



U-Pass Toolkit

The complete guide to universal transit pass programs
at Canadian colleges and universities

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Prepared by
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Chapter 1: Introduction

1.1 The challenges of campus transportation

Canadian universities and colleges are facing unprecedented financial and competitive pressures. At the same time, many are also tackling the difficult challenge of making their campuses more sustainable. Sustainability is essential to preserving our quality of life. And a new approach to campus transportation—how students and staff get around—is a prerequisite to sustainability.

Campuses across North America—both new and old, suburban and downtown, lower and higher density—are grappling with major transportation challenges. Growing enrolments are putting pressure on campus roads, parking lots and transit services. Greater car ownership among young people has made driving to school an option for many students, something much less common when today's campuses were first planned. In short, we need to house more people on campus, and more of them want to bring their cars along.

One possible solution—building more parking lots—is frequently unpalatable, if not impossible. Parking lots take up a lot of room, are very expensive, and rarely pay for themselves. In fact, when many institutions look closely at how they use their lands, they decide to replace parking lots with more valuable research, teaching or residence facilities. Colleges and universities are looking to innovative transportation demand management strategies to help staff and students leave their cars at home, in favour of more sustainable travel options like walking, cycling and public transit.

1.2 The U-Pass response

Public transit is a vital part of a financially, socially and environmentally sustainable solution to campus transportation challenges. Most Canadian campuses are natural focal points for transit service—they bring together thousands of people with active lives, irregular schedules and financial priorities that often place tuition, books, rent and food ahead of car ownership. Canadian transit systems have responded by supporting the travel needs of university students. In most cities, but particularly smaller ones, students are a major transit market.

As with virtually all transit markets, however, the cost of serving students exceeds the resulting revenue. While major improvements to campus transit services are desirable, they are often unaffordable for transit systems. Over the last two decades, huge decreases in provincial and federal transit funding have been accompanied by growing pressure on local government budgets. Service cuts and fare increases are now the rule, rather than the exception. Canada's public transit systems, like its universities and colleges, are under great strain.

In response to these challenges, transit systems are looking for low-cost ways to attract new riders without abandoning traditional markets. One popular strategy is the creation of new fare structures to serve the needs of specific markets. New technologies like magnetically encoded cards and electronic “smart cards” make this possible, by enabling a wide range of customized fares without requiring bus drivers to monitor all kinds of special tickets, tokens and cash payments.

Not surprisingly, Canada’s post-secondary students—who have an interest in overcoming the challenges faced by both education and public transit—are helping out. More and more, they are putting their creativity and initiative to work in proposing, negotiating and implementing a program known as the **universal transit pass**, or **U-Pass**. Student awareness of U-Pass programs has been growing for several years, helped along by the Internet and communication among student associations and other campus groups.

Here is how U-Passes work. All students or members of a student group (such as full-time undergraduates) pay a fee that gives them unlimited access to transit for the entire semester, school year or calendar year. The U-Pass fee is typically much lower than the cost of buying regular passes or tickets, because the cost of transit fares is redistributed from a smaller group to a larger one. U-Pass programs, being universal by nature, involve mandatory participation that makes them similar to public health or pension plans. While some individuals may benefit more directly than others, U-Passes work because they have substantial benefits for the student group as a whole.

From a transit system’s perspective, U-Passes should be “revenue neutral” (or, more precisely, “net revenue neutral”). That is, any changes in transit revenues and costs arising from the U-Pass should cancel each other out. As a rough guideline, if $x\%$ of students ride transit to campus then the monthly cost of a U-Pass will be equivalent to at least $x\%$ of the monthly transit fares paid by the average student rider. Typically, however, the U-Pass fee is set higher and the additional revenue is used to finance new routes, extend schedules or increase the frequency of service.

U-Passes are typically (but not always) limited to the student population. While some staff and faculty may be interested in the concept, the idea of a universal program can usually be approached only in the context of their collective agreements. Transit systems may also be reluctant to extend the U-Pass to college or university employees, in order to avoid confusion with other programs that promote discounted transit pass sales in the workplace. An exception to this rule occurs at Calgary’s Southern Alberta Institute of Technology, where college staff and faculty have been included in the U-Pass program.

1.3 U-Pass benefits

U-Pass programs are “win-win”—that is, they benefit students, the institution, the transit system, and the community at large. **Exhibit 1** shows some of the U-Pass benefits that have been observed at Canadian universities and colleges.

EXHIBIT 1 U-Pass benefits	
For students	For the transit system
<ul style="list-style-type: none"> ▪ Creates an attractive, convenient travel option (transit use typically grows by 50% or more) ▪ Reduces transportation costs (\$10 to \$20 monthly for U-Pass, versus \$50 to \$60 for regular fares) ▪ U-Pass revenues pay for improved transit services designed to meet student needs ▪ Makes it easier to live in more distant, lower-cost neighbourhoods ▪ Makes it easier for occasional users (e.g. students in residence) to run errands or explore the area ▪ Offers a safe and reliable travel option for those who consume alcohol 	<ul style="list-style-type: none"> ▪ Ridership grows on poor-performing evening and mid-day routes ▪ Ridership gains help maximize the use of buses ▪ Fewer complaints from public about empty buses ▪ Transit unions pleased by additional work ▪ Politicians and public see a more important role for transit ▪ Students more likely to use transit after they graduate
For the institution	For the community
<ul style="list-style-type: none"> ▪ Supports overall objectives to reduce auto travel and air pollution on campus ▪ Reduces pressure on parking facilities ▪ Enables use of land for buildings or greenspace, rather than parking 	<ul style="list-style-type: none"> ▪ Lower traffic volumes and air emissions ▪ Less illegal parking in residential areas around campus ▪ Improved transit services benefit other (non-student) users

1.4 U-Pass challenges

Despite all their benefits, U-Passes are not always easy to implement. The challenges can be diverse, and they vary from one situation to another. Every U-Pass story involves different hurdles, and different ways of overcoming them. The main implementation challenges are summarized in the following paragraphs.

Building a mutual understanding. Student groups, transit systems and (where involved) the school’s administration need to understand each other’s interests and limitations. What does each party want out of the deal? Their objectives should be clearly defined—for example, “revenue neutral” can mean different things to different people.

Getting students on board. Students who live on or near campus, and those who drive to school, often oppose U-Passes because they see few direct benefits in exchange for the cost. Building support among these groups can be difficult, but is necessary to win a referendum on U-Pass implementation. Even students who favour the idea of a U-Pass may oppose a specific proposal because it is not quite right for them. It may be particularly difficult to achieve support from a majority of students when the transit system already sells monthly or semester transit passes to post-secondary students at a large discount, thus reducing the financial incentive for transit users to fight for a U-Pass. Similarly, it can be harder to get a majority of students on board when transit ridership is already high, making the cost of a revenue-neutral U-Pass seriously unattractive to non-transit riders.

Getting the administration on board. Administrators may be concerned that higher student fees, especially those with no “opt out” provision, will discourage students from applying to the school. They may also express concern about collecting fees for a “third party.”

Getting the transit system on board. In the face of dwindling resources and chronic understaffing, some transit systems may be reluctant to introduce a new fare program with all the work it entails. Others are likely to be concerned about addressing the possible growth in student ridership in a way that balances U-Pass revenues and costs, while keeping up with student expectations for service improvements.

Negotiating a contract. The U-Pass is a financial partnership among two or more organizations. Like all negotiations, the creation of a U-Pass agreement that everyone can live with requires flexibility and determination from everyone at the negotiating table. Successful U-Pass programs inevitably require compromise and a level of trust among key groups.

Timing a referendum. U-Pass referendums are usually held at the same time as student elections, in order to maximize turnout and reduce costs—but this opportunity comes only once a year. The need for administrative approval (where required) can consume some of the limited time before U-Pass implementation the following September.

Working out the details. U-Passes involve lots of decisions. What will the actual pass look like? How will it be distributed? What is the best way to tell students about it? Who, if anyone, should be exempt from paying the fee?

Doing the legwork. A new U-Pass program represents a substantial time commitment from the student association for both planning and implementation. The months preceding and following the program launch are particularly busy, and may require hiring temporary staff for tasks like distribution and communications.

Providing transit service. U-Passes are not “business as usual” for transit systems. Jumps in campus ridership of 50% or more are common, and fleet size limitations can require the transit system to juggle priorities until additional buses can be acquired (note that new buses cost about four hundred thousand dollars, and typically require a year or more to deliver). It is also difficult to guarantee future transit service levels because transit systems are, ultimately, at the mercy of the governments that subsidize them.

Maintaining a solid relationship. U-Pass programs are dynamic, and require ongoing effort. Annual student association elections can bring new issues and perspectives. Campus transit services may be adjusted to better serve off-campus markets, or to meet financial realities. Some students may see U-Pass fee increases, needed to pay for new services, as a “cash grab” by the transit system.

Chapter 2: The basics

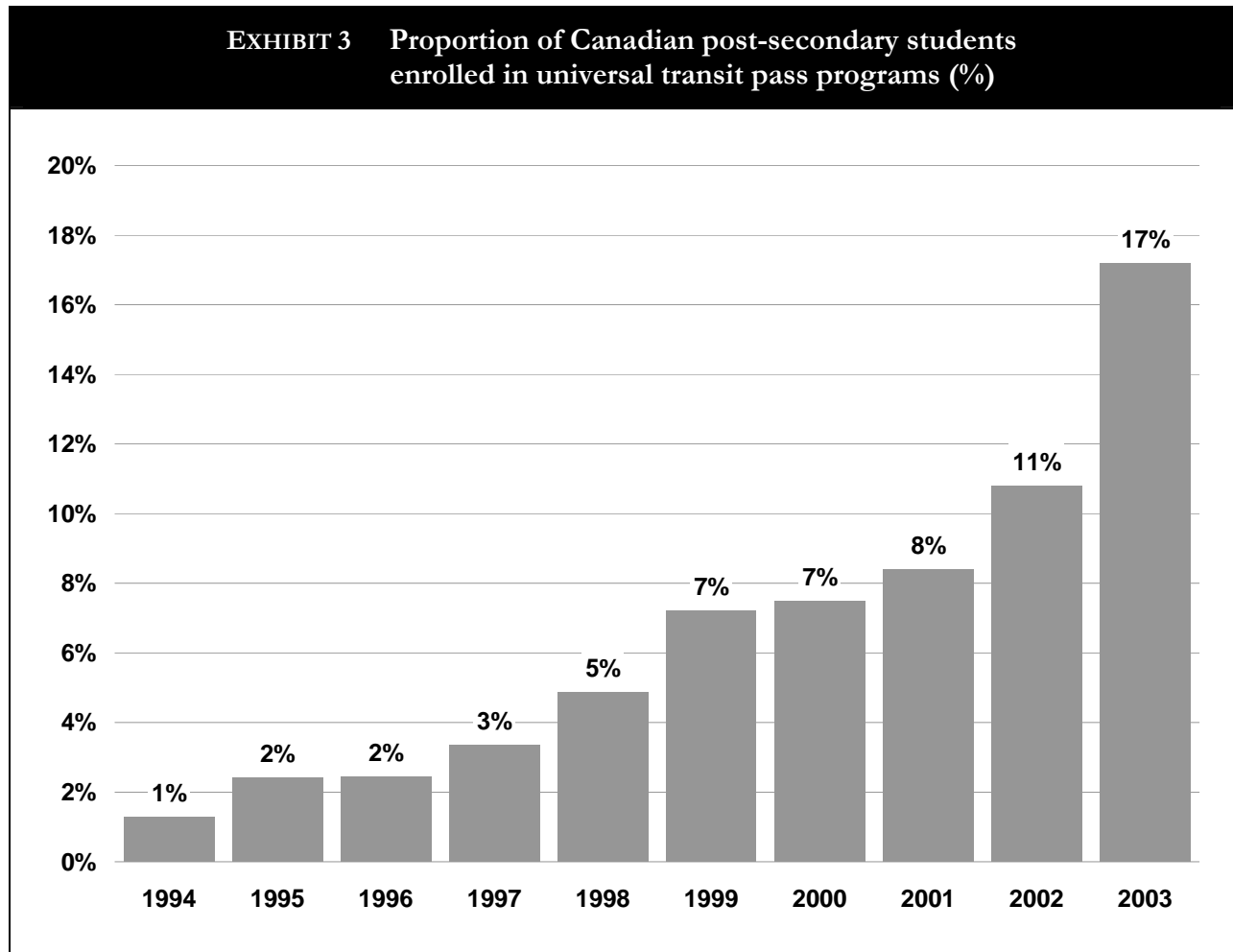
2.1 Where is it happening?

Dozens of North American colleges and universities have universal transit pass programs, and in Canada U-Passes are in place at over 20 institutions in 12 communities (see **Exhibit 2**).

EXHIBIT 2 Universal transit pass programs in Canada	
Community and transit system(s)	Institution(s) and start date(s)
Calgary, Alta. Calgary Transit	<ul style="list-style-type: none"> ▪ University of Calgary (2002) ▪ Southern Alberta Institute of Technology (2001) ▪ Bow Valley College (2003) ▪ Nazarene University (2003) ▪ Alberta College of Art and Design (2004)
Guelph, Ont. Guelph Transit	<ul style="list-style-type: none"> ▪ University of Guelph (1995)
Halifax, N.S. Metro Transit	<ul style="list-style-type: none"> ▪ Saint Mary's University* (2003)
Hamilton, Ont. Hamilton Street Railway	<ul style="list-style-type: none"> ▪ McMaster University (1997)
Kamloops, B.C. BC Transit	<ul style="list-style-type: none"> ▪ University College of the Cariboo (2004)
Kingston, Ont. Kingston Transit	<ul style="list-style-type: none"> ▪ Queen's University (1970s) ▪ St. Lawrence College (1995)
London, Ont. London Transit Commission	<ul style="list-style-type: none"> ▪ University of Western Ontario* (1998) ▪ Fanshawe College (1999)
North Bay, Ont. North Bay Transit	<ul style="list-style-type: none"> ▪ Nipissing University (1998) ▪ Canadore College (1998)
Peterborough, Ont. Peterborough Transit	<ul style="list-style-type: none"> ▪ Trent University (1984)
St. Catharines, Ont. St. Catharines Transit, Niagara Falls Transit, Welland Transit, Coach Canada	<ul style="list-style-type: none"> ▪ Brock University (2003)
Vancouver, B.C. TransLink	<ul style="list-style-type: none"> ▪ University of British Columbia (2003) ▪ Simon Fraser University (2003)
Victoria, B.C. BC Transit	<ul style="list-style-type: none"> ▪ University of Victoria* (1999) ▪ Camosun College (1999)




** Appendices C through E contain detailed case studies of these three programs*

Exhibit 3 shows how the proportion of Canadian college and university students enrolled in universal transit pass programs has grown over the last decade.



2.2 What's involved? How long does it take?

Exhibit 4 summarizes the typical phases and tasks involved in developing a U-Pass program, and the length of time that they typically require.

EXHIBIT 4 U-Pass program development		
Phases	Main tasks	Typical duration & timing
 <p>Phase 1</p>	<p>Planning</p> <ul style="list-style-type: none"> ▪ Initial discussion between student association and transit system ▪ Survey of student travel patterns and preferences ▪ Negotiation of key terms 	<ul style="list-style-type: none"> ▪ 6 to 12 months ▪ Fall is a good time for a student survey ▪ Discussions may last years before agreement is reached on key terms
 <p>Phase 2</p>	<p>Buy-in</p> <ul style="list-style-type: none"> ▪ Awareness and momentum building ▪ Student referendum ▪ Administrative approval (if needed) 	<ul style="list-style-type: none"> ▪ 2 to 3 months per task ▪ Referendum is usually concurrent with student elections (February/March)
 <p>Phase 3</p>	<p>Implementation</p> <ul style="list-style-type: none"> ▪ Detailed development ▪ Contract signing ▪ Program launch ▪ Monitoring ▪ Review and renewal 	<ul style="list-style-type: none"> ▪ 3 to 6 months from buy-in to launch ▪ September is the best time for program launch ▪ Monitoring, review and renewal are ongoing

2.3 Who does what?

The essential participants in a U-Pass program are the student association and the transit system. The university or college administration will also play an important but minor role, and interest groups can also participate.

Student association. As a principal party to the U-Pass contract, and as the day-to-day U-Pass administrator, the student association must play a leading role in shaping the program. Note that while it is helpful for the student association to be an active champion of the U-Pass, it is not strictly necessary (for more on this, see Section 4.1). The main roles of the student association include:

- Representing the interests of students, both from financial and transportation perspectives, during negotiation of the U-Pass agreement and related transit service improvements
- Obtaining whatever approval is required from students (usually through a referendum) to enter into a U-Pass contract with the local transit system
- Collecting U-Pass fees from students (typically via the administration) and make remittances to the transit system
- Developing program details concerning eligibility and exemptions, creation and distribution of the actual U-Pass medium (card, sticker or other as appropriate), and sanctions for abuse of privileges
- Informing students about the program's operation and conditions
- Publicizing and enforcing program rules related to abuse and fraud

Also note that the main student association may not always directly represent all students at the college or university. Graduate students, who usually have their own association, and students of affiliated schools (independent institutions located on the main campus) may also have an interest in being part of a U-Pass. Generally speaking, it is better to involve these groups earlier rather than later. They may decide not to participate, but at least they will have had the opportunity to do so.

Transit system. The local transit system is the student association’s most important partner in putting a U-Pass in place. A constructive relationship between students and transit staff is essential. Gathering information, evaluating alternatives, building student awareness and developing program details are all much easier when these two parties trust each other and work together. The main roles of the transit system include:

- Representing the interests of the local government and wider community in operating an effective and efficient transit service
- Accounting for and reporting on changes in transit ridership and the nature and costs of service adjustments
- Keeping transit vehicle operators informed as to start and end dates of U-Pass validity, and protocols for dealing with suspected abuse

Administration. The university or college administration may have a minor role in the U-Pass program. At the very least, the school usually approves the addition of a U-Pass fee to other mandatory student fees, and collects the fee on behalf of the student association. But in some instances, the administration is more involved. At the University of Victoria, for example, the school subsidizes the U-Pass fee paid to the transit system by \$4 per student, per semester—a total annual contribution of \$170,000 paid from campus parking revenues.

Interest groups. Campus interest groups with an interest in the environment, sustainable development, health, social justice or transportation can be valuable allies in shaping student opinion to support a U-Pass proposal. They can help get the word out to students, and add their own perspective on U-Pass benefits. It is important to keep these groups up-to-date, because students can be confused by conflicting information from different sources. It may help to keep a list of interested groups, and issue regular updates (even if there is no real news) to all of them at the same time.

U-Pass fact

Off-campus interest groups can also play a role in U-Pass development. At Saint Mary’s University in Halifax, the Ecology Action Centre (a non-profit organization that promotes sustainable transportation programs at employers across the city) facilitated U-Pass negotiations between the Students’ Association and Metro Transit. See Appendix E for more information.

Chapter 3: Laying the groundwork

3.1 Building partnerships

The first task in developing a U-Pass program—and one that pays long-term dividends—is to identify the key players discussed in Section 2.3, and invite them to consider becoming partners in a possible U-Pass program.

In our busy world, it can be difficult to catch the attention of multi-tasking administrators and transit managers. While a phone call adds a personal touch, an accompanying letter on student association letterhead will signify the serious intent of the communication. Addressing the letter to someone in a senior position (e.g. the transit system’s General Manager) while sending a copy of the letter to the person most likely to be the everyday contact (e.g. the Manager of Transit Planning) is another useful way to generate an interested response.

A good way to appeal to partners is by suggesting what benefits a U-Pass could give them: student groups want convenient low-cost transportation, transit systems want to build ridership and revenues, university and college administrators want to solve their transportation challenges and attract students, and campus groups want to build their profiles and move their agendas forward.

Once potential partners are “at the table,” an early objective will be to familiarize them in greater detail with the U-Pass concept: how it works, its benefits and challenges, who should be involved, and why. Invite each partner to identify whether, and how, a U-Pass would help (or hinder) them in achieving their own goals. What do they find attractive about a U-Pass, and what potential problems do they see? It might help for a neutral facilitator to lead these discussions—someone who can probe for motivations and explore possible hurdles without being perceived as pushing their own agenda.

If there seems to be broad support for exploring the idea of a U-Pass program, it might make sense to formalize the partnership as a Task Force, Working Group or Steering Committee. This group should be led by a Chair, likely the student association, or by Co-Chairs, likely the student association and transit system. Note that some potential partners (particularly school administrators) may not want to be seen as committed to a U-Pass, and may decline formal membership; however, they may wish to stay informed and even attend meetings. Any participation, however minimal, should be welcomed—if people stay informed it will be easier to get their help later on.

3.2 Gathering information

A thorough base of accurate information is essential to a successful U-Pass program, for two reasons. First, minimizing guesswork at the planning stage can maximize confidence—and everyone is more enthusiastic about a new project when they truly think it will work. Second, knowing where you started (“before”) will make it easier to know how far you have come in later years (“after”).

Exhibit 5 summarizes key information that might be needed by partners in U-Pass planning, why it is helpful, and how to get it.

EXHIBIT 5 Information for U-Pass planning		
Information	Purpose	Possible sources
Student travel habits <ul style="list-style-type: none"> ▪ Share of travel to/from campus by transit, walking, cycling, car ▪ Nature of transit use to/from campus (timing, frequency) ▪ Nature of transit use for other trips (timing, frequency, purpose, destination) 	<ul style="list-style-type: none"> ▪ “Before/after” comparisons of student travel by transit and other modes ▪ Planning transit service improvements needed to carry additional passengers 	<ul style="list-style-type: none"> ▪ Survey of students (random sample by mail or telephone is preferred) ▪ Counts of students getting on or off transit vehicles at campus stops ▪ “Load counts” on arriving and departing transit vehicles
Student transit expenditures <ul style="list-style-type: none"> ▪ How much students spend on transit ▪ What fare media (cash, tickets, passes) they use 	<ul style="list-style-type: none"> ▪ Helps set a fair U-pass fee ▪ Understand financial benefit of U-Pass to transit users 	<ul style="list-style-type: none"> ▪ Sales of tickets or passes to post-secondary students (where separate from other adult fares)
Student attitudes <ul style="list-style-type: none"> ▪ Attitude toward U-Pass idea ▪ Attitude toward possible U-Pass fee ▪ Level of concerns with various issues (parking, air quality, convenience) 	<ul style="list-style-type: none"> ▪ Understand possible support for U-Pass proposal ▪ Understand travel changes that may result from U-Pass ▪ Understand receptiveness to various U-Pass fee levels ▪ Plan effective information campaign 	<ul style="list-style-type: none"> ▪ Survey of students (random sample preferred, other types can also help) ▪ Public meetings or open houses ▪ Focus groups with special populations (transit users, students in residence, parking permit holders)
Transit operations <ul style="list-style-type: none"> ▪ Spare capacity on campus routes ▪ Future route plans ▪ Available transit resources (fleet, drivers) by time of day 	<ul style="list-style-type: none"> ▪ Planning transit service improvements needed to carry additional passengers 	<ul style="list-style-type: none"> ▪ Transit system staff
Transit fare system <ul style="list-style-type: none"> ▪ Current fare collection system ▪ Future options and plans for fare technologies 	<ul style="list-style-type: none"> ▪ Evaluating options for U-Pass format (existing student card, new card, sticker) 	<ul style="list-style-type: none"> ▪ Transit system staff

Student surveys are an essential but challenging element of the information gathering stage. They are the best way to confidently understand how much students want a U-Pass, why they support or oppose it, what features they would like it to have, what they would be willing to pay for it, and how it might help overcome campus transportation challenges.

To conduct reliable surveys, it is important to get specialized help. Many colleges and universities have on-campus programs or groups (in statistics, business or journalism) that can help design, conduct and analyze surveys. The local transit system or municipality may also have an in-house survey resource, or use a third-party to conduct regular customer surveys. Failing that, most cities have consulting firms that can help. Most of these options will have a cost attached—a statistically valid telephone survey of several hundred students (a typical minimum number needed to create confident results) will usually cost several thousand dollars, but will repay itself many times over by helping to avoid obstacles later on. One example of a student travel and attitude survey, conducted during the planning stage for a universal transit pass at Fanshawe College in London, Ontario, is shown in Appendix B.

For more information on gathering much of the information described in Figure 4, see Chapter 3 of the *Commuter Options* toolkit available from Transport Canada’s website at www.tc.gc.ca/commuter.

3.3 Establishing terms and conditions

Before holding a student referendum on a U-Pass proposal, it is important to work out the key terms of that proposal. In general, the more U-Pass terms that can be agreed upon in advance, the better. Special effort should be paid to addressing potential “deal breakers”—elements that are critical to gaining the support of essential groups, including student voter sub-groups, the student association, the administration and the transit system. Where issues cannot be resolved in detail at the planning stage, they should at least be addressed in principle.

How much the U-Pass costs. The identified cost could be a range, a maximum, or a precise value. Will it be paid on an annual or semester basis? What subsidy, if any, will there be from the school administration or other source?

What student groups are included. There are several groups to consider:

- *Full-time students.* U-Passes are usually aimed at full-time students, which can be variously defined as those taking a minimum number of courses, those receiving a minimum number of hours of instruction each week, or those required to be on campus a minimum number of days each week.
- *Part-time students.* U-Passes may also involve part-time students, meaning those taking as little as one course. In taking this approach, it is important to consider fairness (part-time students may feel they are subsidizing full-time students), U-Pass format issues (card or sticker), and potential abuse (people registering for a single course as a way to get a low-cost transit pass).

- *Special status students.* Students registered in distance learning courses or programs (i.e. those who need not travel to campus) are usually exempted from U-Pass participation. Students registered in co-op programs but on a work term may be allowed to opt in to the program if their job is local.

Who can opt out. U-Passes only work if they are mandatory within the target population. Letting students opt out voluntarily and without restriction will undermine the program's economic feasibility, from the perspective of the transit system. That said, the student association usually reserves the right to decide which students, if any, may opt out. Some examples include:

- *Students with disabilities.* Typically, students who have a physical disability that prevents them from using public transit services can opt out of a U-Pass that is only valid on conventional transit routes. Even when the U-Pass is designed to be valid on specialized transit services intended for passengers with disabilities, disabled students who need to travel by car for other reasons may be allowed to opt out. In many Canadian cities, students with visual impairments who are registered with the Canadian National Institute for the Blind are exempt from paying transit fares, and may also be allowed to opt out.
- *Students otherwise eligible for free transit.* Some social programs may offer no-cost transit passes to their clients (such as a British Columbia program for low-income families), and these clients may be allowed to opt out.
- *Students living in certain areas.* Students who live outside the transit service area could also be allowed to opt out, but this provision could be subject to considerable abuse and would likely create a significant administrative burden (in fact, no Canadian instances of this opt-out provision are known).
- *Others.* Some U-Pass programs contain a provision for individuals to apply for exemption from the U-Pass fee on the basis of low income or other personal circumstance (such as the need to transport children). Such applications are usually considered on a case-by-case basis, and some student associations set up a special committee for this specific purpose.

Duration of the agreement. U-Passes for undergraduate students usually apply over an eight-month term (September through April) in accordance with the undergraduate academic year, but they may also apply over two separate semesters (September through December, and January through April). Graduate and community college students may see value in a U-Pass that is also valid over the summer (the four-month semester from May to August), or over an entire calendar year.

How the U-Pass fee was determined. U-Pass fees are typically based on the current total transit revenue from students (whether cash, tickets or passes), plus the anticipated cost of service improvements, plus (where appropriate) an administrative fee to cover the student association's costs of running the program. Making the calculations clear is advisable, because nobody likes to feel they are being taken advantage of. That said, setting an appropriate fee can be a challenge—and may be more art than science. Current student transit revenues may be determined confidently where special student tickets and passes are used, but in most instances (i.e. where students use regular adult fare media) they must be estimated based on the results of student surveys and transit ridership counts. Similarly, the cost of service improvements may be known with confidence where specific proposals are on the table; however, it may be easier for the transit system to identify a reasonable budget for service improvements, to be allocated and accounted for when actual future demands are known.

U-Pass facts

The University of Victoria Students' Society keeps 1% of student U-Pass fees to cover its annual program administration costs.

The University of Western Ontario University Students' Council charges \$1 from each student to cover the costs of production, distribution and administration.

What service improvements are proposed. Whether it is to serve increased demand, or to provide an incentive for students to support the U-Pass, transit service improvements are a usual part of U-Pass implementation. New or modified routes, extended service hours, increased frequencies, additional stops, new shelters and better passenger information are some of the ways that service can be improved. In some cases, specific improvements and their costs may be identified as part of determining the U-Pass fee. In other cases, the transit system may be more comfortable committing to a proportional increase in service hours, bus arrivals and departures, or transit vehicle capacity.

Value-added benefits. If U-Pass holders will be entitled to any special benefits aside from access to transit service, identifying those at the planning stage can be helpful in winning approval later on. For example, in Kamloops, B.C. the students of the University College of the Cariboo approved a U-Pass deal that includes year-long access to the Canada Games Pool facility, a benefit that added little cost to the pass but enhanced its value to many students (given that the annual cost of a regular adult pass to the pool would be over \$350).

Changes and renewals. It can be helpful to agree on the term of the proposed U-Pass program—for example, is it a one-year or three-year commitment? The U-Pass fee is a vital consideration—when the fee is subject to change, what magnitude of change is permitted, and how the change will be determined are all important issues. Having these questions answered at the planning stage will enable a more informed vote by students, and also provides a framework for the subsequent negotiation of a detailed contract.

Chapter 4: All aboard!

4.1 Winning approval

Before they can be implemented, U-Pass programs usually need to be approved by the student body through a referendum. Winning the referendum, however, is not the only goal. The long-term viability of the U-Pass program depends equally on students being well informed, on having sufficient eligible voters cast a ballot, and on having the result be perceived as definitive and fair. With that in mind, following are some guidelines for successfully winning U-Pass approval from students:

- *Build awareness and momentum before the referendum campaign begins.* The pre-referendum period is an opportunity to help students get comfortable with the U-Pass concept. External organizations that may be prohibited from getting involved in the referendum (such as transit systems and non-profit groups) can actively deliver supportive messages on campus, and regular coverage of the issue in campus media can build student familiarity with major issues. This is especially helpful since referendums are typically held concurrently with student elections, a time when multiple messages compete for students' attention.
- *Set the bar.* The student association should confirm what constitutes a definitive voting margin, if it is not prescribed in the association's constitution or bylaws. In some cases, the association may require more than a simple majority (say, 60% rather than 50% plus one) to take action.
- *Take a stand—maybe.* The student association should decide whether or not to take a formal position. Associations typically side with U-Pass supporters, sending a favourable message to students. However, in some cases the association may decide to remain officially neutral.
- *Support debate.* The student association should decide whether or not to support official “yes” and “no” campaigns. Regardless of the student association's formal position (if any), it may designate and even offer financial support to official groups leading both sides of the campaign. Doing so maximizes the odds of creating a full and open debate.
- *Maximize information.* The student association should offer complete and balanced information about the U-Pass. Program details (inclusion and opt-out rules, fee determination, etc.) can help minimize misinformation, confusion and suspicion. Presentation of the program's higher-level benefits (i.e. community and environmental issues on which “everybody wins”) is also needed, and helps to raise the level of debate above a strictly personal perspective (i.e. “You win, I lose”).
- *Get the vote out.* All efforts should be made to get as many students as possible to vote, a goal that is supported by holding the U-Pass referendum concurrently with student elections. Another benefit of holding the two votes concurrently is that election candidates are likely to stake out and debate their own position on the U-Pass issue.

- *Reach the audience.* Tools for reaching a broad cross-section of students, building awareness and encouraging voter turnout include printed information (e.g. flyers, posters) and special events (e.g. information centres, public meetings). **Exhibits 6 and 7** show some examples of promotional material. On-campus media (e.g. newspapers, radio) are influential, and all efforts should be made to ensure that journalists and editors have accurate information to work with. Off-campus media can also be influential (especially in reaching students' parents) but may be hard to attract unless there is significant controversy over the program, or unless transportation issues like congestion or air quality are major community concerns.
- *Phrase the question carefully.* The student association should make sure the wording of the referendum ballot clearly states the question, and identifies what will happen in the event of a positive vote. It should also identify any areas in which the student association requires ongoing authority, such as the power to negotiate key terms of the U-Pass agreement, to negotiate annual fee changes within a certain limit, or to monitor and recover administration costs through a surcharge on the U-Pass fee. This can avoid the need to conduct subsequent referendums for relatively minor purposes. **Exhibit 8** shows some examples of actual referendum questions.

Once approved by students, the proposed U-Pass program typically must also be approved by the university or college administration—a process that varies from one institution to another (here an administrator's simple signature, there a formal vote by a Board of Governors). Even though a student association may have maintained a neutral stance during a student referendum, it may now be required to play a stronger advocacy role in order to defend the expressed desire of its constituents. The request for administrative approval should be accompanied by clear evidence of student support and summary of the U-Pass program's benefits, with a focus on how the institution itself can gain from it. Any administrative concerns with the U-Pass identified through discussions to this point should also be noted and addressed with as much supporting information as possible.



Are you in favour of a mandatory, universal bus pass for full-time undergraduate students at a cost not to exceed \$75.00 per student, per year, from the months of September to April inclusive?

Yes No

University of Western Ontario — 1998 referendum to adopt universal transit pass

Are you in favour of continuing the mandatory, universal bus pass for full-time undergraduate students, for the month of September to April inclusive, at a cost of \$96.00 per student, per year, to be adjusted on a yearly basis according to the Ontario Consumer Price Index for Transportation?

Yes No

University of Western Ontario — 2000 referendum to renew universal transit pass

Are you in favour of a mandated universal bus pass for full-time SMU students at a cost not to exceed \$110 per students for the months of September-April inclusive, beginning in September 2003?

Yes No

Saint Mary's University — 2003 referendum to adopt universal transit pass

Are you in favour of maintaining the U-Pass program (currently \$44/semester) at a cost not to exceed \$47/semester on Sept. 1, 2001 and \$50/semester on Sept. 1, 2002?

Yes No

Effective Sept 1, 2003, are you in favour of indexing the four-month U-Pass fee to the price of one adult monthly bus pass less the university subsidy? (The University subsidy of the U-pass fee is currently \$4 per student per semester. If indexed to the price of a monthly bus pass, the cost to each student each semester would be at least four dollars below the retail price of one monthly bus pass.)

Yes No

University of Victoria — 2001 referendum to renew universal transit pass

EXHIBIT 8

Sample questions used in universal transit pass referendums at three Canadian universities

4.2 Making it work

Once the major elements of a U-Pass program have been planned and approved, a number of important design and administrative issues must be dealt with. This section discusses those, and attempts to highlight possible solutions to common challenges.

Building a U-Pass team. U-Pass implementation requires close cooperation between the student association and the transit system, with the college or university administration being a secondary but still important partner. Forming an implementation team with appropriate representatives of all three parties is a good way to ensure that things proceed efficiently and with good communication among stakeholders. The student association is likely to have several people on the team, the transit system may have one or two (with marketing and service planning staff being the most essential), and the school administration may have one representative who primarily has a monitoring function and may attend only as required.

U-Pass format. The student association and transit system must jointly identify an optimal format for U-Pass identification (see examples shown in **Exhibit 9**). The school’s administration would also be involved if the U-Pass identification involves the school’s regular student card. Options include:

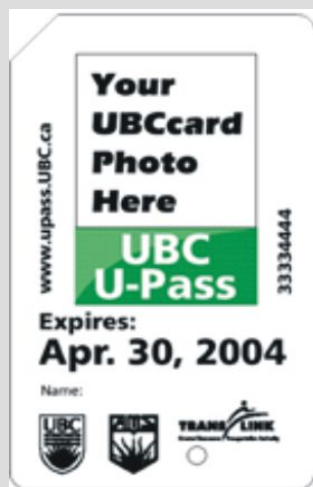
- *Regular student card.* At some schools, students simply show their regular student card as they board the transit vehicle. To minimize abuse, the card should have a photo of the student on it. This method requires that all card-bearing students also be valid U-Pass holders, because there is no way to distinguish those who may have opted out or not paid the appropriate fee. Thus, where part-time students are not U-Pass holders but receive the same card as full-time students, this method will not work.
- *Validated student card.* This approach requires the regular student card to bear some form of validation that confirms the holder is an eligible U-Pass holder in good standing. One type of validation is a paper or foil sticker on the front of the card that varies by year or semester; problems with stickers include poor adherence, buildup of glue residue over several years, and sticker interference in non-U-Pass “swipe” applications. A second type of validation is a special colour bar or other mark integrated into the card itself to distinguish eligible U-pass holders from other students; this approach works only when a new student card is issued each year. A third type of validation is encoding of a magnetic strip on the back of the card; this approach works only when transit vehicles are equipped with swipe-card readers, but it enables real-time validation and is highly effective in minimizing abuse of U-Pass cards.
- *Dedicated card.* Issuing a dedicated U-Pass card avoids issues related to the use of regular student cards, and provides good flexibility. If the student card has a photo, then the U-Pass card need only show the bearer’s student number (avoiding the cost and production time required for photo cards) as long as both cards are shown when boarding the transit vehicle.

EXHIBIT 9

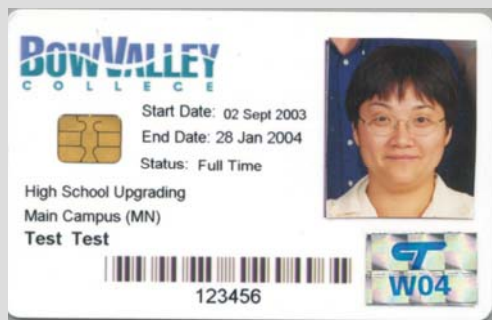
Sample universal transit pass identification formats



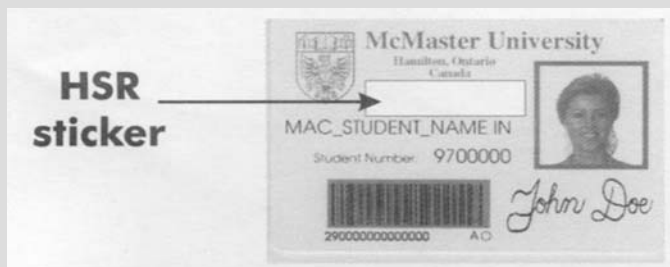
Dedicated universal transit pass card to be shown with student photo identification (University of Western Ontario)



Dedicated universal transit pass card (University of British Columbia)



Regular student cards validated with universal transit pass sticker (left—University of Calgary, right—Bow Valley College)



Regular student card validated with universal transit pass sticker (McMaster University)

Eligibility and exemptions. Section 3.3 discussed different student groups that may accompany full-time students in a U-Pass program, including part-time students, distance learning students, and co-op students on work terms. The same section also discussed a number of common reasons that individuals in those student groups may be exempted from paying the required U-Pass fee. In designing a U-Pass program, student associations and transit systems must determine which eligibility and exemption conditions should apply in their situation. While eligibility should be determined before the referendum because it can have a great effect on student support as well as the program's economics, exemptions are a "fine tuning" effort that will be affected by issues raised in the referendum debate, as well as simple humanitarian concerns. **Exhibit 10** shows one example of an exemption request form.

To maximize equity, consistency and transparency of the exemption process, some student associations have established special appeals committees to consider individual students' requests for exemption. For example, the University of Victoria Students' Society formed a U-Pass Appeals Committee that includes two directors of the society and one representative of the campus resource centre for students with disabilities.

U-Pass registration or distribution. When eligible U-Pass holders must receive a special card or have their student card validated, a distribution challenge results. The significant task of tracking who is eligible for and who has received the U-Pass is magnified by the need to concentrate thousands (or tens of thousands) of transactions into a relatively short period around the time of student registration. At larger schools, this significant effort may exceed the capacity of regular student information desks, and can require the creation of a temporary distribution centre with a suitable location and complement of staff capable of meeting demands. At Saint Mary's University in Halifax, the student association even worked with information technology staff to develop software that enables real-time checking of any student's status to see if they qualify for the U-Pass, and if they have already picked it up or not.

If transit operators will be checking for U-Pass validation at all times, it is important to ensure that the distribution system enables transit users to get their U-Pass as soon as they register. A more forgiving approach is to provide a grace period of one or two weeks at the beginning of the academic term, during which transit drivers accept still-to-be-validated student cards from riders, for students to validate their U-Pass.



U-Pass Program Office
Simon Fraser University

Exemption request
Summer 2004

Applicant information

surname _____ given names _____ SFU student # _____
 address _____
 city _____ province _____ postal code _____
 telephone (home) _____ (work) _____ email _____

I request exemption from the U-Pass Program as I meet the conditions of the following exemption provision (please choose one and provide required documentation):

- I do not reside within the Greater Vancouver Regional District and I will not be attending any classes held by Simon Fraser University within the Greater Vancouver Regional District during the term(s).
Supporting documentation from your faculty/department may be required to verify non-local status. Refer to www.sfu.ca/upass for further instructions.
- I hold a valid TransLink U-Pass from another post-secondary institution.
Please attach a photocopy of both sides of your valid TransLink U-Pass.
- I am on Exchange, Field School or Co-Op and will be residing and studying/working entirely outside of the Greater Vancouver Regional District for the duration of the term(s).
Supporting documentation from your faculty/department confirming your non-local status will be required. Refer to www.sfu.ca/upass for further instructions.
- I am registered with TransLink as a HandyDART user.
Supporting documentation from TransLink verifying your HandyDART status will be required. Refer to www.sfu.ca/upass for further instructions.
- I hold a valid non-transferable TransLink transit pass.
Please attach a photocopy of both sides of your valid TransLink pass.
- I have a documented physical or psychological condition that prevents me from using public transit.
Supporting documentation from the SFU Centre for Students with Disabilities will be required. Refer to www.sfu.ca/upass for further instructions. Do not forward personal medical documentation to the U-Pass Program office.

Other information to support your Exemption Request:

Student signature _____ Date _____

The information on this form is collected under the authority of the University Act (R.S.B.C. 1996, c.468, s.27(4)(a)), and according to Simon Fraser University's policy on the Collection of Personal Information – 110.05. It is related directly to and needed by the University in order to determine your eligibility for the U-Pass Program. The information will be used to validate your request for U-Pass exemption. If you have any questions about the collection and use of this information please contact the Director, Student Academic Resources at MBC 3200, tel. 604.291.4413.

Instructions:

- Please complete form in full
- It is the student's responsibility to ensure that the U-Pass Program office is provided with all required supporting documentation. For further instructions please refer to the U-Pass Program website at www.sfu.ca/upass.
- Drop off completed form and documentation at the U-Pass Program office (MBC 3297) or the Student Services General Enquires counter (MBC 3000) or mail to:
U-Pass Program Office
Simon Fraser University
8888 University Drive
Burnaby, BC V5A 1S6
- Deadline to submit spring term exemption requests: end of the second week of classes – **Friday, May 14, 2004**
- You will be informed of a decision by electronic mail. If you require notification by other means please indicate.

Office use only:

Decision by: _____
 Exemption request: Granted Denied
 Semesters granted: _____
 Reasons for approval/denial:

 Signature: _____
 Date: _____
 Notified: _____

EXHIBIT 10

Universal transit pass exemption request form (Simon Fraser University)

Fee collection and remittance. U-Pass fees are typically paid with other mandatory student fees at the time of registration, and are collected on behalf of the student association by the school administration. Once the receipts have been reconciled, the administration forwards the U-Pass fees (along with its own financial contribution, if any) to the student association in one or more scheduled payments. The student association then remits the U-Pass funds, less any administration fee it has been empowered to retain, to the transit system over the course of the year. The remittance schedule varies from case to case, but three examples (taken from the case studies in Appendices C through E—note that some percentages are approximate, based on fixed fees) are shown below:

- University of Victoria
 - 25% in October
 - 12.5% in each of November and December
 - 25% in February
 - 12.5% in each of March and April
- University of Western Ontario
 - 25% in September
 - 12.5% in each of six months from October through March
- Saint Mary’s University
 - 10% in October
 - 45% in each of November and February

Formalizing the U-Pass agreement. The roles and responsibilities of the student association, the transit system and the school administration (where appropriate) with regard to the U-Pass program should be recorded in the form of a legal contract signed by all affected parties. It is important that each party receive independent legal counsel before committing to the contract.

Promoting the U-Pass launch. Preparations for the first year of any U-Pass program must include clear, accessible information for students. A brief program notice and concise description could be included in academic calendars, student activity guides and residence welcome kits, and similar information can be included on posters around campus. More complete information about the program’s rules and regulations, with specifics about how to pick up or validate the U-Pass, how to apply for an exemption, how to use the pass and how to replace it if lost, could be included in registration packages and on flyers distributed at registration and other popular spots on campus.

Exhibits 11, 12 and 13 show some examples of promotional materials.

Who is eligible?

It is mandatory for all full-time students registered in three or more on-campus courses. Part-time students are not eligible.

How much does it cost?

- All full-time students registered in three or more on-campus courses per semester will be charged a mandatory \$110 U-Pass fee, collected with other student fees.
- Students who are registered in fewer than three on-campus courses in the fall semester but are registered in three or more on-campus courses in the winter semester will be charged \$55 for the U-Pass from January to April.
- Students commencing their studies at Saint Mary's registered in three or more on-campus courses the winter will also be charged the \$55 rate.

Where do I obtain my U-Pass sticker?

Remember, the U-Pass is only available to full-time students enrolled in three or more on-campus courses!

Your U-Pass sticker is available beginning Monday (even if it is Labour Day!), the week classes begin, each semester. You can pick up your U-Pass at the Information Desk in the lobby of the Student Centre. Simply show your validated student ID and the Desk staff will put the U-Pass sticker on your ID card.

No student ID? Pick one up at the Services Plus desk in the Patrick Power Library.

Student ID lost, stolen, or destroyed?

To replace your student ID there is a \$15 administrative charge payable at the Services Plus Desk located in the Library. An additional \$5 administration charge for issuing a replacement U-Pass sticker is payable at the Information Desk in the Student Centre.

Bus Information

Bus schedules and route maps are located at the Information Desk in the Student Centre and on information posts at campus bus stops.

For further transit schedule and route information, please call the JIRM Call Centre at (902) 496-4000 between 7:30 a.m. and 10 p.m., seven days a week. Or to find out when the next two buses depart any stop, dial 465 plus the red four digit telephone number displayed on your nearest bus stop sign.

Appropriate Use of your U-Pass

Your U-Pass cannot be loaned, sold or otherwise transferred in any manner to any other person.

Metro Transit will confiscate student IDs with U-Pass stickers, which are not used specifically by the student whose picture appears on the ID card. If a Metro Transit bus driver has confiscated your student ID, please contact the General Manager of SMUSA, on the 5th floor of the Student Centre.

Students who abuse their U-Pass privileges will have their U-Pass revoked and will not receive a refund.

Students with Disabilities

Saint Mary's University students with disabilities who use Access-A-Bus are eligible to use this program, although they may drop out if they wish. To opt out please visit SMUSA 5th floor Student Centre. Students with a CNIB pass do not have to use this program and must visit the 5th floor Student Centre to waive this program.

Refunds

The U-Pass is non-refundable. However, under certain conditions such as retroactive withdrawals and/or leaving school, some students may qualify for a partial reimbursement. For more information please visit www.smusa.ca.

Why Would I Want a U-Pass?

- ☑ **Save Money!**
Monthly Bus Pass = \$51.00
U-Pass = \$13.25 (monthly)
Savings = \$37.75! (Monthly)

One round-trip per week (over the academic year) will be enough to make use of your U-Pass!
- ☑ **Works for Car Owners:** The U-Pass can drastically reduce your fuel, insurance, maintenance, and parking expenses.
- ☑ **Think Safety:** Had a few drinks? The U-Pass provides a safe alternative to driving under the influence of alcohol.
- ☑ **Greater Access!** More affordable housing opened up as the U-Pass allows an easy means of transport throughout the HRM. Those living close to SMU or on campus have greater access to services and facilities around the city, such as shopping malls and the downtown core.
- ☑ **Convenience!** Due to the increase in ridership, Metro Transit will add a greater number of trips to bus routes servicing Saint Mary's. For more details, check out the special Metro Transit flyer being distributed on campus.
- ☑ **Good for the Environment!** Choosing public transit in place of a car results in lower air pollution and reduces the threat of climate change.
- ☑ **A Healthier Choice:** The operation of a single bus replaces the emissions of 50 cars in rush hour and reduces air pollution by 10-25 times. *Breathe easier!*

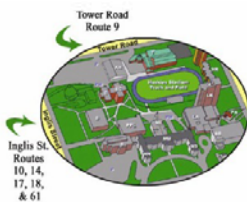
What will the U-Pass look like?



The U-Pass sticker will be placed in the bottom left-hand corner of your validated Student Identification card

When boarding a bus please have your U-pass ready and visible.

Where can I catch a bus on Campus?



For Go Times and route information, pick-up a Metro Transit Schedule at the SMUSA Info Desk, call 496-4000, or look it up on the web at www.region.halifax.ns.ca/metrotransit

Questions?

If you have any questions about the U-Pass, please contact SMUSA on the 5th floor of the O'Donnell-Hennessey Student Centre, by phone at (902) 496-8700, or by email at rob.finn@smu.ca or info@smusa.ca

For more information about sustainable transportation solutions, check out www.trans.ns.ca or call the TRAN program of the Ecology Action Centre at 429-0924.



Metro Transit



An Ecology Action Centre Project

Saint Mary's University
Students' Association
5th Floor Student Centre
923 Robie Street
Halifax, Nova Scotia,
B3H 3C3

www.smusa.ca

The SMUSA U-Pass



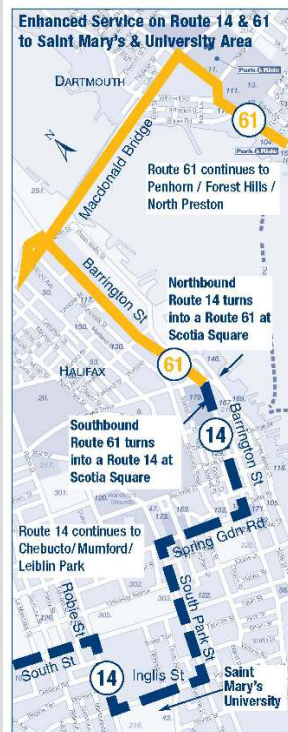
Info & FAQ's

The U-Pass is a special transit pass that provides full-time students registered in three or more on-campus courses with unlimited access to Metro Transit's buses and ferries for the academic year, from September through April.

The U-Pass was approved by student referendum in February 2005 and exists at many other universities across the country, such as Western Ontario, Queen's, Trent, Victoria and Guelph

EXHIBIT 11

Information flyer developed to promote the launch of the Saint Mary's University U-Pass



Read All About It!!

EXTRA EXTRA Metro Transit Expands Service to Universities

Effective August 24, 2003

Metro Transit is pleased to announce increased bus service from various areas throughout the city to Saint Mary's and the university area in conjunction with the introduction of the "Transit U-pass" at Saint Mary's University this fall.

Route 14 Leblin Park will be extended to service Saint Mary's University daily from 6 am to 11 pm.

The Route 14 Leblin Park currently travels downtown via Quinpool Rd, Summer St., Spring Garden Rd. to Barrington St. during peak hours. Much of this routing is duplicated by the Route 32 Cowie Hill and the Route 20 Herring Cove.

It will change as follows: from the Armdale Rotary the bus will travel to Dutch Village Rd, Mumford Rd (stopping on-street at Mumford Terminal) Chebucto Rd, Oxford St, South St and Robie St to Inglis St. The extension will be effective during peak and off-peak hours, seven-days-a-week. (Currently off-peak trips stop at Mumford Terminal.)

To further minimize the impact of this change, the downtown loop of Route 32 Cowie Hill (which now travels Quinpool Rd, Cunard St, Barrington St, Spring Garden Rd

and Summer St) will be reversed* to travel Bell Rd, Summer St, Spring Garden Rd and Barrington St. Changing the loop direction will reduce 'back tracking' to Summer St and more closely match the existing peak Route 14 Leblin Park.

Increased frequency **Route 17 Saint Mary's** will increase in frequency during off-peak hours to operate every half hour.

Currently this route operates every half hour during peak periods and every 60 minutes during the midday.

extended **Route 61 Auburn / North Preston** will also extend to Duke/Barrington in Downtown Halifax where the bus will continue on to Saint Mary's University and Mumford Terminal as a Route 14.

OTHER ADJUSTMENTS PLANNED FOR THE AUGUST SCHEDULE CHANGE ARE:

Route 1 Spring Garden will have the midday frequency adjusted to reflect the extension of the Routes 14 & 61.

Route 20 Herring Cove will service downtown more frequently during weekdays. The mid-day frequency to downtown will increase from one trip per hour to two trips per hour. Hourly evening service be extended to downtown.

Route 32 Cowie Hill will reverse the current loop (see above*) in the Coburg/Barrington/Spring Garden area, to allow for a more direct trip to the hospitals.

The routes that service the university area are as follows:

- Route 9 Barrington**
- Route 10 Dalhousie**
- Route 14 Leblin Park** *extended*
- Route 17 St Mary's** *increased frequency*
- Route 18 Universities**
- Route 61 Auburn / North Preston** *extended*

Route 59 Colby Village frequency will increase to every 30 minutes between 9:00am and 3:00pm, weekdays only.

For complete details, please pick up a new Metro Transit Route Map and Riders' Guide Schedule Book (August Issue - available by the 2nd week in August), visit our website at: www.halifax.ca/metrotransit, or call our **Customer Service Line** at **490-4000**.

Route 14 & 61 Enhanced Service to Saint Mary's & University Area see back panel.



EXHIBIT 12

Flyer announcing improved Metro Transit service in conjunction with the Saint Mary's U-Pass launch



EXHIBIT 13

Poster promoting Hamilton Street Railway service in conjunction with the McMaster University U-Pass

4.3 Building on success

Once a U-Pass program is underway, efforts shift from design and implementation to maintenance and enhancement. The key elements of the program's second stage are discussed in the following paragraphs.

Maintaining student awareness. Due to the high rate of student turnover and the number of issues that compete for students' attention, it is important to promote the U-Pass on a continual basis. The focus of promotion will be at the beginning of the academic year, but also at the start of other semesters. Helping campus newspapers to find newsworthy stories (e.g. reports on ridership increases, favourable interviews with school administrators or community leaders) can maintain the program's profile during the school year.

Monitoring. A person within the student association should be appointed to lead U-Pass monitoring efforts. This role involves communicating with the transit system and keeping track of new ridership data or service changes. It also involves tracking input from students and the transit system pertaining to the U-Pass format (card, sticker, etc.), abuse or other issues.

Promoting transit use. A new U-Pass program is likely to increase student transit ridership significantly in the short term. It can also enable a more gradual, long-term increase in transit ridership by making students more responsive to future transit promotions and service improvements. The student association can work with the transit operator to establish reliable channels for transit-oriented promotions—such as links or information on the association's website, and transit information stands or dedicated bulletin boards in prominent locations. Also, because U-Pass fees typically contain a provision for the cost of new services, students should be encouraged to express their opinions about what those new services should be—for example, the introduction of extended hours, new routes or special services to key destinations. In this way, U-Passes provide motivation for students to talk about how transit can be more efficient and effective for them—a dialogue that can itself promote transit use.

Renewals and fee increases. There are a variety of ways of dealing with the need to renew and amend, over time, the terms and conditions of the U-Pass program. U-Pass contracts lasting more than one year should specify, if applicable, how and when the U-Pass fee may change each year. As long as the student referendum question was phrased in a way that does not unreasonably limit the student association's ability to approve U-Pass fee changes, it should not be necessary to hold a referendum on foreseeable fee increases.

U-Pass facts

Students at the University of Victoria have indexed the cost of their U-Pass to \$4 less than the cost of a regular monthly adult transit pass.

Students at the University of Western Ontario have tied fee increases for their pass to the Ontario Consumer Price Index for Transportation.

Integration with other sustainable transportation projects. As discussed in Section 1.1, many Canadian colleges and universities are looking for ways to foster the use of sustainable transportation modes on campus. U-Passes are a big step in the right direction, but they can be complemented by—and even integrated with—many other initiatives. For example, the University of British Columbia’s TREK program has launched a universal transit pass to complement its cycling and carpooling programs, local shuttle routes, and emergency ride home service (see www.trek.ubc.ca for more information). The campus administration should also promote the convenience of the U-Pass as part of its ongoing parking management strategy, and particularly when implementing any parking capacity reductions or parking fee increases.

Appendix A Useful contacts

General resources	
Canadian Urban Transit Association	Jaspreet Birk Telephone: (416) 365-9800 ext. 113 Email: birk@cutaactu.ca Web: www.cutaactu.ca
Canadian Federation of Students	Web: www.cfs-fcee.ca
Transport Canada's Commuter Options guide	Web: www.tc.gc.ca/commuter
Universal transit pass programs	
Brock University St. Catharines, Ont.	Web: www.busu.net/upass.asp Web: www.brockbuspass.com
Camosun College Victoria, B.C.	Michel Turcotte, Director of Services Email: turcotte@camosun.bc.ca
Fanshawe College London, Ont.	Paul Masse, Business Manager, Fanshawe Student Union Telephone: (519) 453-3720 ext. 225 Email: pmasse@fanshawec.on.ca
McMaster University Hamilton, Ont.	Email: act@mcmaster.ca Web: www.msu.mcmaster.ca/hsr
Saint Mary's University Halifax, N.S.	Vice President, Internal Affairs Saint Mary's University Student Association Telephone: (902) 496-8709 Email: vpinternal.smusa@smu.ca Web: www.smusa.ca/upass.php Web: www.region.halifax.ns.ca/metrotransit/schedules/Upass.html
Southern Alberta Institute of Technology Calgary, Alta.	Katie Butler, Supervisor Campus Centre Facility Operations Telephone: (403) 284-8035 Email: katie.butler@sait.ca
University of British Columbia Vancouver, B.C.	TREK Program Telephone: (604) 827-8735 Email: trek@ubc.ca Web: www.trek.ubc.ca
University of Calgary Calgary, Alta.	Email: upass@ucalgary.ca Web: www.ucalgary.ca/UPASS
University of Victoria Victoria, B.C.	Sarah Webb, Interim Sustainability Coordinator Telephone: (250) 472-5011 Email: sarahwebb@fmgt.uvic.ca
University of Western Ontario London, Ont.	Nick Vassiliou, InfoSource Manager Telephone: (519) 661-3572 Email: uschplan@uwo.ca Web: www.usc.uwo.ca/buspass

Appendix B Sample survey of student travel habits and attitudes

The survey shown below was administered by telephone to a random sample of students at Fanshawe College by Statlab, on behalf of the London Transit Commission and the Fanshawe College Student Union.

Student Transit Survey & Opinion Poll

ID #: _____		Name: _____	
Tel #: _____		Sex: M F	
		Comments	
STATUS	call #1 ___	Contacted	Y N _____
STATUS	call #2 ___	Contacted	Y N _____
STATUS	call #3 ___	Contacted	Y N _____

Hello, my name is _____, I am calling from the STATLAB. We are conducting a survey for the Fanshawe Student Union to determine how much Fanshawe Students use London Transit buses and get your opinion on a possible universal transit pass.

Your responses will be kept in strict confidence. If you prefer not to respond to a particular question simply indicate that you do not wish to respond.

0. Would you be willing to take five minutes to answer a few simple questions?

YES ___ CONTINUE →→
NO ___ STOP // OK Goodbye

1. About what percentage of the time do you use each of the following methods to commute from your residence (where you live) to campus:

Walk _____ %
Bicycle _____ %
Bus _____ %
Car _____ %
Other _____ % Please Specify _____ **(Should total 100%)**

(If they use a car ask) When you get to campus in a car are you the driver ___ or a passenger ___ ?

(If they are the driver ask) Do you have a pass for student parking? Yes ___ No _____

If they use the bus go to question 3 – otherwise ask question 2

2. Do you ever use LTC buses? YES CONTINUE
NO GO TO QUESTION 5

3. We would like to know about how many one-way bus trips you make in a typical week. For example if you take the bus to school in the morning and return later in the day that is two one-way trips. In a typical week, how many one-way trips do you make in total on:

Monday thru Friday _____
Saturday _____
Sunday _____

So you make approximately **(total of the above)** one-way trips in a week – does that sound right? (If they can't come up with a single number for any of the three times ask for a range)

4. About what percentage of the time do you use each of the following methods of payment:

Semester Pass _____ %
Post Secondary/Monthly Pass _____ %
Citipass _____ %
Tickets _____ %
Cash _____ % **(Should total 100%)**

5. A flat-rate bus pass system would allow you to ride the bus by showing your Fanshawe ID card. A compulsory student fee that you could not "opt out" of would be collected along with tuition fees.

What is your opinion of such a flat-rate bus pass system?

Strongly Favour _____
Favour _____
No Opinion _____
Oppose _____
Strongly Oppose _____

(If they say it depends on the price do question 6 first. Ask them what they would be willing to pay and then come back to this question.)

6. If such a system were instituted (regardless of your opinion) what would be a fair price to charge all students for such a plan?

\$ _____ (if they can't give a figure ask for a range OR if they ask how much it costs now tell them a semester pass costs \$196) OR don't know _____ (if they can't give a range)

Demographics: It is important that we have an accurate picture of who is represented in this survey. Please help us by providing some information about yourself:

7. What year of your program are you in _____?

8. Are you a full-time student? Yes No

9. What is your postal code _____ OR (if they don't know) the nearest intersection to your residence _____ & _____

Thank you for your help.

Appendix C Case study: University of Victoria

Summary

The University of Victoria U-Pass was approved by student referendum and launched in 1999, and subsequently renewed in 2001. It gives unlimited access to all BC Transit services in the Victoria area to all undergraduate and graduate students taking at least one course, at a cost of \$56 for a four-month pass in 2004-2005. The fee is supplemented by a subsidy from the university of \$4 per student per semester, taken from parking revenues.

Program participants are identified by a magnetically encoded strip on their student photo identification cards. The program is mandatory, with very limited exceptions. It is administered by the University's Students' Society.

Results have included a drastic increase in campus transit ridership, with 51% of students taking the bus to school in 2003.

Community and institutional context

Victoria. With a metropolitan area population of 300,000, Victoria is the capital of British Columbia. The community lies at the southern tip of Vancouver Island, and enjoys one of Canada's mildest climates. The economy of the Victoria area is supported by strong tourism, public administration, defence and retail sectors, and has a growing advanced-technology sector.

Victoria residents are strong users of sustainable transportation modes. They boast a rate of car commuting that is among lowest in Canada, with 10% of commuters taking transit to work, 10% walking and 5% cycling.

The Victoria Regional Transit System is operated by BC Transit, a provincial agency. In 2002 it carried about 22 million passengers with a fleet of almost 180 buses, including the first low-floor double-decker buses in regular service in North America. The adult transit fare is \$2.00 cash, a \$1.75 ticket, or a \$60 monthly pass.



BC Transit double-decker bus (courtesy BC Transit)

University of Victoria. The self-contained campus of the University of Victoria (UVic) is located centrally, but several kilometres outside the downtown core. The institution's 2003-2004 enrolment included 16,000 undergraduate and 2,400 graduate students, 33% of whom attend part-time, and 72% of whom come from outside the Victoria area. The number of full-time equivalent students is about 13,500, and the number of employees is 4,300. In September 2004, there will be almost 2,200 student residence spaces plus 180 family housing units.

Over the last 10 years, the University's enrolment has grown an average of 2% per year. With this growth has come increased pressure on internal and surrounding road networks, and on campus parking facilities. The current parking supply of about 4,500 spaces is adequate, but will drop by 33 spaces in 2004-05 as a new building is erected on a former surface lot. The university recognizes that negative transportation impacts on the campus and the surrounding community can only be avoided through transportation demand management strategies that foster the use of public transit, cycling and walking. Accordingly, parking costs rose by 90% over the period from 1993 to 2002. A parking permit now costs about \$155 yearly, \$90 per semester, \$30 monthly or \$5 daily, and will cost 15% more in 2004-2005.

Transit service to the campus includes four all-day transit routes and four routes that run during weekday peak periods. About 16 buses arrive during the morning rush hour, and about 12 buses depart during the afternoon rush hour.



University of Victoria campus (courtesy University of Victoria)

Rationale and objectives

The development of a universal transit pass program for UVic students represented a win-win-win scenario for the main involved parties.

On campus, the university administration appreciated the benefits of such a measure from a growth management perspective (as discussed in the previous section). The student association and many student groups sought to create an affordable, flexible transportation option for all students, but also cited the benefits of reduced traffic—less pollution, safer streets, reduced drinking and driving. The protection of greenspace by avoiding the need to build new parking lots was also a significant issue.

BC Transit supported efforts to increase transit use by students in order to increase ridership in a cost-effective manner. Improving service to attract new riders is a relatively expensive strategy, compared to a revenue-neutral measure that simply makes transit more affordable to all students. While the initiative would improve the utilization of existing services at little extra cost (particularly in mid-day, evening and weekend periods), some new services could be added that would benefit the entire community. Based on experience elsewhere, BC Transit planners forecast that the U-Pass would increase student transit ridership by 15% to 50%.

Actions: Planning

There were four main stages in the development of the U-Pass program that preceded its implementation.

Survey. In the fall of 1998, a survey was conducted of students enrolled at UVic and Camosun College (Victoria's community college, with one campus not far from the university and another in a western suburb). The survey was not preceded by extensive promotion, and sought to establish a baseline of student travel choices and attitudes. It asked 600 UVic undergrads, 125 UVic graduate students and 250 Camosun College students about their primary and secondary commuting modes and distance travelled, their attitude toward a universal bus pass, the price (if any) they were willing to pay for it, and whether they would use it if introduced. Key results included:

- Among undergraduates—54% for the idea, 41% against it
- Among graduate students—70% for the idea, 25% against it
- Among undergraduates who usually drove to campus—36% for the idea, 50% against it
- Support was greatest among transit users, and declined among cyclists, pedestrians and car drivers

Negotiation. Following the survey, negotiations among student groups, the university administration and BC Transit established the key terms of a proposed U-Pass agreement. The key principles of mandatory participation (with some exceptions) and transit revenue neutrality were quickly agreed upon. The determination of a fair pricing scheme (initially estimated to be around \$43) was based on the following considerations:

- The estimated annual transit revenue from Victoria-area post-secondary students was \$2.4 million, with \$1.5 million from monthly transit pass sales and \$0.9 million from ticket and cash fares
- The total number of post-secondary students served by transit was 24,400
- U-Pass revenue had to total close to the \$2.4 million figure, with the expectation that some added revenue would arise from students who occasionally forget their pass or who are among the few to be exempted from the program.
- UVic administration would contribute about \$170,000 annually (\$4 per semester per student) and Camosun College would contribute \$60K, both from campus parking revenues

To better illustrate the benefits of a U-Pass to students, BC Transit identified the several service improvements it was willing to make. These included more buses on campus routes, extension of service heading downtown after midnight, new weekend services to the BC Ferry terminal and a new cross-town route linking two Camosun College campuses.

Awareness building. Leading toward an eventual student referendum on the issue, U-Pass supporters generated significant attention and support from both campus and community newspapers, and local television stations. Local mayors, Councils, provincial MLAs and local community associations all endorsed the idea, citing reduced emissions, improved road safety, and lighter on-street parking demands. The “Yes” side campaigned with a long list of U-Pass benefits including those discussed under Rationale and Objectives (above). Other positive points included:

- The prospect of easier and less costly campus parking for those who continue to drive
- The convenience to occasional transit users who make trips to downtown on weekends
- The ease of using a student pass for occasional trips rather than cash or tickets
- The ability of cyclists to take transit in bad weather, at no cash cost
- The ability of students enjoying themselves at pubs to get home by transit rather than driving

Regular transit users (about 25% of the student population), and other students who thought they might become regular transit users, were key supporters of the proposal. Those resisting the U-Pass proposal included:

- Students who would continue to drive and thus felt they would receive little benefit
- Pedestrians who felt they would not get good value for their money
- Students in residence who saw limited utility in having a transit pass
- Cyclists who felt transit, while less polluting than car travel, still polluted and should not be promoted ahead of walking and cycling
- Individuals who felt, in principle, that the program should not be mandatory

Referendum. A referendum of members was required to enable the undergraduate and graduate student associations to enter a contract with BC Transit. The vote was scheduled to coincide with the student elections, to maximize both discussion by candidates and turnout by voters. The results of the referendum included 68% support among UVic undergraduates, 69% support among UVic graduate students, and 59% support among Camosun College students.

Actions: Implementation

This section describes key aspects of the UVic U-Pass.

Eligibility. The U-Pass is valid for unlimited access to BC Transit services in greater Victoria during a given semester (September 1 through December 31, January 1 through April 30, May 1 through August 31). It is mandatory for all students registered in at least one credit course, meaning all full-time and part-time undergraduate and graduate students. Students not required to pay the U-Pass fee include those registered only in distance education programs, those who receive transit passes from a social service program for low-income persons, those whose mobility disabilities prevent them from using BC Transit or handyDART paratransit services, and others in exceptional circumstances as approved by a U-Pass Appeals Committee. Co-op students on a work term in the Victoria area may voluntarily join the program.

Card. The U-Pass program uses the UVic student photo identification card that students already use to access campus libraries and recreational facilities. Initially, the U-Pass was validated using a foil decal on that changed colour each term. In 2002, BC Transit changed its fare collection system and monthly pass users started to swipe their pass cards as they entered buses (a beep indicates to the driver that each pass is valid). This change in technology enabled the U-Pass program to make use of the magnetic strip on the reverse of the student card, which minimized the chance of fraudulent use and eliminated the need for bus drivers to check each passenger's picture and card expiry date.

Registration. Returning UVic students have the magnetic strip on their student identification cards encoded at the campus Photo ID centre. New students automatically receive an activated card. The electronic nature of the on-board fare collection simplifies pass management—lost cards are automatically cancelled, and students withdrawing from all courses are reported to BC Transit and their card becomes invalid.

Fees. Upon its initiation in 1999, the U-Pass reduced the monthly cost of transit pass for UVic students from \$36 to \$11 dollars (i.e. a \$44 fee spread over four months). In 2004-2005, UVic students will pay a U-Pass fee of \$56 a semester. The fee is set at the beginning of each academic year, and is now indexed to be \$4 below the cost of a BC Transit adult monthly pass as of the previous 1 July. This provision was included in the 2001 U-Pass renewal referendum to minimize the need for another referendum every time the fee changed. The University collects U-Pass fees from students when they register for classes at the start of each semester.

Remittances. UVic remits U-Pass fees paid by undergraduate and graduate students to the UVic Students' Society, accompanied by its own contribution of \$4 per student per semester, in six yearly installments. The society, in turn, remits U-Pass fees and the university's subsidy to BC Transit in eight yearly installments, accompanied by a reconciliation statement that identifies the number of students registered and exempted and the associated fees collected. The society retains 1% of U-Pass fees as a commission to cover the costs of program administration.

Service improvements. BC Transit has made several service improvements enabled through U-Pass fees:

- The addition of buses to campus routes in morning and afternoon peak hours
- A 45-minute service extension (to 12:30 a.m.) of evening routes leaving UVic for downtown
- The addition of afternoon and evening service on Fridays and Sundays between the campus and the BC Ferry terminal, used by students heading to the British Columbia mainland for the weekend
- A new cross-town route connecting the two Camosun College campuses

By 2003, the number of buses serving the UVic campus on three key routes had increased by about 15% over pre-U-Pass levels. The actual passenger capacity on these routes increased even more, due to the high proportion of double-decker buses put into service on these routes starting in 1999.

Promotion. The UVic Students' Society is largely responsible for promoting the U-Pass program on campus. Early in the year, particularly during the university's Welcome Week, a blitz is held (using an information booth, inclusion in orientation guides, and so on) to clarify U-Pass benefits and requirements. The U-Pass is also touted as an advantage of attending UVic when undergraduate representatives make presentations to potential students at local high schools.

Ongoing planning. Representatives of U-Pass partners (BC Transit, UVic, the UVic Students' Society and the Graduate Students' Society) meet at least once yearly to review transit service issues and the program's status with regard to financial and administrative matters. Meetings with BC Transit route planners are held several times each year to fine-tune service schedules with course dates, holidays and exam periods. BC Transit drivers and operations staff also regularly report on street-level service issues that require adjustments.

Monitoring. BC Transit continuously collects passenger count data as part of regular operations. As part of its ongoing campus growth management, the University conducts comprehensive traffic counts every four years that enable it to quantify overall use of walking, cycling, transit and car travel by students and staff.

Renewal. The U-Pass program's initial two-year implementation period ended in 2001. A referendum in March of that year asked students whether they were in favour of maintaining the program and indexing the semester-based U-Pass fee to \$4 below the cost of a regular adult monthly pass. The referendum questions received support from 83% of student voters, an increase over the roughly 70% who voted for the U-Pass in 1999. The renewed U-Pass contract, signed by BC Transit, UVic Students' Society, UVic Graduate Students' Society, and UVic administration, will remain in force continuously until one of the parties decides to withdraw (requiring eight months' notice).

Results

The introduction of the U-Pass for post-secondary students in the Victoria area led to a drastic increase in student transit ridership. In 1997-1998, before the U-pass, post-secondary students represented 13% of Victoria transit ridership, but by 1999-2000 that number had increased to 24%.

At UVic, the proportion of students holding transit passes increased overnight from 17% to virtually 100%. As a result, the 31% of students who took transit to and from the campus in 1998 increased to 44% in 2000, 47% in 2001 and 51% in 2003. At the same time, the rate of car drivers dropped from 20% to 19%, car passengers dropped from 22% to 13%, and pedestrians dropped from 20% to 13%.

The following chart shows that the U-Pass also had a significant impact on overall campus transportation patterns.

Travel mode of staff and students	Share of travel to/from campus in peak hours	
	1996 (before U-Pass)	2000 (after U-Pass)
Car driver	57.6%	54.4%
Car passenger	15.7%	11.0%
Transit	11.1%	17.8%
Cycling	6.9%	5.5%
Walking	8.7%	11.3%

Other notable results of U-Pass introduction include:

- Student ridership on three key BC Transit routes serving the UVic campus increased by 28% to 48% from pre-U-Pass levels to 2003.
- The number of parking permits sold by the university in the fall of 2000 dropped by 12% from the previous year.

- Local parking enforcement officers reported a significant reduction in illegal parking in the residential areas around campus.
- Student groups noted that the U-Pass helped to combat drinking and driving, reduced traffic and parking demands, made parking easier for those who continued to drive, protected campus greenspace from replacement by parking lots, and added convenience for occasional transit users such as students in residence who traveled downtown on weekends.
- Local politicians were happy to have a transit success story.
- Transit unions were pleased by the increase in drivers needed to improve service.

Participants

Student groups. The responsibilities of the UVic Students' Society (which also acts as an agent for the Graduate Students' Society) have included:

- Initial work on research, student surveys and negotiations that led to a firm U-Pass proposal
- Awareness and coalition building that led to a successful referendum
- Ongoing administration of eligibility (protocol and appeals for opting in or out of the program) and remittances
- Ongoing promotion through posters, pamphlets, booths and open forums to build and maintain student awareness

Other campus groups (notably those involved with sustainability and environmental issues) played an important role in the two successful U-Pass referenda.

University administration. Key roles of the administration (notably the office of the Vice-President of Finance and Operations) have included collecting and remitting student fees, contributing its own subsidy from parking revenues, and encoding student cards for use on-board buses.

BC Transit. Several departments were involved (e.g. planning, operations, finance) in negotiating the U-Pass terms and conditions, and in committing to and delivering the service improvements needed to meet growing demands.

Media. BC Transit and student representatives both emphasize that positive media coverage served as inexpensive marketing, and was essential to the success of the initial U-pass referendum. Editorial press in local papers built community exposure and reached the parents of students.

Resources

All participants emphasize that the resources required by the U-Pass program are minimal, in view of its benefits.

Students. The UVic Students' Society acknowledges that U-Pass initiation (research, negotiation, awareness building and referendum) was intensive. However, on an ongoing basis only 350 hours of person-time are required annually to help the program run smoothly.

BC Transit. BC Transit also noted that the U-Pass required significant work to get up and running, but that it needs minimal administrative resources during the school year. While the agency makes no financial contributions, per se, it has increased both service levels and capacity considerably to serve the growth in student demands.

University administration. The UVic administration contributes a U-Pass subsidy of \$4 per student per semester from campus parking revenues. This amount is paid to BC Transit through the UVic Students' Society Association.

Timeline

Summer 1998. Research into U-Pass experience and issues

Fall 1998. Survey of UVic student travel habits and attitudes toward a U-pass, and negotiation of key U-Pass terms and conditions

Winter 1998. Awareness-building among students and community

March 1999. Referendum on U-Pass initiation

September 1999. U-Pass launch with two-year contract

March 2001. Referendum on U-Pass renewal and price increase

Fall 2002. Initial use of encoded magnetic strips on student cards, rather than foil stickers

Next steps

U-Pass implementation for UVic students is complete, and all parties wish it to continue for the foreseeable future. However, in looking ahead the student association would like BC Transit to improve its campus services further by introducing special event routes and upgrading passenger amenities and user information. BC Transit, for its part, hopes to bring a U-Pass to Victoria-area high schools and non-academic training institutions.

Appendix D Case study: University of Western Ontario

Summary

The University of Western Ontario Bus Pass was approved by student referendum and launched in 1998, and subsequently re-approved in 2000. It gives unlimited access to all London Transit services to all full-time undergraduate students, at a cost of \$103.75 for the eight-month academic year in 2003-2004.

Program participants are identified by a Bus Pass card printed with their student number that they must show with their student photo identification card. The program is mandatory, with very limited exceptions. It is administered by the University Students' Council.

Results have included a 50% increase in campus transit ridership over the first year of the program. A similar program is also offered to graduate students.

Community and institutional context

London. The City of London (population 340,000) lies at the heart of southwestern Ontario, halfway between Toronto and Windsor and 200 kilometres from both. The city has a large manufacturing presence and is a national health care centre, with 15 hospitals and a large medical research establishment.

The London Transit Commission operates the local transit system as an agent of the City of London. In the late 1980s and early 1990s, local transit ridership declined steeply from 19 million to 12 million annual trips. This drop was influenced by economic factors, suburbanization and downtown deterioration, greater car ownership, and the withdrawal of provincial transit funding. Since 1995, London Transit has seen significant ridership growth (up 40% from 1997 to 2003) and improvement in service efficiency and effectiveness, due in part to an innovative fare restructuring program that introduced market-sensitive pricing and enhanced fare media options.

In 2001, transit carried about 7% of peak hour trips in the City of London. Draft targets developed during the development of a new Transportation Master Plan proposed increasing that share to 10% of all trips by 2024. Together with population growth, this would correspond to an increase in transit ridership from just over 16 million to about 28 million annual trips.



University of Western Ontario. London is one of the leading educational centres in Canada, boasting both the University of Western Ontario with almost 29,000 students, and Fanshawe College with over 10,000 full-

time students. The Western campus is self-contained, sitting about three kilometres north of downtown London.

Western is well-served by London Transit routes that fan out in all directions from campus. There are 7,500 parking spaces on campus, and monthly permits cost \$23.95. Undergraduate parking areas, located around the perimeter of the campus, are not used to capacity.

Rationale and objectives

In 1996, London Transit completed a study of potential fare strategies that consulted with students and other local groups. The study suggested that student fares could be reduced, and ridership increased, by introducing a universal transit pass as demonstrated on other Canadian campuses. Other benefits were thought to include simplified fare administration, improved service for non-student passengers, reduced local air emissions, and the chance to cultivate a market of transit users after graduation.

The University Students' Council (USC), which represents undergraduate students, initially became interested in the idea of a universal transit pass as a means to improve the affordability of student transportation options. Other advantages that the USC later identified included improved personal mobility and convenience for students, simplicity of fare payment for transit users, expanded choice of housing to include lower-cost housing opportunities in more remote locations, environmental benefits, lower campus traffic and parking demands.

Actions: Planning

Initial survey. During the 1996-1997 school year, the USC and London Transit initiated discussion about a possible universal transit pass. In the spring of 1997, they commissioned a survey by StatLab, the university's statistical research centre, to estimate the average weekly expenditure of UWO students on London Transit Services and the degree of support for a universal transit pass. Researchers concluded that the average weekly transit expenditure of the 433 students surveyed was about \$5. A majority (59%) of those surveyed supported a universal transit pass, although their opinions of an acceptable price ranged from \$0 to \$200 with a median response of \$75. London Transit agreed that a \$75 universal transit pass fee would enable it to serve higher campus transit demands on a revenue-neutral basis.

Referendum. The strong results of the 1997 survey results led the USC to hold a student referendum in conjunction with the February 1998 student elections. The referendum asked undergraduate students to approve a universal transit pass effective from September through April of each academic year, at an annual cost of no more than \$75. Over 71% of more than 5,000 voters (a 29% turnout) said "Yes" to the proposal. During the referendum campaign, London Transit did not actively promote the pass to students but rather focused on providing information to the students. The USC enabled and assisted the campaigns of both the "Yes" and "No" sides.

Administrative approval. Following student approval, the proposed universal transit pass was approved in March 1998 by the Campus and Community Affairs Committee of the university's Board of Governors. The USC acted as champion of the proposal, on behalf of its constituents. In May 1998 the Property and Finance Committee of the Board of Governors approved the universal transit pass fee for inclusion in the USC activity fees for the next academic year, and the Board of Governors granted final approval the same month.

Actions: Implementation

This section describes key aspects of the Bus Pass at the University of Western Ontario.

Eligibility. The Bus Pass used by Western's 24,000 full-time undergraduate students is effective from 1 September through 30 April each year, and allows unlimited rides during all hours of operation, seven days a week, on regularly scheduled London Transit routes. Part-time students are not eligible and do not pay the Bus Pass fee. Graduate students have a similar program, some details of which are provided in the Results section, below.

All full-time undergraduate students must participate in the Bus Pass program, except those who have a disability making them eligible for paratransit services or who are registered with the Canadian National Institute for the Blind. Students withdrawing from the university or changing to part-time status must ask for refund before mid-September.

Card. The USC issues a special Bus Pass card and a plastic card holder to eligible students. Each card clearly shows the user's unique student identification number, and must be shown to bus drivers together with the user's student photo identification card. The Bus Pass is also used by the USC to give full-time undergraduate students access to other programs including a fixed-rate taxi plan and an extended health plan.

The choice of a unique card was made for practical reasons. The idea of a customized student card was considered, but would have required new student cards to be issued each year. Annual stickers to be attached to student cards presented problems of sticker residue and difficulties swiping the card. The only remaining alternative was to issue a new card, and the inclusion of the user's photo would have been ideal but also very costly and time-consuming to produce. Thus, a unique card bearing the user's student number was the final choice.

Producing customized Bus Pass cards in time for student registration requires the USC to have the Bus Pass cards printed during the summer, leaving off the student identification numbers. Once the university administration is able to supply a list of eligible students, the student numbers are printed on the Bus Pass cards.



The Bus Pass card

Registration. Students pick up their Bus Pass card at a special distribution centre during September, and from the general student information desk later in the year. Students must present their student photo identification card before receiving their Bus Pass. Efficiently distributing so many cards during a limited period (typically 20,000 cards in four days) is a challenge. The special Bus Pass distribution centre offers several queues that are each assigned to a certain range of student numbers. Using this system, the longest wait for users is about 45 minutes.

Replacement of lost or stolen bus passes is considered on a case-by-case basis. Victims of theft are urged to report the incident to both the USC and local police. A processing fee of \$25 is levied for each replacement Bus Pass, and the USC limits each student to two replacements for lost or stolen cards. The USC will also replace damaged Bus Passes that still bear identifiable marks showing the registered user.

Bus passes are not transferable, and London Transit or the USC may confiscate suspected illegitimate passes, and consider their use to be fraudulent and criminal.

Fees. The Bus Pass fee charged to full-time undergraduate students is \$104.75 in 2003-2004, equivalent to \$13.10 a month (versus the regular London Transit post-secondary monthly pass cost of \$64). This amount includes a \$1 charge for USC production, distribution and administration costs.

Fee increases. The initial Bus Pass fee in 1998-1999 was set at \$75, an amount that reflected a preliminary study of expected costs and revenues. The fee was adjusted for inflation to \$79 in 1999-2000. During this period, London Transit measured actual Bus Pass usage and identified the true cost of the required service improvements, leading to a significant fee increase for 2000-2001 that required a student referendum. The new fee of \$95 was approved by undergraduates with 83% support, a larger margin than the initial referendum on a \$75 fee held two years earlier. Since that time, the Bus Pass fee has been linked to the Ontario Consumer Price Index for transportation.

Remittances. The university administration collects student fees with tuition payments at the beginning of the academic year and passes the funds to the USC, which remits about 25% to London Transit in September and 12.5% in each of the following six months.

Service improvements. London Transit made numerous service improvements including extended hours and increased frequencies in response to the increased demands arising from the Bus Pass. The need for changes was identified based on actual ridership, as significant excess capacity (30% to 40% in some cases) on some campus routes was taken up and overcrowding started to occur.

Promotion. Now that the Bus Pass is ingrained as a fact of undergraduate student life, it requires little in the way of special promotion. London Transit places an ad in student orientation material. The USC provides information for inclusion in the academic calendar and registration materials, staffs a booth during the mandatory summer orientation visit for new students, puts posters up at the start of the year and maintains a detailed set of Bus Pass pages on its Web site.

Ongoing planning. Now that several years have passed and the program runs smoothly, communication between the USC and London Transit occurs only as needed.

Monitoring. London Transit and the USC commissioned a follow-up survey of undergraduate students by Statlab in April 1999, toward the end of the Bus Pass program's first year, to determine the nature of any

changes in students' transit use. On a longer-term basis, London Transit can track several aspects of Bus Pass usage on its system. It conducts on-board farebox counts (requiring the driver to hit a key on the electronic farebox every time a student boards) generally once each year. It also conducts comprehensive on/off passenger counts every three to five years.

Renewal. The Bus Pass contract between London Transit and the USC requires renewal every three years. Renewal does not need to be approved by student referendum unless there is a significant change in program design. Increases in the Bus Pass fee do not need to go to referendum unless they exceed the change in the Ontario Consumer Price Index for Transportation.

Results

By all accounts, the Bus Pass has been very successful. It has been extended to both Western graduate students and students at Fanshawe College, with both of these groups paying \$126 over 12 months (\$42 per four-month term). Over 35,000 post-secondary students in the London area now hold Bus Passes.

The follow-up survey conducted toward the end of the first year of the Bus Pass program found that 72% of Western undergraduates favoured the program, an increase from the 59% who said they favoured it in a survey conducted two years earlier. The follow-up survey also found that 53% of students who were already London Transit users before the Bus Pass program reported an increase in their transit use over the year.

The USC was surprised how many students who were initially opposed to the Bus Pass quickly grew to support it and see its value even if they don't use it personally. This phenomenon was illustrated by the results of the second referendum, which received 88% support. The USC feels that, aside from financial savings and improved mobility, students now have more flexible housing options and can pay less for rent in more remote neighbourhoods.

London Transit notes that the large boost in campus ridership due to the Bus Pass (estimated to be about 50% in the first year) provided inertia for the agency to upgrade its services (including 5,600 extra service hours in the first year) and fleet, but also sees other benefits including reduced traffic volume and air emissions on campus, and a reduction in complaints about empty buses. The Bus Pass success story has boosted London Transit's profile among the public and area politicians, and has contributed to an overall 40% increase in London Transit's system-wide ridership from 1997 to 2003.

Parking permits issued by Western still sell out every year, but an increase in undergraduate student population (from 18,000 in 1998 to 24,000 in 2003) has led to a drop in the number of students per parking space. As noted above, parking spaces allocated to undergraduate students do not fill up on a regular basis.

Participants

Students. The USC is responsible for administration of the Bus Pass program. For contractual purposes, it designates one of its full-time employees as USC Bus Pass Administrator, in addition to their regular duties.

London Transit. Management of the Bus Pass program is rolled up with other administrative, promotional and accounting functions.

Media. Western's student newspapers actively reported the facts at each stage of the initial Bus Pass debate, and during discussions over annual fare increases. Editorial opinions have been infrequently expressed but generally supportive.

Resources

Students. The USC Bus Pass Administrator administers the program, but also has other duties including managing the undergraduate extended health plan.

London Transit. Management of the Bus Pass program requires about one-quarter of a full-time staff person's effort. The costs of the service improvements made to meet increased passenger demands are difficult to estimate because they arose from regular route planning processes that also considered demands from other markets.

University administration. The University of Western Ontario's administration contributes no resources to the Bus Pass program.

Timeline

1996-1997. The USC initiates discussions with London Transit regarding a universal transit pass

March 1997. The USC and London Transit commission a survey to identify student travel patterns and interest in a universal transit pass

January 1998. The USC decides to hold a student referendum in conjunction with that year's student elections

February 1998. Referendum held with over 70% support for the Bus Pass

May 1998. The Board of Governors approves the inclusion of a Bus Pass fee in undergraduate tuition

September 1998. First Bus Passes issued to Western undergraduate students

February 2000. Undergraduate student referendum approves a 20% increase in the Bus Pass fee

Next steps

There are no imminent plans to expand or otherwise modify the Bus Pass. There has been some discussion on campus about including part-time undergraduate students, and about making the pass valid for 12 months a year, but neither move is expected to occur for political reasons. Similarly, adding student photos to the Bus Pass card would help to limit abuse and minimize bus drivers' work in checking passes, but the cost and time required to produce photo passes seem to be prohibitive.

Appendix E Case study: Saint Mary's University

Summary

The Saint Mary's University U-Pass was approved by student referendum and launched in 2003. It gives unlimited access to all Metro Transit services in the Halifax area to all full-time undergraduate students, at a cost of \$110 for the eight-month academic year in 2003-2004.

Program participants are identified by a sticker on their student photo identification card, although a separate U-Pass photo card will be issued in 2004-2005. The program is mandatory with very limited exceptions. It is administered by the Saint Mary's University Student Association.

Results have included an approximate doubling of campus transit ridership.

Community and institutional context

Halifax. Halifax is the capital of Nova Scotia, and its population of 360,000 represents 40% of the provincial total. The fast-growing metropolitan area is the 13th largest in Canada, and is forecast to have a population of 450,000 by 2020. The Halifax Regional Municipality was created in 1996 by an amalgamation of four urban and rural municipalities (Halifax, Dartmouth, Bedford and Halifax County).

Metro Transit, an agency of Halifax Regional Municipality, carries about 14 million transit passengers each year (about 40 rides per capita) at a 70% revenue/cost ratio. It carries a relatively high proportion of Halifax commuters to work (about 10%), and is part of the reason that the area has a low rate of commuters who drive (about 68%, among the five lowest of all Canadian metropolitan areas). To ride Metro Transit, post-secondary students must pay the regular adult fare of \$1.75 cash or a \$1.50 ticket. They can also buy a \$51 monthly pass that is discounted from the regular adult cost of \$57.



Ferry operated by Metro Transit (courtesy Metro Transit)

Saint Mary's University. Saint Mary's University is one of six degree-granting institutions in Halifax, and offers a full range of graduate and undergraduate programs. The compact campus is located centrally, adjacent to the city's downtown core. Saint Mary's student population totals more than 8,500, with a full-time undergraduate complement of just over 7,000.

Saint Mary's is directly served by five bus routes. A student survey in 2002 found that close to 20% of students used transit most of the time to get to and from the campus, compared to those who used a car or

walked (each about 35%). Between 25% and 30% of students took transit to campus on any given day. Less than 20% of transit users said they used monthly passes. About three-quarters of students (76%) said they could get to campus by bus.



Saint Mary's University Campus (courtesy Saint Mary's University)

Rationale and objectives

The idea of establishing a universal transit pass at Saint Mary's University arose within the student population due to growing awareness of similar programs elsewhere. Notable benefits for students included a substantial reduction in the cost of using transit, added convenience for occasional transit users such as those living in residence, reduced demands on limited campus parking facilities, expanded housing and employment options for students by making them more accessible to non-drivers, and a better travel alternative for students who have consumed alcohol.

Metro Transit got involved in the U-Pass project as a way to help promote broader sustainable transportation principles. The ability of U-Passes to increase campus transit use by 15% to 35% was good evidence of the program's potential to reduce local traffic and parking demands, and improve air quality.

Actions: Planning

The Saint Mary's University Students' Association (SMUSA) and Metro Transit started discussing the possibility of a U-Pass program in 2000. The talks also involved staff of the Ecology Action Centre, a non-profit organization that promotes sustainable transportation in the Halifax area through its TRAX program.

Initial survey. In fall of 2002, SMUSA conducted a statistically valid survey of Saint Mary's students to quantify travel patterns and determine the level of support for a universal transit pass. The results showed that students gave considerable support to the idea of a mandatory eight-month bus pass for full-time undergraduate students at a cost of up to \$105. About 39% of students were strongly in support, 32% were in support, 12% were opposed and 18% were strongly opposed. Based on the survey results, negotiations were begun to confirm U-Pass terms and conditions that could be subjected to a binding student referendum.

Cost determination. The students' association and Metro Transit agreed that the U-Pass should be a revenue-neutral proposition, and that net transit revenues should not be affected. To the extent that U-Pass fees exceeded previous transit revenue from Saint Mary's students, Metro Transit committed to adding new routes and increasing frequencies that improved service to the campus as much as possible.

Considerable effort was put into calculating baseline transit revenues from Saint Mary's students, to avoid creating the perception that Metro Transit would be making money from the U-Pass arrangement. Based on load counts, fare sales and a passenger survey, Metro Transit estimated that the average Saint Mary's student used the bus seven to eight times monthly before the U-Pass. Experience in other Canadian U-Pass programs indicated that student usage with a U-pass in place could be 10 to 15 times monthly. This projected growth in transit usage by Saint Mary's students would require additional services to be paid for with U-Pass revenues. By adding current student revenues to the expected costs of these additional services, a proposed U-Pass cost of \$110 was determined.

The initial ridership growth projections turned out to be conservatively low. After the U-Pass was in place, Metro Transit observed a ridership increase of 50,000 additional monthly trips and an average student ridership of 14.5 trips monthly.

Referendum. Based on the results of the 2002 survey, the Student Representative Council decided to take the question of a U-Pass to referendum to allow the students to decide. In conjunction with SMUSA elections in February 2003, about 18% of Saint Mary's undergraduate students voted on the issue, more than the 10% turnout required to make the results binding. About 65% of the votes were in support of adopting a U-Pass at the price of \$110 per academic year.

During the period leading up to a binding student referendum on whether to adopt a U-Pass program, SMUSA provided information to students to ensure the best possible understanding of the U-Pass program's conditions and implications, but did not take an official "yes" or "no" position. SMUSA also provided a written explanation of the referendum on the voting booth together with a list of the pros and cons of the program. The Ecology Action Centre did sponsor a "yes" campaign.

Actions: Implementation

This section describes key aspects of the Saint Mary's University U-Pass.

Eligibility. The U-Pass is valid for unlimited access to Metro Transit buses, ferries and accessible paratransit vehicles from 1 September through 30 April of each academic year. All full-time undergraduate students taking three or more courses must pay the U-Pass fee. Part-time and graduate students are not eligible. Students with appropriate Access-A-Bus or Canadian National Institute for the Blind registration cards can have the U-Pass fee waived.

Card. During the first year of operation, the U-Pass has been identified by a sticker on the Saint Mary's student card. Keeping the U-Pass and student identification together would minimize the potential for abuse and is less expensive, but stickers have proven to be problematic—there is limited space on the card and it is difficult to remove one sticker to put the next year's on. As a result, in 2004-2005 Metro Transit will issue a separate U-Pass card.

Registration. In 2003-2004, students showed their validated student card at the Student Centre information desk to have their U-Pass sticker applied. Replacement U-Pass stickers are available for a \$5 fee when a student card has been lost or stolen. SMUSA worked with information technology staff to develop software that facilitates a real-time check of any student's current status to see if they qualify for the U-Pass, and if they have already picked it up or not.

Fees. The mandatory \$110 U-Pass fee is collected with other student fees at the time of initial academic registration. Students who withdraw from school during the fall term may also qualify for a 50% reimbursement, but full-time students who revert to part-time status after the first two weeks of classes retain their U-Pass and receive no refund. Students who start attending Saint Mary's in January, or who move from part-time to full-time status at that time, are charged a \$55 U-Pass fee for the January to April period. The \$110 U-Pass fee is equivalent to \$13.75 a month, representing a discount of \$37.25 a month from Metro Transit's regular student monthly pass worth \$51. Even for students who aren't daily transit users, the U-Pass pays for itself with just one round-trip a week by bus.

Fee increases. After the first year of U-Pass operation, SMUSA may add its direct program costs to the Metro Transit fare requirement to establish the annual SMUSA U-Pass fee payable by each student. By 1 January of each year, Metro Transit will submit to SMUSA its required fare for full-time students during the following academic year. The fare may increase annually at the rate of inflation or less, but greater increases must be approved through a student referendum. It should be noted that in determining a fee for the second year of U-Pass operations, SMUSA and Metro Transit have experienced some disagreement over the quantification of foregone revenues and the cost of new transit services.

Remittances. SMUSA remits U-Pass fees to Metro Transit four times each year. It makes a \$150,000 deposit in October, followed by the balance in three parts (45% in each of November and February, with the remainder plus/minus any adjustments in April). By May 15, SMUSA is responsible for ensuring that the university administration provides Metro Transit with an audited statement of the number of students from whom fees have been collected. By June 15, Metro Transit must provide to SMUSA an accounting of its use of U-Pass fees, identifying any variance from the intended revenue-neutral nature of the program.

Service improvements. Metro Transit estimates that it has added more than \$500,000 worth of new transit services, including more routes and increased frequencies. The operator's ability to make improvements has been somewhat limited by a shortage of buses, a situation that it hopes to resolve by the 2004-2005 year.

Promotion. Metro Transit has produced an information flyer for the Saint Mary's student registration kit, and makes sure that route information is available to students. SMUSA has produced pamphlets, a website, articles in student paper, and uses a U-Pass information booth at open houses.

Ongoing planning. SMUSA and Metro Transit communicate regularly, as required on issues related to transit service and program administration.

Monitoring. Metro Transit is monitoring campus transit ridership using load counts.

Renewal. The three-year U-Pass contract between SMUSA and Metro Transit is valid through the end of the 2005-2006 academic year. Upon completion, a formal evaluation of the program may be conducted by 1 June 2006, at which time the parties may agree to extend the agreement for another three years. Any party wishing to terminate the contract for a subsequent academic year must provide written notice by 15 June.

Results

As discussed above, initial ridership projections for the U-Pass program were exceeded by actual growth. The seven to eight trips a month taken by the average Saint Mary's student before the U-Pass increased to 14 trips

within the first year—representing an increase of 50,000 monthly transit trips by the Saint Mary’s student population. This growth has been accompanied by an extra \$360,000 in revenue for Metro Transit, from a baseline of \$440,000 in 2002-2003, but required service improvements worth an additional \$500,000.

While detailed follow-up surveys of student transit use have not been conducted, about 6,000 of the eligible 7,000 undergraduate students did pick up their U-Pass sticker for the 2003-2004 academic year.

Other benefits of the U-Pass include a reduction in the university administration’s waiting list for parking permits. SMUSA also notes that the U-Pass encourages first-year students living in residence, who may otherwise remain fairly isolated, to get out and explore the city by bus.

Participants

Student groups. SMUSA conducted the initial survey of students, negotiated contractual terms with Metro Transit, distributed passes through its information desk, dealt with students in special situations such as those who changed their registration status, and held meetings with university administrators to keep them informed.

Metro Transit. The agency participated in contract negotiations and produced information materials.

Ecology Action Centre. This non-profit organization promotes sustainable transportation in the Halifax area through its TRAX program. It was involved throughout the U-Pass development process, and acted as a neutral third-party facilitator during negotiations between SMUSA and Metro Transit.

Media. The media did not play a large role in the U-Pass development, although they were generally supportive. There were some articles, particularly in the student newspaper which also acted as a forum for students to express personal opinions on both sides of the debate.

Resources

Students. SMUSA reports that U-Pass implementation required two to three months of heavy work at the beginning of the academic year to coordinate distribution, customer service and so on. Three people were mainly involved, including part-time staff hired to distribute the U-Passes. SMUSA has not yet determined its costs for administering the program, which it will be able to recover directly from students as part of future U-Pass fees. Some portion of these costs may be covered by interest on U-Pass fee receipts, which are collected at the start of the year but remitted gradually to Metro Transit, enabling SMUSA to earn interest on the interim balance.

Metro Transit. Metro Transit’s costs to manage the U-Pass have been absorbed within its general operations. Overseeing initial U-Pass implementation required the equivalent of one full-time staff member, but in future years this burden would likely drop to a one-quarter or one-half time staff equivalent. Other resources include the additional buses and labour required to improve service to the Saint Mary’s campus, worth about \$500,000 over the first year.

University administration. The Saint Mary’s University administration contributes no resources to the U-Pass program.

Timeline

2001. SMUSA and Ecology Action Centre begin to consider a potential U-Pass

Fall 2002. Student survey of travel habits and interest in a U-Pass

February 2003. Student referendum on proposed U-Pass terms and conditions

September 2003. U-Pass implementation with three-year contract

Next steps

With a U-Pass in place at Saint Mary's University, Metro Transit is now looking to bring similar programs to Mount Saint Vincent and Dalhousie University within the next two years, subject to increasing the transit fleet size to accommodate expected ridership growth:

- In November 2003, the Mount Saint Vincent Student Union passed a motion to consider adopting the U-Pass, and has since held discussions with Metro Transit with the aim of implementing a U-Pass in September 2005.
- At Dalhousie University, a survey was conducted to gather general information on student transit use. The Dalhousie Student Union is considering U-Pass implementation for September 2005.

