

## Universal Transit Passes in Canada

### Organizations

University of Victoria (in association with BC Transit)

University of Western Ontario (in association with London Transit Commission)

Saint Mary's University (in association with Metro Transit)

### Status

Ongoing, started in 1998 (University of Western Ontario), 1999 (University of Victoria), 2003 (Saint Mary's University)

### Overview

*University of Victoria* — The 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.

*University of Western Ontario* — The 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.

*Saint Mary's University* — The 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.

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### Resources

- Canadian Urban Transit Association — U-Pass Toolkit ([www.cutaactu.ca/pdf/U-PassToolkit.pdf](http://www.cutaactu.ca/pdf/U-PassToolkit.pdf))
- University of Victoria ([www.uvic.ca](http://www.uvic.ca))
- University of Victoria Students' Society ([www.uvss.uvic.ca](http://www.uvss.uvic.ca))

- BC Transit ([www.bctransit.com/regions/vic](http://www.bctransit.com/regions/vic))
- University of Western Ontario ([www.uwo.ca](http://www.uwo.ca))
- University Students' Council, University of Western Ontario — Bus Pass information ([www.usc.uwo.ca/buspass](http://www.usc.uwo.ca/buspass))
- London Transit Commission — Bus Pass information ([www.londontransit.ca/passes.htm](http://www.londontransit.ca/passes.htm))
- Saint Mary's University Students' Association ([www.smusa.ca/upass.php](http://www.smusa.ca/upass.php))
- Metro Transit — U-Pass information ([www.region.halifax.ns.ca/metrotransit/schedules/Upass.html](http://www.region.halifax.ns.ca/metrotransit/schedules/Upass.html))

## Introduction

### The challenges of campus transportation

At a time of increasing financial pressures and heightened competition among institutions, many Canadian universities and colleges are also tackling a new and difficult question: How to make campuses, and campus life, more sustainable? Canada's cities and the nation as a whole face a similar challenge. And at all levels—from campus to country—our travel choices will play a key role in determining how sustainable our future will be.

Indeed, campus transportation is an emerging issue throughout North America. Although the nature of campuses varies widely—from old to new, from downtown to the suburbs, from compact to low density—the challenges are remarkably similar:

- **Expanding enrolments** stress the capacity of older buildings, and add new passengers and vehicles to roads and intersections, parking lots and transit services on and around campus.
- **The drive to erect new, state-of-the-art facilities** is causing administrations to examine how their lands are used, and in many instances to replace parking lots—space for cars—with buildings for teaching and research—space for people.
- **A growing level of auto ownership** in society and among youth gives many students the choice of driving to school, an option that simply didn't exist for many students when their campuses were originally planned and built.

In short, the pressure to deliver quality education with finite resources is competing with the pressure to house more people, more of whom would like to bring their cars with them. The solution that appears obvious to some people—building more parking lots—is frequently impossible due to lack of space and/or lack of funds. Parking lots take a lot of room, are deceptively expensive to build, and the revenues they generate rarely make up for

their initial cost. The solution that many campuses are turning to—and the one that best supports the goal of financial, social and environmental sustainability—is public transit.

Canadian campuses are inevitably major hubs for public transit demands and services within their communities. Universities and colleges house thousands of people with active lives and irregular schedules, and whose financial priorities place tuition, books, rent and food ahead of getting around. Canadian transit systems have responded to this reality by supporting the travel needs of university students. Particularly in smaller cities, students are a major transit market.

But, as with virtually all transit markets, the cost of serving students exceeds the revenues they bring. Improving transit service for students, while a desirable goal, is often beyond the means of transit systems and the communities that run them. Over the last two decades, huge decreases in provincial and federal transit funding have been accompanied by growing budget pressures on local governments. Service cuts and fare increases are now the unfortunate rule, rather than the exception. Canada's public transit systems, like its universities and colleges, are under great strain.

### The U-Pass response

In response to these challenges, the transit industry is looking for new ways of doing business. And low-cost strategies that attract new riders, without abandoning traditional markets, are the goal. One hot area of innovation is pricing—varying fares according to the needs and characteristics of different markets. To some extent, fare innovations have been helped by new technologies. Magnetically encoded cards and electronic “smart cards” make it viable to offer a wide range of customized fares without making life impossible for bus drivers who would otherwise have to monitor an impossible variety of tickets, tokens and cash payments.

Not surprisingly, Canada's post-secondary students—who have a great stake in the simultaneous challenges to both

education and public transit—have shown creativity and initiative in coming up with a solution. More and more, they are proposing, negotiating and implementing a program known as the **universal transit pass**—or to some, the U-Pass. General awareness of U-Pass programs has been spreading for several years, helped along by the Internet and better communication among student councils and other campus groups.

In general, U-Passes are mandatory social programs similar to public health or pension plans—all students pay a fee that enables them to take transit at no added cost throughout the school year. U-Passes work only because they require all members of a student population to participate—hence the term “universal”. By redistributing the costs of providing campus transit services from a smaller group to a larger one, per-capita costs decline. While transit users stand to benefit the most, because their travel costs decline without requiring them to do anything differently, many other groups also benefit.

Dozens of North American colleges and universities (more than 60, by one count) have universal transit pass programs. In Canada, post-secondary institutions in 12 communities have them, including:

- Calgary, Alta. — University of Calgary, Southern Alberta Institute of Technology, Bow Valley College, Nazarene University, Alberta College of Art and Design
- Guelph, Ont. — University of Guelph

- Halifax, N.S. — Saint Mary’s University
- Hamilton, Ont. — McMaster University
- Kamloops, B.C. – University College of the Cariboo
- Kingston, Ont. — Queen’s University, St. Lawrence College
- London, Ont. — University of Western Ontario, Fanshawe College
- North Bay, Ont. — Nipissing University, Canadore College
- Peterborough, Ont. — Trent University
- St. Catharines, Ont. — Brock University
- Vancouver, B.C. — University of British Columbia, Simon Fraser University
- Victoria, B.C. – University of Victoria, Camosun College

While some of these programs have been in place for several decades, in most instances they are recent responses to current challenges. This case study takes a closer look at three representative examples—the University of Victoria, the University of Western Ontario, and Saint Mary’s University—to see how they work, how they got up and running, what challenges were overcome, and what other campuses can learn from the experience.

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## Summary of key findings

### U-Pass benefits

U-Pass programs at the three institutions examined in this case study have proven to be win-win-win-win programs. That is, they have had positive impacts on four key groups—students, the university community, the transit system, and the community at large. Many of the major anticipated or observed benefits are shared among different institutions, as summarized in the following points (note that V = Victoria, L = London, H = Halifax).

#### Student benefits

- Creation of a low-cost student transportation option—between \$13 and \$14 a month compared to regular transit passes at \$51 to \$64 a month [V, L, H]
- New transit revenues can fund improved services meeting the specific needs of post-secondary students [V, L, H]
- Improved student mobility, indicated by the growth in campus ridership after U-Pass implementation:

- An increase from 31% to 51% in the proportion of students taking transit [V]
- A first-year boost in campus ridership of about 50%, and a three-year increase in city-wide transit use of 20% [L]
- An increase in average student transit use from 7 to 14 trips a month [H]
- A simple and convenient way for occasional transit users, such as students in residence, to run errands or explore the city they live in [V, H]
- Offers a safe and reliable travel choice for those who consume alcohol [V, H]
- Improves low-cost housing options by making it easier to live further from campus [L, H]

#### University community benefits

- Support for overall campus objectives to reduce auto travel and air pollution [V, L]
- Fewer parking permits sold, or a shorter waiting list to buy a permit [V, L, H]
- Campus lands can be used for new buildings or greenspace instead of parking [V]

### **Transit system benefits**

- Utilization of mid-day and evening routes increases [V]
- Transit unions pleased by the need for new drivers to improve service [V]
- Ridership increase provided inertia to upgrade the bus fleet [L]
- Fewer complaints about empty buses in operation [L]
- Improved transit system profile among the public and area politicians [L]
- More students may continue to use transit after graduation [L]

### **Wider community benefits**

- Lower traffic volumes and air emissions [V, L, H]
- Improved transit services offer better mobility for non-students [V, L]
- Less illegal parking in residential areas around campus [V]

### **U-Pass challenges**

The three examples presented in this case study show that U-Pass implementation is not easy. When compared to the benefits of U-Pass programs, the challenges are more variable and harder to foresee.

The main implementation challenges documented in this case study lie in several areas: contract negotiations, program management, getting students on board, getting the university administration on board, getting the transit system on board, winning a referendum, and developing new transit services to meet growing demands. Challenges observed at the three studied institutions are summarized in the following points (note that V = Victoria, L = London, H = Halifax).

#### **Negotiating a contract**

- Developing the details of a three-way financial partnership, when the students and transit system are joined by the administration at the negotiating table [V]
- Developing a clear and mutual understanding of the term “revenue neutral” as a basis for negotiating U-Pass fees and new transit services to be funded [H]

#### **Managing the program**

- Working out the details—who does what to keep the program running, what the pass looks like, how to distribute it [V, L]
- Deciding on a fair and consistent basis who to exempt from the U-Pass program, on a voluntary basis [V, H]
- Managing the substantial time commitment from the student association in the first year [H]

### **Getting students on board**

- Building support among students who are not regular transit users [V]
- Building support for a new program that increases student fees [V]
- Assuring students that the U-Pass fee is fair to them, and is not simply a “cash grab” by the transit operators [L]
- Maintaining support within the student government when elected officials change every year [H]

### **Getting the administration on board**

- Assuring the university administration that current and potential students will not be discouraged by the increase in fees [L]

### **Getting the transit system on board**

- Overcoming initial reluctance of the transit system to introduce a new fare program [L]
- Addressing transit system concerns about recovering sufficient revenue to pay for required new services [L]

### **Holding a referendum**

- While conducting the referendum at the same time as student elections is needed to maximize turnout, the opportunity comes only once a year and timing is not flexible [V]
- The need to follow a successful referendum with administrative approval reduced the effective amount of time available to resolve program details before September [L]

### **Transit operations**

- Transit system’s ability (in terms of available staff and fleet) to carry unexpectedly high volumes during midday periods and evenings as well as rush hours [V, L, H]
- A decline in service levels after initial implementation, due to cuts in government funding for transit, created resentment among students [V]
- Difficult for students to stay on top of transit service and ridership changes, thus remaining comfortable with value received for U-pass fee [H]

### **Lessons learned**

This section summarizes some of the valuable wisdom offered by U-Pass program participants, representing both student and transit perspectives (note that V = Victoria, L = London, H = Halifax).

#### **Overall**

- The U-Pass works for students because it’s affordable, simple, convenient, environmentally sound and sustainable. [V]

- The U-Pass is a win-win situation that benefits both students and the transit system. [L]
- The U-Pass requires a leap of faith and it can be hard to get the program started—but once it's running, everyone sees the benefits. [L]
- While some students will always resist higher fees, most will quickly adapt and recognize its excellent value. [L]
- The program is more successful than expected, and collaboration has been the key. [L]
- The U-Pass positively reinforces transit's role in the community. [L]
- An increase in campus ridership of up to 50% or more is likely. [V, L, H]
- The process of putting the U-Pass in place can improve relations between the student council and the transit system. [L]
- It is important to have a good steering committee guiding the U-Pass implementation. [V]
- Launching the U-Pass concurrently at more than one school could make program development efforts more efficient on a per-student basis. [H]
- Putting the U-Pass in place will take no less than one year but probably about two years. [H]

### **Building support**

- Be prepared for opposition. [V]
- It is important to have a team of committed and well-informed students to help build support among other students. [V]
- The program must market itself to non-transit users, so that car drivers feel they benefit too. [V]
- Getting support from both the student society and the university administration is critical. [V]
- While the university administration was worried about increasing student fees, solid statistical research complemented the positive referendum results in helping to demonstrate high levels of student support. [L]
- Campus and community media were crucial to building support during the referendum campaign, and students made natural and effective media spokespeople. Don't underestimate the benefits of using local media to spread your message. [V]
- The referendum campaign should promote the "big picture" and various benefits of the U-Pass, rather than just debating the issue of some students not directly benefiting from the pass. Point out the many other programs that have mandatory fees even though not everyone benefits directly. [L]

### **Referendum**

- Time the referendum to happen at the same time as student elections—it guarantees that candidates will stake a position, the issue will be debated, and voter turnout will be reasonable. [V]
- Having the student council be non-committal, or at least fund "Yes" and "No" campaigns equally, can help to provide some neutrality. [L]
- The referendum question phrasing is critical to make the U-Pass program efficient. The question should avoid specifying a precise cost and requiring a new referendum for each annual fee increase. It's a better idea to index the U-Pass fee to inflation or some local indicator like the price of a regular adult monthly transit pass. [V]

### **Contract**

- It is never too early to start discussing the terms of the U-Pass contract. Ideally, key issues should be worked out before the referendum. Allow time to research other existing U-Pass agreements. [H]
- Having good negotiators on all sides, as well as the assistance of a neutral facilitator, can make the process more efficient and the final contract more transparent. [H]
- Where the U-Pass fee is directly linked to ridership, revenues and costs for campus transit services, the contract should define those figures and identify how they are to be assessed in future. However, this can be quite a challenge and some other mechanism for setting the U-Pass fee should be considered. [H]
- Establish a clear mutual understanding that the U-Pass fee is not negotiable once it has been set. [H]
- Take care to estimate future enrollment accurately, to ensure adequate transit service. [H]
- Even if the university administration is not directly involved in funding the program, involving them in the negotiations will make it easier to initiate future discussions about a possible U-Pass subsidy. [H]

### **Program design and management**

- It's important to examine technical details, such as whether technologies that can be used with the existing student card will work with the farebox system. [V]
- A unique U-Pass card showing the user's student number can be used for access to other student programs, but all programs using the card must have the same eligible target audience. [L]
- It is easier to make the rules for U-Pass exemptions the same as for other student fees, as much as possible. [V]

- The inability of students to opt out of the U-Pass program must be made very clear, particularly to students who live out of the transit service area. [H]
- The student association and transit system need to create an ongoing forum for discussion of transit service issues. [V]
- Understanding how transit systems are funded can help students to avoid worrying that transit is “making a

profit”, and to appreciate that future transit service levels cannot be guaranteed. Students can help by working with their transit operator to lobby for better government funding. [V]

- While changeover within any student group is inevitable, student councils should strive for some kind of continuity to avoid each new executive wanting to re-examine issues that have already been settled. [H]

## Example: University of Victoria

### 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 the 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.

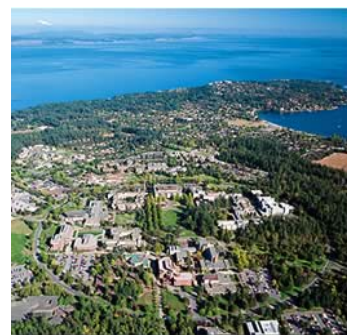


*BC Transit double-decker bus (courtesy BC Transit)*

**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 front 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 student 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 and the timing of holidays and exam periods. BC Transit drivers and operations staff also regularly report on street-level service issues that may 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 travel 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 Student Association 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' 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.

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## Example: University of Western Ontario

### 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-assessed 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.

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## Example: Saint Mary's University

### 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.