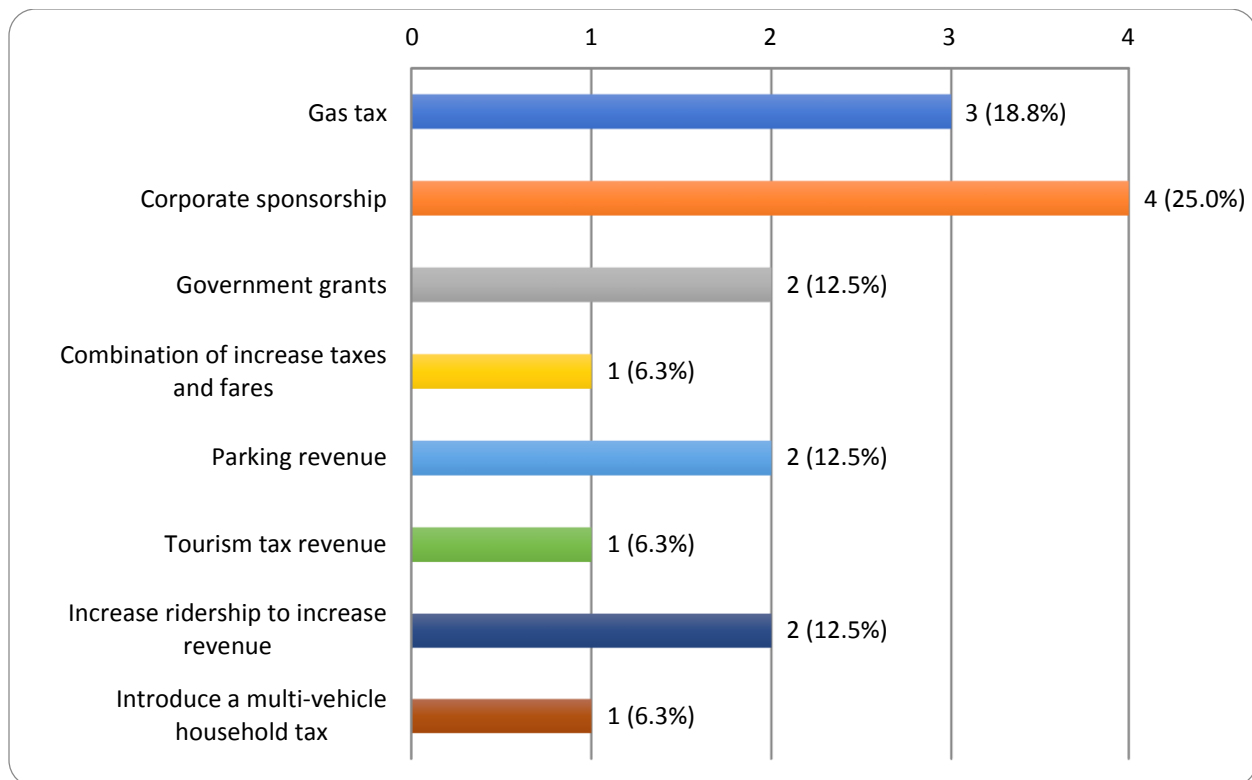
It was explained to participants that discounted and free fare programs must be paid for in some way. They were then asked how these programs should be funded. 47.1% of participants said transit fares should be increased to fund free and discounted fare programs while 29.4% said taxes should be increased to fund these programs instead. Another 23.5% said other methods of funding these programs should be considered.



**Figure 66. Which kind of funding should we explore to cover costs of free and discounted fares?**

***Question 7***

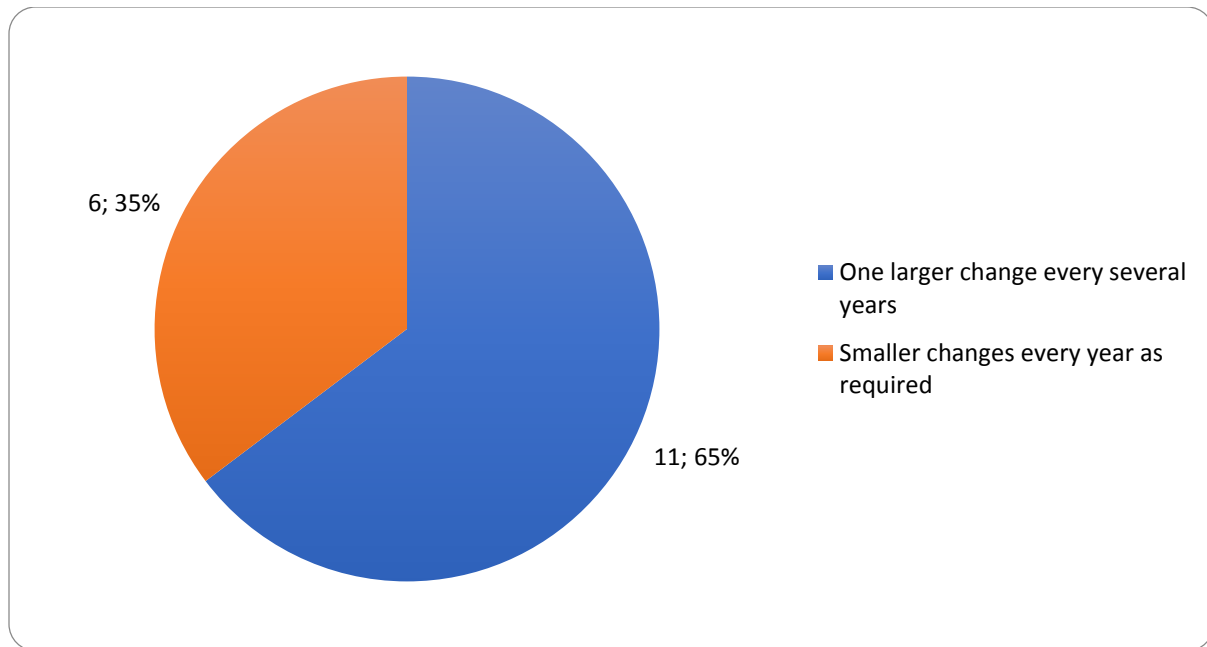
All participants were asked to brainstorm other ideas of funding free and discounted fare programs. 25.0% of participants said Guelph Transit should investigate corporate sponsorships and 18.8% said to explore using Gas Tax funding. 12.5% said to explore government grant opportunities, another 12.5% said to investigate using parking revenue, and an additional 12.5% said to find ways to increase ridership in order to increase revenue. 6.3% said to explore using a combination of increasing taxes and increasing fares to fund these programs, an additional 6.3% said to investigate using tourism tax revenue, and another 6.3% said the City should explore introducing a tax on multi-vehicle households so Transit can use the revenue.



**Figure 67. Are there other funding models we should explore?**

### **Question 8**

It was explained to participants that changes to fares would likely need to happen at some point in time. They were then asked how they would like to see changes to fares happen. 64.7% of participants said they would prefer to have one larger change every several years while 35.3% said they would prefer smaller changes every year as required.



**Figure 68. How would you like to see changes to transit fares happen?**

### **Questions and comments**

After the information was presented at the virtual workshops and during the interactive sessions, there were several questions and comments from participants. The questions and comments have been organized into the following categories: payment methods, fare programs, methods of funding, and fare pricing.

#### ***Payment methods***

- Questions regarding how much the additional fee would be when using debit, credit, Android pay, or Apple pay
- Support for maintaining cash as a payment option
- Interest in universal cashless methods for visitors who do not have an OnYourWay card
- Interest in kiosks to buy and print single use tickets and day passes

#### ***Fare programs***

- Questions regarding eligibility for Kids Ride Free program
- Interest in continuing sponsored fare program that offers free rides to Guelph Storm hockey games for ticket holders
- Interest in combined Corporate Pass program for Downtown Guelph Business Association
- Support for making the Affordable Bus Pass pilot program permanent

- Support for making the Kids Ride Free program permanent to encourage transit ridership at an early age
- General interest in incentivizing transit use among adults to help with traffic and air pollution

### ***Methods of funding***

- Support for funding via a combination of increasing taxes and increasing fares
- Interest in using parking revenue to fund transit
- Support for everyone paying for transit, not just those who use it

### ***Fare pricing***

- Concerns over future fare increases not being explained well enough to the public
- Support for having a mixed approach to fare increases of some smaller and some larger changes
- Concerns that waiting for four years to make a large increase may cause budgeting issues for some
- Concerns that smaller increases make it more difficult if paying cash (i.e., its easier to add a quarter than a nickel or dime)

## **5. Conclusions**

Based on the feedback received, the existing fare structure, programs, policies, and pricing were reviewed to better meet the needs of the public and address areas of concern. The outcomes of this review resulted in the recommendations in this report.



# Transit Fare Strategy

**Presented by Guelph Transit**

# Fare Strategy Recommendations

- Fare Policies
  - OnYourWay fare cards
  - Transfers
  - Bus bay rentals
  - Bus charters
  - Financial performance indicators
- Fare Programs
  - Kids Ride Free program
  - Corporate Pass program
  - Travel Training program
  - City of Guelph Employee Pass program
  - TaxiSCRIP program
  - Fare Capping Loyalty program

# Fare Capping

- Fare equity
- Ensure best value fare products available to all riders
- Reduced upfront cost
- Only paying for services received
- Enhanced customer experience
- Administrative time savings

# Fare Strategy Recommendations

- Payment Options
  - Self-service terminals
  - Debit and credit fare payment
- Fare structure and pricing
  - Fare structure
  - Fare pricing
  - Fare pricing methodology

# Fare Pricing

Fare Media	Category	Comparator Average	Current Fare	Proposed Fare	Fare Increase per cent
Cash	Cash	\$3.30	\$3.00	<b>\$3.25</b>	8.3 per cent
Rides	Adult	\$2.75	\$2.80	<b>\$2.80</b>	0 per cent
	Youth	\$2.30	\$2.25	<b>\$2.25</b>	0 per cent
	Senior	\$2.25	\$2.25	<b>\$2.25</b>	0 per cent
Monthly Pass	Adult	\$93.17	\$80.00	<b>\$95.20</b>	19 per cent
	Youth	\$67.30	\$68.00	<b>\$76.50</b>	12.5 per cent
	Senior	\$59.00	\$68.00	<b>\$76.50</b>	12.5 per cent

# Financial Impacts

Revenue	<u>2023</u>	<u>2024</u>	<u>2025</u>	<u>2026</u>	<u>2027</u>
Fare Changes	\$5,200	\$ 10,200	\$ 52,100	\$ 121,500	\$ 51,500
Corp Pass		\$ 18,700	\$ 1,600	\$ 400	\$ 500
Bus Bay Rental		\$ 3,600	\$ 600	\$ 600	\$ 600
Charter		\$ 2,500	\$ 1,500	\$ 1,500	\$ 1,500
Kids Ride Free Program (revenue reduction)		\$ (117,000)			
<b>Total</b>	<b>\$5,200</b>	<b>(\$82,000)</b>	<b>\$55,800</b>	<b>\$124,000</b>	<b>\$54,100</b>

Expense	<u>2023</u>	<u>2024</u>	<u>2025</u>	<u>2026</u>	<u>2027</u>
Kids Ride Free (program support)		\$38,100			
Operating Impacts from Capital		\$2,900	\$30,100	\$2,100	\$2,200
<b>Total</b>	<b>-</b>	<b>\$41,000</b>	<b>\$30,100</b>	<b>\$2,100</b>	<b>\$2,200</b>

# Transit Fare Strategy

## Discussion