

REQUEST FOR APPLICATIONS

Commuter Transportation Services Pilot Projects

January 14, 2021

1. Background – Commuter Strategy Project

A significant share of the labour force in Eastern Ontario commutes across municipal boundaries each day, and most do so by private automobile. At the same time as there may be individuals in communities across the region who do not have transportation to get back and forth to work, there are also employers who continue to report real challenges finding employees.

In late 2019, the [Eastern Ontario Leadership Council](#) (EOLC) structured a proposal and sought funding from the Ontario Ministry of Labour, Training and Skills Development (MLTSD) to understand potential demand for commuter-oriented transportation services and support multi-community collaborations to address this type of transportation need. The project includes a component through which multiple stakeholder groups could submit applications for funding support to undertake pilot projects across the region. These pilots would be jointly evaluated by the EOLC and proponents to extract lessons learned and gain insight into ways to improve services for ongoing operation.

2. Purpose of Pilot Projects

As part of the *Commuter Strategy Project* (CSP), the Working Group is inviting applications for community-led pilot projects that will design, implement and evaluate solutions to commuter transportation challenges across Eastern Ontario. The EOLC and its Integrated, *Intelligent Transportation Systems* (i2TS) Working Group anticipates multiple pilot projects to be funded and expects to see different solutions proposed in different parts of the region, tailored to meet the needs of current and potential commuters in a financially sustainable way. The EOLC also encourages applications for commuter transportation services that particularly support essential workers, especially in areas where there are currently no alternatives for those workers (and their employers) other than private automobile.

While the EOLC hopes that proponents will come forward with applications for services that will operate for an extended period of time, there will be an in-region evaluation of all funded projects after six months, to begin the learning process from the pilots. Data and best practices from the evaluation will be shared with pilot project proponents, the EOLC and its funder (MLTSD) as well as with external stakeholders across Ontario and beyond.

3. Total Funding Available

The Commuter Strategy Project has total funding for all projects of between \$100,000 and \$150,000, proposed to be allocated among six to eight projects that are assessed as a) **being operationally viable now** ('developmental' projects will not be considered), with b) **prospects of longer-term financial viability**. Commuter Strategy funding is intended to offset some **upfront costs** (ex. Insurance, marketing costs or minor capital expenditures) or **early operating costs** (before revenues rise to at least breakeven status). Major capital expenditures, such as purchase of vehicles or buildings are ineligible costs).

Proponents should understand from the foregoing that the Commuter Strategy will not likely cover 100 per cent of six-month costs for pilot projects and that the clarity of pilot project budgets will be important to the Evaluation Committee's review of applications. The Evaluation Committee will not use a fixed percentage contribution 'rule' (ex. 20% of total budget) but will consider how best to support upfront costs and/or early operating costs. Proponents are encouraged to highlight these expenses in their budget documentation.

The EOLC also reserves the right to fund projects at different levels based on project specifics. Proponents might expect per project funding to be within a certain range (i.e. \$15,000 to \$25,000) but this range may change based on the EOLC's internal work to maximize the amount of available funds available for pilot project purposes, and the total number of viable project applications. The minimum amount of total funding available for all approved projects is \$100,000.

4. Timeline for Submission of Applications for Pilot Projects

Release of Formal Request for Applications – January 14, 2021

- **Final date for submission of proponent questions about the Request for Applications (RFA) – 5:00 pm EST on January 22, 2021** Questions with respect to individual applications are permitted after the 22nd. The January 22, 2021 deadline is just for questions about this Request for Applications (e.g. clarification on content, deadlines, process). This first phase is to help proponents decide if they wish to participate in the process and if so, understand the types of proposals that are likely to meet with success. Questions should be submitted by email to contact@eolc.info.

Note: By sending a brief email to contact@eolc.info, potential proponents are asked to signal their request for inclusion on circulation of responses to RFA questions This request is to ensure that all proponents are included in any circulated information and to give the Evaluation Committee an idea of how many potential applicants there might be for pilot project support.

- **Final date for responses to questions to be circulated to all potential proponents – January 29, 2021.** Note that the Evaluation Committee reserves the right to hold an information meeting for any/all interested applicants, by Zoom, at approximately the same time as responses are circulated. This would provide an extra opportunity for proponents to ask questions.
- **Deadline for submission of applications – 4:30 pm on February 12, 2021.** Applications must be received by 4:30 pm EST on Friday, February 12, 2021. Applications should be provided by email to contact@eolc.info and should be in PDF form. One or more PDFs as attachments is acceptable. The Evaluation Committee will confirm receipt of all applications to the email address from which the application was received. Proponents are strongly encouraged to send proposals well before the 4:30 pm deadline to avoid difficulties due to internet outages or other technical issues. A ‘heads-up’ email to contact@eolc.info, a few hours before the application is actually sent, is encouraged so that the Evaluation Committee will be alerted to any transmittal issues.

5. Timelines for Evaluation, Notification and Funding Transfers for Pilot Projects:

- **Deadline for evaluation of applications and notification to proponents – February 26, 2021.** The Evaluation Committee will review and assess all applications, prepare and present recommendations to the EOLC's I2TS Working Group, secure funding decisions from the Working Group, and notify all applicants of the outcome of their applications no later than Friday, February 26, 2021. In the interests of time, the Evaluation Committee reserves the right to use either email or telephone (or both) for providing notifications.
- **Target Final Date for approval of applications with Letters of Agreement executed – March 12, 2021.** On the Working Group's behalf, the Evaluation Committee will follow up on the communication of funding notification to discuss and execute a Letter of Agreement (LOA) with proponents. The target date of March 12, 2021 has been established to allow for negotiations specific to each successful application. Note that not all LOAs must be concluded at the same time. The Working Group reserves the right to 'stagger' completion of the LOAs (not as a batch) to allow applicants to proceed on an individualized timeline.
- **Target Timeframe for funding transfers – March 19 to April 23, 2021.** The Working Group anticipates that transfer of pilot project funds will begin no earlier than March 19 and will be completed no later than April 23, 2021. Funding transfers will be tied to successful completion of LOAs, proposed start dates for specific pilot project, and any other terms and conditions negotiated in the LOA.

6. Timelines for Operation and Evaluation of Pilot Projects (Summary Chart at End of This Section)

- **Timeframe for First Six Months of Pilot Projects – March 26 to October 15, 2021.** The Working Group anticipates that all funded pilot projects will begin no earlier than March 26, 2021 and no later than April 15, 2021 to allow for a staggered start to pilot projects and ensure that each project will operate for at least six months before any evaluation begins. The latest end date for the six-month pilot period is expected to be October 15, 2021.

- **Timeframe for Evaluation of First Six Months Evaluation of Pilot Projects – October 16 to November 19, 2021.** The Working Group will carry out collaborative evaluations of each pilot project within the October 16 to November 19, 2021 timeframe. Collaborative means that proponents will be active participants in the evaluation process. The Working Group anticipates that the pilot projects that are the first to begin operation will be the first to be evaluated but the timing will be addressed with individual proponents. Note that the Working Group anticipates regular but not burdensome interaction with pilot project proponents as the pilot project progresses. This may reduce the intensity of evaluation activity at the end of the six-month pilot period and will provide an opportunity for pilot project proponents to show how the EOLC funding was/is being utilized.

Note: the EOLC will be carrying out a separate evaluation of the entire Commuter Strategy project (including but not limited to the pilot project phase), before the end of 2021. This must be submitted to the funder by mid-December of 2021 at the latest.

See summary of pilot project process on the following page...

Summary of Timeline

Stage/Phase	2021									
Formal Release of Request for Applications	Jan 14									
Final Date for Submission of Proponent Questions About the RFA		Jan 22								
Final Date for Responses to Questions To Be Circulated to All Potential Proponents			Jan 29							
Deadline for Submission of Applications				Feb 12						
Deadline for Evaluation of Applications and Notification to Proponents					Feb 26					
Final Date for Approval of Applications with Letters of Agreement Executed						Mar 12				
Target Timeline for Funding Transfers						Mar 19 to April 23				
Timeline for First Six Months of Pilot Projects							Mar 26 to Oct 15			
Evaluation of First Six Months of Pilot Projects								Oct 16 to Nov 19		
Full Evaluation of Commuter Strategy Project										31-Dec

7. Evaluation of Applications for Pilot Projects

To be considered for pilot project support, the EOLC requires all candidates to submit an application (as outlined in a later stage of this RFA). Applicants will see that this application is similar --- but not identical --- to a Request for Proposal (RFP). The major difference between an RFP and this RFA is that the EOLC anticipates multiple successful pilot projects rather than just one RFP “winner”. Note that the Evaluation Committee will also be looking for a range of different types of solutions (e.g. “models”) reflecting the specific conditions/needs in different parts of the region. In addition, the Evaluation Committee will be looking to support pilot projects in multiple parts of the region.

If there are proposals that are similar in geographic location(s) served or in the type of proposed solution, the Committee reserves the right to select only one application from that group. The Evaluation Committee expressly wishes to maximize the extent of learning through the pilot projects --- for other stakeholders in the region as well as for the EOLC and its funder.

Applications received by the deadline will be assessed by consensus using the scoring system outlined on the following page. Subject to the notations in the scoring chart, all criteria will be weighted equally. A minimum score of 50 must be obtained to be considered for funding.

After the application deadline has passed, all submissions will be reviewed and evaluated by an Evaluation Committee so designated by the EOLC’s I2TS Working Group. Recommendations will be made to the Working Group regarding which applications should be funded and for what amount. The Evaluation Committee will also advise the Working Group if there are applications that are not of sufficient quality to warrant funding support. The Working Group will be advised of any and all applications received by the deadline, regardless of evaluation and recommendation.

Criteria (all criteria will be weighted equally but the Evaluation Committee reserves the right to disqualify applications that do not address criteria 1 or 2.)	Assessment (0 to 10 where 0 is the lowest and 10 is the highest)
1. Description of the commuter transportation challenge to be addressed by the proposed pilot project (target groups and geographic areas; impact of challenge on economy and labour market. <i>Note: the proposed project must cross municipal boundaries (ex. City-county; two counties)</i>)	
2. Quality and extent of evidence to substantiate the existence of the challenge and for demand and service design analysis	
3. Explanation and depth of understanding provided for the proposed service model, and how the proposed model meets the needs of the identified target groups	
4. Depth of relevant experience in similar projects, or in transportation services generally and/or in addressing labour market issues	
5. Description of operational plan (ex. Who will provide the service, key characteristics describing service plan, specific service targets, service areas and routes if applicable)	
6. Quality of marketing and promotional plan	
7. Quality of financial plan and first-year budget	
8. Evidence of operational and financial partnerships and other types of cross-boundary collaborations (including associated governance expertise)	
9. Overall quality and clarity of the application	
Total	
Check box to indicate that mandatory requirements page is complete and attached/submitted	

Once the Working Group has considered and made decision(s) on the Evaluation Committee's recommendations, proponents for all pilot project proposals will be notified --- successful or otherwise. Successful proponents will be required to sign a Letter of Agreement before funding can be released. Note that the proponent's proposal will be attached to the Letter of Agreement as an appendix. The Letter of Agreement will also include a set of mandatory conditions (outlined in this RFA); these conditions include a waiver releasing the Eastern Ontario Leadership Council and their agents from any liability associated with the pilot project.

Commuter Transportation Services Pilot Project Application

Proponents making application to the EOLC for pilot project funding support are strongly encouraged to include the following content in their submission. While there is no maximum number of pages for the submission, proponents are encouraged to be as succinct and clear as possible with additional detail/supporting documentation included as appendices.

Proponents are encouraged to avoid thinking that extensive detail "in the application boxes" enhances prospects for success. Instead refer to the Guidance descriptions following each 'box' and focus on providing clear succinct responses to each section and put supporting detail in the appendices.

The actual application form starts on the following page...

A. Summary of Project and Name

Project Name _____

Lead Proponent _____

Contact Person _____

Contact Person Email Address _____

Summary of Project (four or five sentences maximum; this is just to give the Evaluation Committee the context of your submission):

Guidance for completing this section of the application:

Provide a description and overview of your proposed project. Include details such as the name of the company/companies and other organizations involved, the location of the places of work, the number of employees that could potentially use the service. Add any other details to provide a context for the project.

You may delete the preceding guidance before submitting your application.

B. Description of Commuter Transportation Challenge to Be Addressed

Commuter Transportation Challenge to Be Addressed

Transportation Infrastructure and Services

Impacts of Challenge on Employers, Local Regional Economy and on Commuters

Guidance for completing this section of the application:

Outline the commuting challenges faced by employers, the workforce or other members of the labour force who are seeking work. Describe the existing network for transportation (existing roads or highways, rail or air infrastructure available in the target geographic area as well as any transportation services currently available.

Provide a description how inadequate commuter transportation might be impacting both employers and members of the workforce. Examples: impacts on recruitment/talent attraction and/or retention, costs of recruitment and/or replacement, intensity of recruitment and time to fill positions, inability to maintain staffing for production levels, inability to get back and forth to work for which workers are qualified. Provide information on any employer or employee surveys or expressions of support for the proposed pilot project.

Outline how these transportation challenges translate into business impacts for the employers as well as economic impacts for the community. Describe how the solution will contribute to the local or regional economy and/or provide a catalyst for both short-term economic recovery and ongoing economic benefits for the area.

You may delete the preceding guidance before submitting your application.

C. Evidence that Commuter Transportation is a Barrier to Efficient Labour Market Operation

Evidence Supporting Challenge Description and Solution Options

Sources of Information, Data or Solution Ideas

Guidance for completing this section of the application:

Provide an overview of the research that has been undertaken to arrive at the proposed solution, and any data or other information (evidence) that suggests the proposed solution is a good one and that there is some prospect for medium-long term success.

Note anyone, including transportation services experts/consultants, operators, employers/associations with whom you have been in touch to gather information and/or discuss possible solutions. Outline any articles, studies or other research that has been reviewed to help arrive at the proposed solution.

You may delete the preceding guidance before submitting your application.

D. Demand and Service Design Analysis

Analysis Undertaken to Determine Potential Demand

Analysis in Support of Commuter Transportation Service Design

Guidance for completing this section of the application:

In this section, describe the data/information gathered and analysis completed to support the solution proposed in this application. This includes but may not be limited to:

- a) place of work/place of residence analysis of commuters;*
- b) indications of the number of commuters/persons accessing employment who will use the service; or*
- c) survey results.*

Presentation of data in either chart or map form is acceptable.

You may delete the preceding guidance before submitting your application.

E. Transportation Services and/or Labour Market Experience

Experience Designing, Operating or Funding Transportation Services

Experience in/Understanding of Labour Market Issues

Other Experience Deemed Relevant to Pilot Project Success

Guidance for completing this section of the application:

Provide a description of experience that the lead **proponent** or **partners** may have with a similar project in the past. This experience can be either directly or indirectly related to a transportation service, to the efficient operation of labour market(s) or to the importance of labour markets to local economies and/or employer success. Examples could be operational experience with a municipal transit service, operating job fairs for employers, direct roles in Human Resources functions.

This section could also include ways in which the proponent(s) may have engaged with employers or employees on projects to address workplace issues (ex. Internal training or development programs, support for employee health and wellness) Interorganizational partnerships and transportation planning and/or operational experience.

You may delete the preceding guidance before submitting your application.

F. Proposed Solution to Commuter Transportation Needs

Description of Model/Solution and Services to Be Offered

Operator(s) or Other Third Parties Engaged

Service Design and Logistics

Guidance for completing this section of the application:

Describe the proposed model or solution to the specific commuter transportation challenge identified, including the mode(s) of travel to be used singly or in combination, whether new services will connect to/extend existing services to address currently unmet needs.

Describe the design of the service (routes, timing, on demand/scheduled etc) and explain why this is the best design for the challenge being addressed. Demonstrate how the particular target groups or geographic areas will be served by the proposed solution.

Identify any third parties that will be part of the service and the role(s) they will play. Identify any other infrastructure required to make the solution work and note if these project components have been confirmed. Explain how commuters will access the proposed service.

You may delete the preceding guidance before submitting your application.

H. Marketing and Promotion

Profiles of Anticipated Service Users

Marketing Outreach and Promotion Tactics

Timing and Duration of Marketing Efforts

Handling Enquiries and Signing Up Clients

Customer Satisfaction Tracking

Guidance for completing this section of the application:

Describe the most likely users of the proposed service --- whether commuters themselves or employers --- and how the service design has been tailored to address their needs.

Lay out the tactics (media, techniques) to be used to bring the pilot project to the attention of these users.
Explain the pricing model(s) to be used (ex. Per trip fare, subscription, per trip subsidy etc.)

Describe when and for how long particular marketing efforts will take place and how the operations team will handle enquiries and encourage potential employers and riders/users to sign up.

Note any plans to monitor 'customer' satisfaction, identify and enact improvements within the first six months of the proposed service.

You may delete the preceding guidance before submitting your application.

I. Pilot Project Management

Description of Governance Structure

Partnerships, Collaborations and Senior Management Support

Description of Operational Management, Roles and Responsibilities

Guidance for completing this section of the application:

Provide an overview of the governance structure for the project (ex. Lead organization, integrated into existing organization, financial management, project accountability and evaluation), and how the pilot project will be managed both during and after the pilot phase and after the pilot project. If the pilot project has multiple partners, explain how partners participate and the composition of any committee/forum for shared decision-making.

Outline the support for this project from senior levels of the lead organization including potentially the CEO/CAO or General Manager/Executive Director. Provide a letter or email confirming that this support includes management resources to be dedicated to this pilot project during the pilot project. In addition, note any partnerships, collaborations or subcontracting arrangements that may be in place to deliver a successful project. Letters of support may be included as an appendix to the submission or attached to the transmittal email.

Describe how day-to-day operational management will be handled, including pilot project leadership, and major operational roles (ex. operational oversight, marketing and promotion, customer relations, financial management, ongoing evaluation and making any necessary changes to the system.)

You may delete the preceding guidance before submitting your application.

Mandatory Requirements:

(include a completed copy of this page with your application)

Proponents should check the boxes beside each mandatory requirement and initial each one to signify understanding of and agreement with these requirements. The completed mandatory requirements form (this page) must be included in/attached to the formal application.

- Ability and willingness to sign a waiver releasing the EOLC from liability for any/all risks associated with the pilot project**

Initial: _____

- Ability and willingness to implement required protocols related to COVID-19 health and safety**

Initial: _____

- Ability and willingness to ensure that any and all services offered will be provided by qualified personnel and within the legal and other regulations associated with provision of passenger transportation services in the Province of Ontario**

Initial: _____

- Ability and willingness to participate in an evaluation of the pilot project (first six months)**

Initial: _____

Initialed by: _____

Organization: _____

Role/Title/Position _____

Additional Background:

Ability and Willingness to Participate in Pilot Project Evaluation

All funded pilot projects will be evaluated by the EOLC as part of the funding agreement with the Ministry of Labour, Training and Skills Development (MLTSD). Acting as a representative of the EOLC, the Project Coordinator will be in touch with funded projects, to track pilot projects' progress, at the beginning of the pilot phase (six months) and no less frequently than every 60 days as the pilot unfolds,

After six (6) months, the Project Coordinator will work with project proponents to undertake a formal (written) evaluation. The formal evaluation will be shared with the funder (MLTSD) with a summary posted in the public domain for the purpose of helping other communities learn from Eastern Ontario's efforts. Proponents will be required to share basic statistics associated with their pilot project and will be able to view and comment on the formal evaluation and summary before they are shared with others.

The evaluation of the pilot project at the six-month mark will include but may not be limited to these criteria:

- Ridership/User volumes, as compared to pre-launch targets and growth projections
- Stakeholder satisfaction information (from employers, riders/commuters and potentially other stakeholders with direct involvement in the pilot project)
- Evidence of pilot project's contribution to addressing a commuter transportation challenge, economic recovery and/or efficient operation of the local/regional labour market
- Overall financial performance over the first six months, in comparison to projection
- Degree to which proponents learned and adapted (if required) throughout the six-month pilot period
- Quality of governance, operational and financial management, including being able to sustain partnerships or collaborations that were the basis for pilot project design
- Ability to articulate lessons learned and/or best practices that would be useful to others seeking to address commuter transportation services.

Note that the EOLC will be responsible for providing the funder with a consolidated report on all pilot projects, as part of a comprehensive project report.