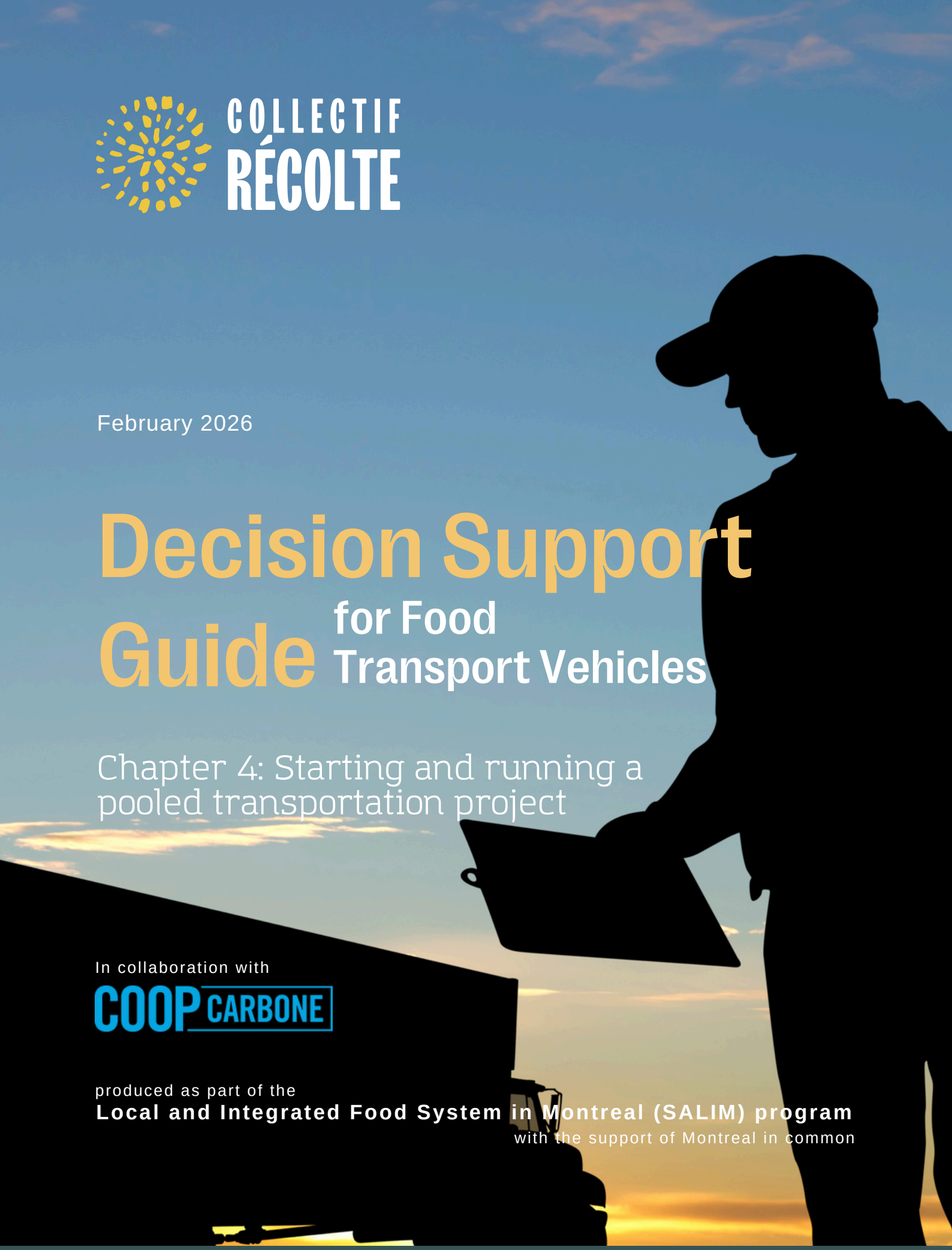
COLLECTIF RÉCOLTE

February 2026

# Decision Support Guide for Food Transport Vehicles

## Chapter 4: Starting and running a pooled transportation project



In collaboration with

COOP CARBONE

produced as part of the
**Local and Integrated Food System in Montreal (SALIM) program**
with the support of Montreal in common

# TABLE OF CONTENTS

# TABLE OF CONTENTS

# LIST OF ABBREVIATIONS

| | |
|---|---|
| **B2C** | **Business-to-consumer** |
| **CDC** | **Community Development Corporation** |
| **CILCAD** | *Centre d'innovation en logistique et chaîne d'approvisionnement durable* **– Centre for Innovation in Logistics and Sustainable Supply Chain** |
| **CNESST** | *Commission des normes, de l'équité, de la santé et de la sécurité du travail* **– Commission on Standards, Equity, Health and Safety at Work** |
| **COCo** | **The Centre for Community Organizations** |
| **Conseil SAM / CSAM** | *Conseil du système alimentaire montréalais* **– Montreal Food System Council** |
| **CQCM** | *Conseil québécois de la coopération et de la mutualité* **– Quebec Council for Cooperation and Mutual Aid** |
| **CRAAQ** | **Quebec Reference Centre for Agriculture and Agri-Food** |
| **CRM** | **Customer Relationship Management** |
| **CSMO-ÉSAC** | *Comité sectoriel de main-d'œuvre de l'économie sociale et de l'action communautaire* **– Sectoral Committee on Labour for the Social Economy and Community Action** |
| **CUMA** | **Agricultural Equipment Sharing Cooperative** |
| **CUMO** | **Shared Labour Cooperative** |
| **GES** | **Greenhouse gases** |
| **kWh** | **Kilowatt-hour** |
| **MAMS** | *Mutuelle d'approvisionnement des marchés solidaires* **– Mutual Supply Cooperative for Solidarity Markets** |
| **MAPAQ** | *Ministère de l'Agriculture, des Pêcheries et de l'Alimentation du Québec* **– Quebec Ministry of Agriculture, Fisheries, and Food** |
| **NPO** | **Non-profit organization** |
| **SAAQ** | *Société de l'assurance automobile du Québec* **– Quebec Automobile Insurance Corporation** |
| **SaaS** | **Software as a Service** |

# LIST OF ABBREVIATIONS

| | |
|---|---|
| **SALADE** | **Local, Accessible, Sustainable and Economical Food System** |
| **SALIM** | **Local and integrated food system in Montreal** |
| **TIESS** | *Territoires innovants en économie sociale et solidaire* **– Innovative territories in social and solidarity economy** |
| **TMS** | **Transportation Management System** |
| **UPA** | ***Union des producteurs agricoles*** **– Agricultural Producers Union** |
| **WMS** | **Warehouse Management System** |

# ABOUT THIS GUIDE

The goal of this guide is to support community organizations and social economy enterprises in their transportation projects, with the aim of facilitating the distribution of fresh, healthy, local food, particularly to vulnerable populations.

Published chapter by chapter, this evolving publication guides you through every stage of your transportation project, from assessing your needs, to selecting your vehicle, to the steps required to initiate and operate a shared transportation project.

This guide has been created as a means of sharing the lessons learned about shared transportation from the Local and Integrated Food System in Montreal (SALIM) program. To ensure that its content is tailored to the needs of our partners, we conducted a survey in the spring of 2023 to better understand the technical specifications sought after when purchasing a truck. Our support for the CDC du Plateau-Mont-Royal in getting the SALADE project off the ground and the completion of a shared delivery vehicle pilot project in the West Island of Montreal within L'Aube Food Hub involved extensive research and discussions with insurers, dealers, and companies specializing in the transportation of goods.

### Would you like support for a pooled transportation project?

Collectif Récolte is a social enterprise that leverages collective intelligence and community mobilisation to catalyze solutions for local and sustainable food practices.
We envision a just food ecosystem that supports thriving local economies, healthy communities and resilient natural environments.
We support changemakers in a variety of initiatives and approaches across Quebec. We provide support based on your needs and the achievements you have already made.

Discover our range of services!

## Chapter 4 - Starting and running a pooled transportation project

This chapter provides practical support to food system stakeholders in implementing a shared transportation project. It sets out a structured approach, covering everything from needs assessment to initial testing. Key elements addressed include partner mobilization, shared governance, the role of shared drivers, and logistical considerations such as insurance, charging stations, etc. This chapter also presents essential tools for the smooth running of shared transportation, including booking calendar, communication between users, fixed and variable cost allocation calculators, journey sharing platforms, and a model rental agreement. Concrete examples and ready-to-use templates provide project leaders with the necessary resources for each stage of deployment.

From the same publication:

**Chapter 1: Estimating transport costs**

The first chapter gets readers thinking by addressing key questions such as “Do I need a refrigerated truck?” or “Should I buy or lease a truck?” Suggested answers to these questions are provided, comparing the different options. The chapter concludes with a checklist of criteria to consider, enabling readers to assess their needs and make a more informed choice.

**Chapter 2: Buying a truck**

The second chapter deals with buying the truck and covers topics such as technical specifications, the pros and cons of popular truck models, subsidies and financing, and regulations. It concludes with a ready-to-use questionnaire to facilitate the purchase process at the dealership.

**Chapter 3: Various pooled transportation models**

Chapter 3 aims to mobilize and inspire actors in Quebec’s food systems who wish to explore different transportation pooling models by presenting the options available, the advantages and the challenges. To do so, it draws on a few examples of pooled transportation already in place in Quebec. The information in the main examples has been reviewed and validated by the project leaders cited.

**Chapter 5: Evaluating the effects and impacts of a pooled transportation project**
(coming soon)

The final chapter of this guide will provide project leaders with tools to measure the concrete impacts and benefits of their pooled transportation initiative. It will present methods for evaluating the economic, environmental and logistical impacts of the project, including time and cost savings, reductions in greenhouse gas (GHG) emissions, and volumes of food transported. The chapter will also address the importance of collecting field data and consulting with the various groups involved, such as producers, organizations and drivers. Maps, calculation grids, and specific indicators will enable readers to document and analyze the effects of their approach.



**Guide reference:** Collectif Récolte and Coop Carbone (2026). *Chapter IV - Starting and running a pooled transportation project. In Decision Support Guide for Food Transport Vehicles.* SALIM program.
https://ressources.recolte.ca/en/ressource/decision-support-guide-for-food-transport-vehicles/

This publication was produced by Collectif Récolte and Coop Carbone as part of the Local and Integrated Food System in Montreal (SALIM), a multi-partner program funded by Montreal in common.

Montreal in common is a community of innovation led by the City of Montréal and financed by the Government of Canada as part of the Smart Cities Challenge.

CHAPTER 4

# STARTING AND RUNNING A POOLED TRANSPORTATION PROJECT

**Want to launch a pooled transportation project but don't know where to start?**

**This guide outlines the steps you need to take and provides several tips for starting and running a pooled transportation project.**

**Note to readers:** The lessons learned, tools, and suggestions in this chapter are based on Coop Carbone's and Collectif Récolte's experiences supporting their partners in the field. Some interpretation may be involved, and the information presented does not claim to cover all the realities experienced in every context. The information presented reflects the state of knowledge at the time of publication. This information is subject to change depending on various factors, including conditions on the ground, the emergence of new shared logistics projects, market conditions, technological advances, and legislative and regulatory changes.

The partners responsible for the projects mentioned in the boxes have verified the sections relating to their projects in order to ensure the accuracy of the information provided.

This guide is intended to be an evolving support tool. Readers are encouraged to adapt it to their needs while referring to it.

## Experiences on which this guide is based

The Collectif Récolte team supported the implementation of three pooled transportation projects through the SALIM program. The team assisted with the launch, the establishment of collective governance, and the implementation of operations management tools for:

- a shared delivery vehicle for L'Aube Food Hub – from 2022 to 2025.
- two shared transportation projects to meet the needs of organizations providing food assistance in neighbourhoods – the CDC Plateau-Mont-Royal's SALADE mobile, in 2022-2023, and Épicentre Saint-Henri's ÉpiCamion project, in 2023-2024.

Collectif Récolte also supported the Mutuelle d'approvisionnement des marchés solidaires (MAMS) as part of the SALIM program in 2022, and assisted MAMS in evaluating the impact of its shared transportation solution.

Coop Carbone also supported a number of pooled transportation projects:

- The study *Optimisation logistique pour le développement d'un plan de transport durable des denrées dans les Laurentides (*Logistics Optimization for the Development of a Sustainable Food Transportation Plan in the Laurentians*)* (2019). In collaboration with the Centre d'innovation en logistique et chaîne d'approvisionnement durable (CILCAD), the study identified various opportunities for pooling resources among regional agri-food organizations.
- *Livraison Arc-en-ciel* (2020). Support for four bicycle delivery companies in Montreal to provide businesses with a free service under a common banner.
- L'Aube Food Hub (2023). Functional analysis and support for managers to structure a turnkey delivery service for the four market gardens behind the hub.

Coop Carbone also co-developed and delivered a series of training courses in transportation and logistics as part of a cohort of food logistics hubs for the Conseil québécois de la coopération et de la mutualité (CQCM; 2023 to 2025).

Coop Carbone facilitated partnerships between mutual aid organizations and circular economy businesses in the Quebec City region. These partnerships aimed to encourage the sharing of storage space and delivery routes, while also calculating the financial benefits and reductions in GHG emissions. This work was carried out by the Centre d'économie circulaire de Québec and the Chantier Mutualisation de la Ville de Québec as part of the ÉCLOT 1 and 2 projects (2023-2025).

## The shared truck projects presented in this chapter

### L'Aube Food Hub

L'Aube Food Hub is a collaborative project launched in 2021 by four organic farms in the West Island. The hub's mission is to strengthen the resilience of member farms and democratize access to local and organic products in public institutions and community organizations. The hub offers mutualized services, such as collective marketing through an ordering platform (Arrivage), to support the farms in their activities. From 2021 to 2023, a truck was leased by Collectif Récolte for the purposes of the project. This helped to refine our understanding of the needs of stakeholders and evaluate the principles of collaborative governance, ensuring that future activities would run smoothly. Since 2023, L'Aube has had its own refrigerated truck with a driver to facilitate distribution. It also makes this truck available to its member farms, with or without a driver.

### CDC Plateau-Mont-Royal

#### The SALADE mobile

Stemming from the Local, Accessible, Sustainable, and Economical Food System (SALADE) project led by the CDC Plateau-Mont-Royal, this initiative emerged in 2022 as part of the local food security committee's consultation process. The project's goal was to meet the needs of neighbourhood organizations that provide food assistance but do not always have a vehicle at their disposal. The SALADE mobile is more than just a vehicle shared by several organizations in the Plateau-Mont-Royal neighbourhood; it is a true community food transportation service with a driver. In addition to supplying organizations with food, the SALADE mobile makes home deliveries, thereby helping to improve access to food for people in vulnerable situations, particularly those with reduced mobility or loss of autonomy.

### Épicentre Saint-Henri

#### L'ÉpiCamion

The ÉpiCamion project, led by Épicentre Saint-Henri, offers a truck equipped with a refrigerated compartment at affordable rates. It allows organizations, businesses, and individuals to share this vehicle for food distribution in the greater southwest area of Montreal, simplifying logistics management and promoting solidarity.

## Mutuelle d'approvisionnement des marchés solidaires (MAMS)

### The truck of the MAMS

From three founding members in 2020 to 25 members in 2025, MAMS pools human and logistical resources to serve markets, solidarity grocery stores, and community organizations in the greater Montreal area in order to reduce their operating costs and environmental footprint. Its model is based on mutualizing a truck and a delivery person, enabling each member organization to benefit from a delivery service without shouldering the individual costs and administrative burden of owning and maintaining a vehicle such as purchase, maintenance, fuel and routes.

# FIRST TIP: START WITH A PILOT PROJECT

Before considering launching a large-scale pooled transportation partnership, we strongly recommend you start small and test a shared transportation idea through a **pilot project**. A few partners (three to five), a limited scope (geographical area and types of activities), and a short, fixed period (a few months or a season, depending on the case) are sufficient to test the idea.

The following steps are useful in setting up a pilot project. We will delve deeper into each of them in the next sections of this guide.

### STEP 1 – Define the scope of the project

Start by analyzing the current parameters of identified and/or interested partners. The objective is to assess needs and available resources, confirm partner compatibility, and recruit additional partners. A functional analysis will then establish the logistical parameters of the project.

### STEP 2 – Structure the operational model

Then look at the various mutualization models and vehicles, evaluate the option of a designated driver, address the issue of insurance, and assess management tool options.

### STEP 3 – Formalize an agreement

We recommend that the pilot project be governed by an agreement co-drafted by the partners or with the help of a trusted third party, to clearly establish each partner's responsibilities and commitments as well as the terms of service.

### STEP 4 – Pilot the project

This step covers all elements directly related to activities—schedules, reservations, route planning, and rates—as well as the important issue of communication between partners and promotion of the project.

### STEP 5 – Evaluate performance and impact in real time

Rigorous and accurate data collection will make it possible to track the project's success indicators, evaluate the achievement of expected results, and, if necessary, adjust the scope of the project.

### STEP 6 – Prepare for sustainability and, if necessary, scaling up

If the pilot project is successful, it is important to quickly plan the next steps to ensure its continuity. Project governance must then be established and a financial package put together.

# 01 Establish a partnership and define the scope of the project

## 1.1. Preliminary analysis

### Needs assessment and available resources

The first step is to conduct a **preliminary analysis** to better understand the operational realities of each partner that has already been identified and expressed interest. The goal is to assess the compatibility of activities and routes between potential partners, identify their specific needs, and determine which resources can be shared.

This analysis can be carried out using a survey or through discussions with each partner. It is also helpful to organize the data collection process in such a way that anticipates what information will be useful for the next steps.

## Toolkit: Sample questionnaires

In the toolkit in Appendix I , you will find examples of questionnaires to explore the needs and resources available for two types of projects:

- A collective delivery project for a group of producers.
- A shared delivery project for community organizations that implement food assistance projects.

These examples can serve as a basis and be adapted to the reality of your project.

Relevant data to collect during the **preliminary analysis**:

- The locations of potential partners' production, storage, processing, distribution, and sales sites.
- The areas and territories where they transport their goods.
- The type of goods transported. For example, food products must comply with hygiene standards. Refrigeration temperature is another key factor (4°C for fruits and vegetables, 2 to 4°C for meat and dairy products). In addition, certified organic foods must not be mixed with conventional foods.
- The fill rate of vehicles throughout their current delivery routes must also be considered. For example, a potential partner's vehicle that usually leaves full and returns full because it makes pickups along the way will have fewer opportunities to contribute effectively to a shared transportation network.
- Current transportation costs and workload.

**An effective method is to record actual trips made over a one- to two-week period using a spreadsheet or shared tracking tool.**

Information to document for each trip:

- The **address visited**.
- The **type of task** (delivery or pickup).
- An estimate of the order **volume** (e.g., number of pallets or square feet of floor space required in the vehicle, or volume required).
- An estimate of the **duration of the task**, in minutes (i.e., the time between arriving at one stop and departing for the next).
- The type of **vehicle used**.
- The **date** of the task.
- Any relevant **time constraints** (e.g., loading dock closed during lunch hour or delivery possible after 11 a.m. only).
- Any specific **equipment constraints** (e.g., need for a tail lift or Tommy Lift).

## 1.2. Partner mobilization

### Confirm the commitment and compatibility of partners

Once the benefits revealed by the preliminary analysis have been identified (particularly the potential for cost reduction), these results can be used to strengthen stakeholder commitment to ensure that the right partners are around the table and that they are compatible. They can also be used to attract new partners who can contribute to the project by sharing missing resources or equipment with the group, or by increasing transport demand (for example, if the current group has needs for four days a week, adding a partner to cover a fifth day would make the project viable).

It may be worthwhile to organize a workshop to present the results of the preliminary analysis with the partners who participated in it, and an information session for potential partners. These mobilization activities can be carried out at the same time as the functional analysis, or as preparation for it.

## 1.3. Functional analysis

### Clarify logistical parameters with partners

Once the group of partners is mobilized, one or more collaborative workshops can be organized to explore the logistical aspects of the project in greater depth. These workshops can lead to a better understanding of the practical challenges, complementarities, and available resources. Here are some tools that can be used to support the functional analysis:

#### 1. Process mapping

This tool, in the form of a grid based on simple questions, provides an overview of an organization's activities (its needs and capabilities). **Horizontally**, it shows the chronological sequence of the hub's activities (from the producers' fields to the customers' kitchens, for example); **vertically**, it shows different themes that correspond to specific questions, such as:

- "What do we do?" (activity);
- "Who does it?" (actors and human resources);
- "With what equipment?" (equipment);
- "With what systems?" (information tools).

This mapping makes it possible to quickly identify the organization's strengths, weaknesses, and current or future issues with its processes. In a way, this table tells the story of the organization's operational processes.

The table below illustrates a map of a fictional hub.

# 01 Establish a partnership and define the scope of the project

**Table 1: Example of a process map for a fictional food logistics hub (developed by Coop Carbone)**

| | Producer | Transport | Storage | Transport | Customer |
|---|---|---|---|---|---|
| **Activity** | Harvesting, store sales, processing | Pick up at producer's | Storage, quality control and order preparation | Delivery to customers, markets and drop-off points | Distribution/final sale in store, kiosk, drop-off point |
| **Actors** | 25 growers | Hub + transporter in peak season | Hub: Le Renard Gourmand | Hub + transporter in peak season | 750 individuals / 30 drop-off points 4 markets 26 restaurants |
| **Human Resources** | Average: 2 owner-growers 5 seasonal workers | Hub's delivery drivers | 2 admin 4 warehouses | Hub's delivery drivers | Growers at the kiosks, delivery people at drop-off points, store employees |
| **Material** | Tractors, non-refrigerated storage, personal vehicles | 2 - 16 ft box trucks + Reefer | 3,000 ft2 refrigerated 1,100 ft2 freezer 1,500 ft2 dry | 3 eTransit vans + Reefer | 2 kiosks, folding tables, store fridges/freezers |
| **Information** | B2B online sales (Arrivage), B2C (website), product catalogue | Virtual order forms, transportation software | Order and inventory systems, CRM | Virtual order forms, transportation software | Point-of-sale systems for market kiosks |

**Key:**

- **situation requiring special or immediate attention or which is potentially problematic**
- **strength of the organization**
- **recent improvement**
- **recent deterioration**

In this example, we analyze the activities of a fictional food logistics hub: **Le Renard Gourmand. The hub itself** collects products from its 25 producers and delivers them to a diverse customer base in its region.

It has access to a large storage space, optimized order preparation processes, and efficient order management and customer relationship management systems.

However, certain challenges are emerging: The hub has recently taken on new members but lost customers, which complicates the search for outlets for its producer partners.

In addition, one of its vehicles is no longer usable, making deliveries more difficult to organize and lengthening the working days of its delivery drivers.

### 2. Geospatial mapping

A collaborative map, created on Google My Maps for example or Felt Maps, allows partners to locate their places of business, delivery areas, and the major traffic routes used during their journeys. It highlights the spatial overlaps between their activities, which is a strong indicator of compatibility.

### 3. Delivery schedule table

This table specifies the days and time slots of activity for each partner, as well as any specific time constraints.

### 4. Inventory of available resources

This document lists the storage space, vehicles, and human resources that each partner is willing to contribute to the shared project.

### 5. SWOT[1] matrix

This tool summarizes the strengths, weaknesses, opportunities, and threats of the project, highlighting areas that require special attention.

It is important to keep in mind that this initial phase of work is as much about overcoming **obstacles** as it is about strengthening the **commitment** and **interest of the partners**.

At the end of step 1, the group should have a clear vision of the following:

- The **type of pooling** envisaged (carpooling, car sharing, full-scale group transport, a model inspired by agricultural equipment sharing cooperatives (CUMA) or shared labour cooperatives (CUMO), etc.) – see Chapter III - Various pooled transportation models (Collectif Récolte, 2025a).
- The **type of goods** to be transported.
- The type(s) of **vehicle(s)** to be used.
- The **human resources** to be planned for or involved.
- The estimated cost of the shared service.

This information is key for the next steps, particularly the third, in order to determine the governance structure that will oversee the project. However, at this stage, it already makes it possible to establish its scope:

[1] SWOT analysis (Strengths, Weaknesses, Opportunities, Threats) is used to assess a business' current situation in order to identify key issues (Mouvement québécois de la qualité [MQQ], n.d.).

# 01 Establish a partnership and define the scope of the project

- **Criteria for selecting participants:**
  - Geographical proximity of users and their travel locations.
  - Product compatibility (e.g., avoid combining meat and vegetables without sanitary controls, or organic and non-organic foods).
  - Willingness to collaborate (give priority to people who are available and open to experimentation, avoid participants who are not very committed at this stage).
- **Define a clear scope of activities:**
  - Number of deliveries per week.
  - Areas served.
  - Types of customers (markets, restaurants, etc.).

## Feedback from our partners

| | |
|---|---|
| L'aube FOOD HUB | The shared delivery vehicle project in the West Island began in 2021, following a series of consultations involving local producers, led by Collectif Récolte. This collective approach brought the relevant stakeholders together and helped identify the necessary logistics. Questionnaires and individual interviews were used to assess the specific needs of the partners and inform the implementation of the project. The delivery requirements of different categories of potential new customers, such as HRIs (hospitality, restaurant, institutional) and community organizations were studied through case studies and individual discussions. |
| ÉPICENTRE SAINT-HENRI<br>(ÉpiCamion) | The Saint-Henri Roundtable assessed the needs in a collaborative manner and played a central role in providing strategic and financial support for the project's launch. Thanks to this support, the necessary resources were quickly identified and the project transferred to Épicentre smoothly.<br><br>A project committee was established to support the deployment of the shared truck and ensure coordination between partners. Several surveys were conducted at different stages of the project, primarily using Google Forms, to gain a better understanding of the partners' evolving needs. In addition to these formal steps, informal discussions held during committee meetings enabled a more participatory approach, directly capturing the needs expressed by the partners in attendance. |

01 Establish a partnership and define the scope of the project

| | |
|---|---|
| CDC PLATEAU-MONT-ROYAL<br>(SALADE mobile) | The project was launched following the spontaneous mobilization of local stakeholders, primarily through word of mouth. This encouraged the stakeholders to come together and identify their logistical needs. A questionnaire was also used to clarify the partners' expectations and inform the implementation of the shared transport service.<br><br>Prior to pooling, deliveries were made by several volunteers using their own vehicles, which complicated management and limited the available space for food. The shared service effectively meets logistical needs today and, in particular, serves people without access to a personal vehicle by offering them support with handling. |
| Mutuelle d'approvisionnement des marchés solidaires | In 2016 and 2017, three solidarity markets in Montreal (Ahuntsic-Cartierville, Frontenac, and Cadillac) began discussing their common needs and challenges in terms of local and solidarity-based sourcing. They were struggling to source affordable local fruit and vegetables to resell at reasonable prices, in line with their mission to increase food security. The three markets quickly established an informal agreement to share a truck and human resources so that they could collectively source fruit and vegetables directly from local producers. This initiative laid the foundations for MAMS, which became a non-profit organization in 2020. Since then, MAMS has periodically surveyed the needs of its members. |

# 02 Structure the operational model

The section below discusses specific considerations and advice for shared transportation projects. However, as these are often part of a collective sourcing project, we also invite you to consult the guide *Launching a Collective Food Procurement Project* (Collectif Récolte, 2024). This guide was designed as a collective discussion tool, addressing issues related to governance, human resources organization, supply and distribution planning, activity management, and digital management tools.

02 Structure the operational model

## 2.1. Choosing a pooling model and type of vehicle

Before structuring your project in concrete terms, it is crucial to determine the pooling model that best suits your needs. *Chapter 3* (Collectif Récolte, 2025) of the ***Decision Support Guide for Food Transport Vehicles*** provides an overview of the **different pooling models**, along with concrete ideas to help you get started.

This choice must be based on a realistic assessment of the collective needs of the partners, the total volume of transport to be managed, and the human and material resources that each partner can provide. The chosen model will directly influence the type of vehicle to be used (e.g., van, refrigerated vehicle, etc.) and the terms of sharing between the project members.

## 2.2. Determine a parking location

From the outset, it is essential to plan where the vehicle will be parked. In a shared project, the parking space should ideally be central and accessible to all partners. Remember to factor in associated costs (parking permits, rental fees, municipal permits) when planning your budget.

### Plan for charging electric vehicles

If you opt for an electric vehicle and its battery range meets the needs identified in the functional analysis, planning where and when to charge the vehicle becomes a key issue. In a shared project involving several partners, this issue goes beyond a simple connection and also affects daily logistics, cost sharing and access to shared charging locations. It is therefore essential to collectively evaluate the options, whether they are public stations or private stations installed on the partners' sites. Concerted planning ensures efficient and economical charging that is compatible with each organization's schedules and constraints.

**Charging at public stations**: Public network stations, such as those in the **Electric Circuit**, are convenient but can incur significant costs, typically between $1 and $3 per hour of charging. This can add up to as much as $15 for a full charge (8 to 10 hours), depending on the vehicle model.

**Charging at a private station**: If one of the partners can offer access to a private charging station, for example at their storage or parking facility, the costs are significantly reduced. In this case, the cost of charging depends on Hydro-Québec's kilowatt-hour (kWh) rate, which is approximately $0.10 per kWh for low-power charging. Thus, the cost of an equivalent full charge is generally between $5 and $6, depending on the battery capacity and the amount of energy delivered for charging, which varies between 50 and 60 kWh.

*Include these costs and access to charging stations in the project's budget and logistics planning.*

## 2.3. Service with or without a driver

Whether to use a shared transport service with or without a driver hired by the project must be decided based on the volume of deliveries, available resources, and partnership objectives. This decision affects the structure of project activities, the overall cost, and the partners' experience.

**Advantages of a shared driver:**

- Allows partners to offload day-to-day logistics management, including planning, hiring, supervision and expense management.
- Strengthens the sense of belonging and human connection, as this person represents the project and its partners to customers or beneficiaries. A dedicated driver can ensure consistent quality and reliability standards for customers.
- Allows related roles to be delegated and saving partners time (e.g., receiving and packing orders, route management).
- Encourages and facilitates the implementation of other forms of resource pooling among partners (e.g., group purchases, storage space sharing).
- Provides useful field expertise to optimize routes or organize loads.

**Possible disadvantages:**

- May represent a significant cost if delivery volumes are insufficient or irregular.
- May create dependence on a single person which poses a risk in the event of their absence or departure).
- Requires rigorous management of legal aspects, such as insurance, Commission des normes, de l'équité, de la santé et de la sécurité du travail (CNESST), as well as shared responsibilities.
- May cause tension if expectations between the driver and partners are unclear or not aligned (e.g., schedules, transport conditions, communication).

If the **volume of deliveries** does not justify hiring a full-time employee, you might consider **combining** the role of driver with other useful project-related responsibilities:

- **Route planning**: The best dispatchers, who are responsible for daily transport planning, are often former drivers and are familiar with the challenges of the role.
- **Order assembly:** Drivers can prepare orders to facilitate loading and ensure that products are protected during transport.
- **Vehicle maintenance monitoring**: Drivers who are involved in vehicle management are more likely to keep the vehicles in good condition by carrying out regular checks and maintenance and monitoring the budget .
- **Customer service**: Drivers can represent partners, strengthen ties with customers or retailers, and support service quality, particularly in collection or solidarity-based supply projects.

# 02 Structure the operational model

## Feedback from our partners

### Hiring a dedicated shared driver

| Advantages | Disadvantages |
|---|---|
| **L'Aube Food Hub** – Refrigerated truck with driver, made available to member farms, with or without a driver | |
| • **Consistent service quality.**<br>• **Potential savings on insurance.**<br>• **Versatility of the driver**, who manages logistics as a whole (route planning, loading, delivery, vehicle maintenance, parking management, billing, and partner relations). | • **Heavy reliance on a single person** for driving and deliveries, which complicates logistics in the event of their absence. |
| **ÉpiCamion** – Refrigerated truck with dedicated driver | |
| • **Simplifies day-to-day management** (loading, unloading, and moving of transported products) thanks to the role of driver/warehouse worker.<br>• **Added value recognized** by partners.<br>• **Strengthens ties with partners** by promoting proximity and relationships of trust. | • Driver's **salary fully covered by the organization** (ÉpiCentre Saint-Henri).<br>• Dependence on a single person makes the **service vulnerable in the event of their absence.** |
| **SALADE mobile** – Shared truck with dedicated driver | |
| • The driver is responsible, **vigilant and autonomous**, using the vehicle as if it were their own.<br>• **Costs are shared equally** among users, making the service more affordable.<br>• Eliminates the need for partners to **manage** hiring and human resources tasks individually.<br>• The driver develops valuable **collective expertise** and becomes a reliable resource.<br>• Promotes **social connection** and the development of a local network. | • Vehicle sharing **may limit schedule flexibility** for some users.<br>• With a full-time driver, **one-off deliveries are more difficult** to accommodate.<br>• **Replacements can** sometimes be complex to manage.<br>• Frequent driver changes undermines the **stability of the service**, often perceived as a key factor for success. |

## Hiring a dedicated shared driver

| Advantages | Disadvantages |
|---|---|

**Mutuelle d'approvisionnement des marchés solidaires (MAMS)** – Two shared trucks during the summer season (including one electric truck in 2025), with a dedicated driver/delivery person

- **Efficiency gains** by sourcing directly from local producers and processors.
- **Savings in management and travel time** as the delivery driver starts their day at 3:30 a.m.
- **Logistics are simplified**: MAMS handles all aspects of:
- **human resources**, including recruitment, training, and management. The result is stability, a reliable delivery service, and expertise in meeting members' needs.
- **trucks**, including insurance, maintenance, fuel, purchase or rental, and route management. This lightens the logistical burden on members.
- Logistics and HR **costs are reduced** (one or two delivery drivers work for 25 members).
- **Access to different markets** for local producers.
- **Reduced environmental footprint** is achieved through significantly reduced kilometres travelled and the purchase of an electric truck in 2025.
- **Mutual assistance and the exchange of best practices** between member organizations with common motivations and needs.

- **Schedule and workload**: Delivery drivers start at 3:30 a.m. and must be flexible in order to deal with unforeseen circumstances. The work is physically and mentally demanding involving heavy loads and a need for vigilance to avoid errors.
- **Seasonality of work and small team**: Maintaining a competent and trained team year after year is a major challenge (two or three people in the summer and one in the winter).
- Dependence on a single person makes the **service vulnerable in the event of their absence**.
- Adding new members complicates **the optimization of delivery routes** and can create logistical inconsistencies.
- There is **often uneven distribution of orders** between the two trucks, depending on the respective orders and routes.
- There are continuous adjustments relating to **cost and revenue control** in order to generate sufficient profit margins and ensure the continuity of services, while offering competitive rates to members.

## 2.4. Planning for insurance

The issue of insurance can quickly become complex to manage in multi-partner projects. The table below presents several scenarios and recommends the necessary actions depending on the context.
Depending on the person or organization making the deliveries (a partner or a hub), the frequency of deliveries (occasional or regular), and the mode of vehicle sharing (occasional, frequent, or not shared), several elements may change: vehicle registration, type of insurance policy, and specific clauses to be included.

**Table 2: Advice on insurance, registration, and licences (Coop Carbone)**

| Who makes the deliveries? | How frequent are the deliveries? | | Is the vehicle shared? | | |
|---|---|---|---|---|---|
| | Occasional and/or voluntary | Frequent and/or for profit | Yes | | No |
| | | | Occasionally | Frequently | |
| Deliveries made between partners (a fairly horizontal partnership in which none of the members is particularly specialized in transportation) | No special provisions for insurance or registration. Civil liability insurance and a Class 5 licence should suffice. | L or P registered vehicle required. Cargo insurance recommended. | Check whether drivers are covered by a “borrower’s clause” or add them to the insurance policy as occasional drivers. | Add permanent drivers to the insurance policy or include an “all driver” clause allowing any employee or subcontractor to drive. | No special provisions for insurance or registration. |
| Deliveries made by a hub or other third-party organization specializing in transport (a more advanced degree of maturity where the main activity of one of the partners in the group is transport) | L or P registered vehicle, cargo insurance required. | L or P registered vehicle required. Cargo insurance recommended. | | | Include an “all driver” clause in the insurance policy to cover all employed or subcontracted drivers. |

(Sources: Union des producteurs agricoles [UPA], 2023; UPA, 2014; Intact Insurance, 2025; Rentino-Parazelli, 2023; Société de l’assurance automobile du Québec [SAAQ], 2025)

## 2.5. Choosing the right management tools

Setting up a shared transport service requires a variety of tools to ensure effective management at different levels, such as planning requirements, organizing routes, financial monitoring and coordination between partners.

Here are some examples of tools to consider depending on the needs of the project.

### Traditional management tools

1. Accounting system: Essential for managing financial documentation and ensuring rigorous monitoring of cash flows related to transport activities.
2. CRM: A tool dedicated to customer relationship management allows you to create customer files, track their orders and communications, and archive customer service exchanges or incidents.
3. Dashboards or results matrices: Used to set performance indicators and track the achievement of objectives, these tools can be adapted to different aspects of the project (delivery, warehousing, communication, etc.).

### Communication tools

1. Internal: Facilitates collaboration between partners (see section 4.1.).
2. External: Ensures the project's visibility, promotes it, and raises its profile (see section 4.5.).

### Activity management tools

1. **Online sales or order-taking platform**: This tool allows customers to place orders or make purchases, depending on the chosen operating model. It generally includes billing features and can offer a shared catalog, thereby facilitating collective marketing or procurement.
2. **Inventory and warehouse management system (WMS)**: Connected to an online sales platform and a **transportation management system (TMS)**, this system tracks inventory in real time. It facilitates inventory adjustments based on harvests, goods receipts, or sales.
3. **Collaborative transactional platforms**: These connect producers, processors, retailers, community organizations, etc. (see section 4.2).

For small-scale projects, it is advisable to **keep management tools as simple as possible** and, above all, **aligned with existing management tools** within the various partner organizations. Take the time to thoroughly document your specific needs and limit the number of different tools implemented as much as possible. A list of ideas for consideration is provided in section 9 of the guide *Launching a Collective Food Procurement Project* (Collectif Récolte, 2024).

Some of these tools can be customized using simple spreadsheets on collaborative digital platforms (such as Microsoft 365 Excel or Google Sheets).

However, as the project grows, more advanced solutions can greatly simplify management and better meet the needs of partners. Many grants are available to support the adoption and development of tools as well as digital transformation, such as the DATAide program (Centraide, 2024). Don't hesitate to develop straightforward user guides and procedures to help your members and partners learn how to use the tools.

To help you choose, suggested tools are listed in boxes throughout Step 4, *Pilot the Shared Transport Project*.

Excerpt from the guide *Launching a Collective Food Procurement Project*, published by Collectif Récolte in 2024:

### SECTION 9: EQUIP YOURSELF WITH EFFECTIVE DIGITAL TOOLS

**Food for thought**

- **What tasks could be made easier with a digital tool?**
  - Are your current management tools effectively meeting your needs?
  - What is currently missing or inefficient in your operations?
  - Is the transfer of information smooth and optimal? Within the team? With buyer members? With producers?

- **What management tools do you use for:**
  - Supply management?
  - Order management?
  - Inventory management?
  - Delivery route planning?
  - Invoice management?

- **What are the costs and benefits of implementing a new digital tool?**
  - How much time are you willing to invest in researching a new digital tool, implementing it, and making it your own?
  - Do you have a competent in-house person to ensure the tool's implementation?
  - Are current members sufficiently familiar with digital tools? If not, do you have the time to train them?
  - Will their use save time or convenience for the team or its members?

## Feedback from our partners

| | |
|---|---|
| L'aube FOOD HUB | The organization uses **Google Workspace**, including **Google Sheets** and **Google Docs**, to plan routes, track progress, and allocate costs among transport service users. The **Arrivage** platform is used to take and manage orders. A **calculation tool developed by Coop Carbone** is also used to plan routes and set rental rates based on trips and needs (see template presented in Step 4). Internal communication is mainly done via **Slack**. |
| ÉPICENTRE SAINT-HENRI (ÉpiCamion) | No specific management tool is used for the project. Routes are planned on an ongoing basis, according to needs, for example using **Google Maps**.<br><br>For its other activities, ÉpiCentre mainly uses **Excel** as a management tool, particularly for tracking deliveries, invoicing, and managing the food bank. An **Access database** is also used to centralize user information. |
| Mutuelle d'approvisionnement des marchés solidaires | MAMS uses **Google Workspace** to organize routes (**Google Maps**) and to manage procurement, orders, and invoicing (**Google Sheets**).<br><br>By the end of 2025, it will have a more efficient ordering platform to optimize the time spent managing activities and simplify communication with members. |

# 03 Formalize a partner agreement

At this stage of the project, it is often **too early to consider creating a separate legal structure** to oversee project activities. However, even in an experimental phase, it is essential that partners **agree on clear terms for collaboration**.

Table 3 below presents some examples of topics to address when establishing a partnership in order to mitigate the risks of dissent and tension between partners. Major risks are identified with an exclamation mark and explained in detail below the table.

**Table 3: Risks related to the relationship between partners in shared transport projects (Source: Coop Carbone)**

***(!)** Major risks are identified by an exclamation mark and explained in detail below the table.*

| Category | Risks of dissent |
|---|---|
| Partnership structure | Choice of partners for the initial group<br>Group size<br>Leadership and conflicts of interest between partners<br>Dynamic management of relationships between partners |
| Behaviour | Trust between partners<br>Differences in organizational culture<br>Significant differences in incentives between partners |
| Planning and activities | **Coordination mechanisms (!)**<br>**Negotiation of delivery rates (!)**<br>**Allocation of costs and profits (!)**<br>Discrepancy between partners' levels of knowledge<br>**Discrepancy between partners' service levels and standards (!)**<br>Discrepancy between partners' technological levels |
| Business/Market | Risk of collusion between partners<br>**Sharing of confidential information (!)**<br>Damage to a partner's reputation if service levels are not met |

# 3.3 Formalize a partner agreement

**Coordination mechanism**: Partners must agree on communication channels, roles, and responsibilities so that their staff know who to contact and when to expect responses to ensure smooth coordination. For example, should a restaurant customer who has had a problem with a delivery contact the producer directly, or rather the partner providing the delivery?

**Defining delivery rates, allocating costs and profits**: A partner making deliveries for another must be fairly compensated for this service, and the savings achieved by pooling transport activities must be shared according to a clear formula decided collectively to ensure the viability of the partnership. To facilitate discussions, an analysis of each partner's specific transport costs can help determine what each is entitled to receive in return for their contribution, or what they would gain by entrusting their deliveries to a shared service.

**The issues of pricing and the allocation of costs and benefits are particularly important, as they determine the financial viability of the partnership.**

**Common service levels and standards**: Some carriers deliver the day after the order is placed, others on the same day. In the event of a failed delivery, some attempt a second delivery on the same day, others the next day, and others wait to confirm with the customer before attempting delivery again. These operational details must be harmonized between the partners in order to eliminate any discrepancy between their expectations and the delivery service that will be provided on their behalf.

**Sharing confidential information**: Technically competing companies that deliver for each other gain direct contact with their competitors' customers or food donation suppliers. This situation requires partners to have a high degree of trust in each other. We strongly recommend that you consult a lawyer if you wish to establish guidelines regarding non-solicitation or non-competition to ensure that such clauses are legally compliant. It is also important to include a confidentiality clause to keep all parties' confidential data secure.

## Seek assistance in co-drafting a written agreement

**A written agreement**, co-drafted by the stakeholders or with the support of a trusted third party, helps to prevent misunderstandings and clarifies expectations from the outset.

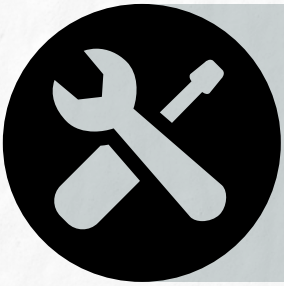
This agreement can take the form of a contract, adapted to the temporary and evolving nature of the pilot project (see Appendix II for an example).

# 03 Formalize a partner agreement

It may include the following, in particular:

- **the roles and responsibilities of each partner**. For example: who is responsible for vehicle leasing, storage, order preparation, deliveries, or logistical and administrative coordination;
- **the level of commitment of each partner**. This may include the types of deliveries that will be shared as well as the material, human, or financial resources that will be mobilized;
- **each partner's contribution to collecting the data required to monitor the indicators used to evaluate the success of the pilot project**. For example: the number of deliveries made, the satisfaction rate of the partners, the savings achieved, or the environmental benefits;
- **the rules for using the vehicle** (may be included in an appendix). For example: parking location, cleaning, fuel management, logbook to be completed (if applicable);
- **the terms and conditions for pricing and allocation of costs and profits** (may be included in an appendix);
- **contractual terms with the driver** and **civil liability insurance** terms.

Even if this is only the first phase of experimentation, such a preliminary agreement is essential to ensure the smooth running of the project and to draw useful lessons for possible scaling up.



### Toolkit: Example of a preliminary collaboration agreement

In the toolkit in Appendix II, you will find a collaboration agreement template developed by Collectif Récolte as part of the SALIM program. We invite you to adapt it to your needs.

# 04 Pilot the shared transport project

Once the shared transport project has been launched, it is essential to put effective tools in place to coordinate daily activities.

This section offers concrete suggestions for facilitating communication between partners (4.1.); scheduling and reservation management (4.2.); optimal planning of shared delivery routes (4.3.); equitable sharing of the costs and benefits of sharing (4.4.); and, finally, ways to promote the shared transport project (4.5.).

## 4.1. Facilitating smooth and tailored communication between partners

The success of a collaborative project depends on clear communication that is accessible to all. There is no universal tool. The best means of communication depends above all on individual habits and the tools used within their respective organizations. The key is for participants **to choose together** the simplest and most effective solutions for them.

| Type of communication | Suggested tool |
|---|---|
| Emergencies, last-minute changes | Text messages (SMS, messaging apps) |
| Sharing documents, important information | Emails |
| Group updates, follow-ups | Emails, virtual or in-person meetings |
| Project management, work coordination, and task tracking | Trello, Slack, Microsoft Teams, Monday, Google Workspace, ClickUp |
| Collaborative work on documents | Google Workspace, Microsoft Teams, Microsoft OneDrive, Microsoft SharePoint |

## 4.2. Coordinating schedules and reservations

In a shared transport project, each partner has different needs: market days, deliveries, regular trips, etc. To optimize vehicle use and avoid scheduling conflicts, good planning is key.

From the outset, it is essential to **gather information on the availability and specific needs of all users (see Step 1)**. This includes the days and time slots of use, the nature of the trips (e.g., deliveries, market visits, other trips) and any special constraints (e.g., a mandatory return before a certain time).

To facilitate this coordination, we recommend that you set up a **shared calendar** to which all partners have access. This calendar allows you to:

- clearly visualize planned periods of activity, on a seasonal or weekly basis;
- identify the days and time slots reserved by each user;
- quickly identify potential overlaps or conflicts in reservations;
- adjust routes and collective planning to maximize the efficiency of the shared vehicle;
- incorporate unexpected events or last-minute changes using an easily modifiable digital tool.

This calendar can also be used to **manage reservations** by specifying, for each use, the date, time, partner involved, and the person responsible for driving, which improves transparency and collective responsibility.

**Concrete example:**

In a collective of producers, two people who deliver on Wednesdays can use the same vehicle at different times. However, if one of them needs to go to a market in the afternoon, they must coordinate the return of the vehicle in time to avoid delays.

This shared schedule can first be created on paper during a meeting or co-creation workshop, and then transferred to a collaborative digital tool to allow for real-time adjustments.

### Some tools to consider

Platforms such as **Google Calendar**, **iCalendar** or **Microsoft Teams** are simple and accessible solutions.

## 4.3. Planning and optimizing routes

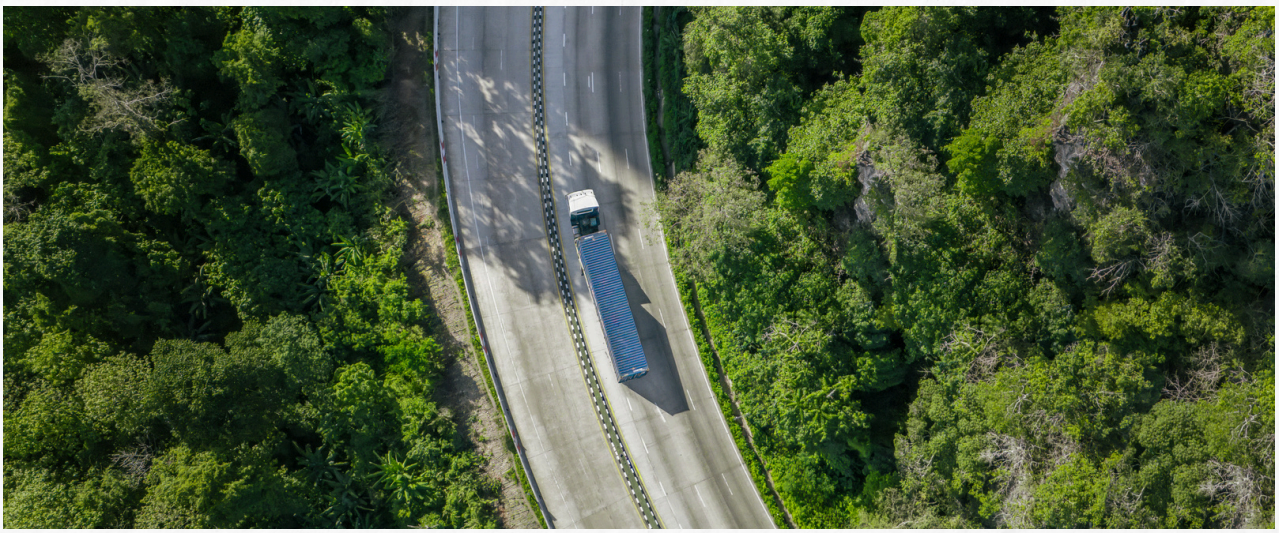
As mentioned above, for smaller projects, trip planning can be managed using simple Excel or Google Sheets spreadsheets. Specialized tools require greater digital skills and are not always accessible to organizations. In short, the choice of tool depends on the size of the project, the capabilities of the partners, and the available resources (time, technical skills, budget).

Although there are no digital platforms specifically designed to facilitate shared transportation, several transportation logistics management tools (known as **Transportation Management Systems**) can be adapted for collective projects. These systems facilitate route planning, optimizing vehicle itineraries based on various criteria such as duration, volume and equipment required. Among other things, these tools enable you to:

- plan and optimize routes;
- calculate distances, durations, and associated costs;
- manage delivery schedules and distribution among users;
- track journeys in real time.

These tools also generate useful data for evaluating logistics performance and associated costs. A mobile interface is often accessible to drivers or delivery personnel via a tablet or phone.

The table below provides an overview of existing tools, including their main features, estimated costs (as of spring 2025), and perceived advantages and disadvantages for shared transportation projects. Other TMSs are designed for professional and more complex activities but may be suitable for collective projects that are growing or require advanced features.



## Table 4: Overview of various existing transportation logistics management tools

| Name of tool | Type of solution | Target customers | Estimated cost | Advantages | Disadvantages |
|---|---|---|---|---|---|
| AgroTaxi (Table agroalimentaire de Chaudière-Appalaches) | Web platform for networking and collaborative delivery | Agricultural producers, processors, customers, etc. in Chaudière-Appalaches | Variable per delivery | Intuitive interface and simplified payment management for delivery drivers | Less suitable for large deliveries or more complex logistical needs |
| La Charrette (used in Quebec by the Saveurs du Bas-Saint-Laurent collaborative delivery service) | Collaborative delivery web platform | Agricultural producers, processors, customers, etc. in a defined geographical area | Unknown | Clear interactive map to easily identify recurring routes and overlapping areas | Requires active support to generate concrete opportunities for pooling resources |
| Workwave RouteManager | Logistics management tool specializing in deliveries (TMS)<br><br>Uniquely web-based software, subscription required (SaaS[2]) | Delivery operators | $600/vehicle/ year | Very comprehensive tool with advanced analysis, optimization, and multi-user management features | Complexity of use that requires a certain level of technical expertise to realize its full potential |
| FasterCOM | TMS logistics tool<br><br>Web-based software with subscription (SaaS) or full licence | Delivery operators | Fixed deployment cost + $1/delivery | - Solution designed for sharing<br>- Interface adaptable to project needs<br>- Several pricing options (per licence, per vehicle, or per delivery)<br>- Deployment sometimes eligible for subsidies (e.g., Emploi Québec, TEQ[3] ) | Long and costly implementation, requiring several months of deployment |
| GoMove | TMS logistics tool<br><br>Uniquely web-based software with subscription (SaaS) | Delivery operators | $100/vehicle/ month | - Good pooling capabilities (with custom development)<br>- Comprehensive overview of multi-stakeholder activities | Solution initially designed for heavy goods. Custom development for a sharing project represents a high cost (≈ $30,000) |
| ProgressionLIVE | TMS logistics tool<br><br>Uniquely web-based software with subscription (SaaS) | Delivery operators | $330/month + $7/vehicle | - Widely used platform in Quebec. Good integration with other software (e.g., Sage)<br>- Vehicle tracking and management features | Some advanced features require additional fees |

[2] SaaS: Software as a Service (web-based software with a subscription rather than a one-time licence fee).

[3] Transition énergétique Québec, a government corporation founded in 2017 to support and finance the energy transition in Quebec.

**Functional comparison**

| Feature | AgroTaxi | La Charrette | Workwave | FasterCOM | GoMove | Progres sionLIVE |
|---|---|---|---|---|---|---|
| **Route Optimization** | ✗ | ✗ | ✓ | ✓ | ✓ | ✓ |
| **Real-time tracking** | ✓ | ✗ | ✓ | ✓ | ✓ | ✓ |
| **Interface for delivery drivers** | ✓ | ✗ | ✓ | ✓ | ✓ | ✓ |
| **Consideration of constraints (time, volume)** | ✗ | ✗ | ✓ | ✓ | ✓ | ✗ |
| **Data export** | ✗ | ✗ | ✓ | ✓ | ✓ | ✓ |
| **Cost** | Variable (per delivery) | Unknown | High | Medium to high | Medium | Medium |
| **Local development** | ✓ | ✗ | ✗ | ✓ | ✓ | ✓ |

## 4.4. Establishing fair pricing to ensure the project's viability

In a shared transport project, the question of ensuring **fair cost** sharing among partners is essential to setting appropriate pricing for fthe service to be viable (Quebec Reference Centre for Agriculture and Agri-Food [CRAAQ], 2008).

For the transportation fee to be fair and sustainable, a clear understanding of the total transportation costs is necessary **before calculating the price**. These costs fall into two categories:

- **Variable costs** are related to vehicle use and depend on the route (duration, distance and frequency).

- **Fixed costs** are defined as any expense related to the general management of the service, such as office rent, an Internet package, staff, and service management tools, etc. These costs do not vary according to activity levels, the number of trucks, or whether they make 0 or 1,000 deliveries in a week. They must be distributed evenly across all trips made by the vehicle.

Total cost of a trip = Portion of fixed costs + Variable costs of the trip

*Note: Total transportation costs can be expressed on the basis of an entire year of activity or an individual delivery. For a given year, a total cost model for an organization entirely financed by transportation activities must* ***equal the total expenses recorded in its financial statements****. This will show how much revenue will be needed to cover the expenses related to the use of the truck (variable costs), as well as to pay for office and warehouse rent, management team salaries, etc. (fixed costs).*

## Estimating fixed costs

In order to accurately assess all fixed costs for a given year, it is recommended to work from the **financial statements** and identify each expense as either fixed or variable.

In the early stages of a project (such as a pilot project), fixed costs may be limited to vehicle insurance costs and the salary of the person responsible for coordinating deliveries and collaboration with partners. However, as the project grows, other costs are added:

- Administrative tasks (e.g., invoicing, payment management);
- Purchase of or subscription to digital tools (e.g., planning software, collaborative platforms);
- Coordination costs, which increase with the number of partners and trips.

Once the fixed costs have been identified, they can be added together to obtain the **annual total**. These can then be allocated to each delivery, so that all partners pay a fair share based on their use of the service.

However, an important question remains: How should fixed costs be allocated across the different trips that will be made? If I make more deliveries, how much revenue do I need to generate to cover both variable costs and fixed costs?

To answer this question, the activity-based costing method suggests dividing the total fixed costs over a given period (e.g., one year) by a **representative trip unit** for the vehicle or fleet of vehicles in question over the same period. This unit could be the **number of hours the truck is used**, the **number of deliveries made**, or the number of **kilometres traveled**. If we choose the number of hours the truck is in use, for example, we obtain a **fixed cost per hour of truck use**.

Fixed cost per hour = Annual fixed costs ÷ Total annual hours of truck use

Fixed cost per delivery = Annual fixed costs ÷ Annual number of deliveries

Fixed cost per kilometre = Annual fixed costs ÷ Total annual kilometres travelled of the vehicle

*Note: The final choice of the most appropriate unit of activity necessarily involves an element of subjectivity, but the calculation does not need to be entirely precise. The objective is to determine the rate that should be set for a fictitious delivery in order to cover the associated fixed costs and avoid operating the project at a loss.*

## Estimating variable costs

Variable costs are costs that change either **over time** or **based on kilometres traveled**.

**Time-based variable costs**

- Delivery team salaries;
- Equipment rental costs (if applicable).

**Kilometre-based variable costs**

- Fuel costs (or energy costs for electric vehicles);
- Vehicle depreciation (if the vehicle is not considered fully depreciated);
- Maintenance costs.

To calculate the cost of an individual delivery more accurately (e.g., a delivery to a new customer), you can add together a **variable hourly cost** and a **variable cost per kilometre**.

Variable cost of a trip = Variable hourly cost × [Hours required for delivery] + Variable costs per kilometre × [Kilometres required for delivery]

*Note: For an even more accurate calculation, you can convert a variable hourly to a variable cost per minute by dividing it by 60. This enables you to calculate the variable cost associated of a delivery that adds as little as one minute to a truck journey.*

## Assessing the level of accuracy required for the project

Summarizing the two previous points, we can therefore deduce that:

Total estimated cost of a trip =
Fixed costs per trip unit x [Number of trip units]
+ Hourly variable cost × [Hours required for delivery]
+ Variable costs per kilometre × [Kilometres required for delivery]

However, the calculation can be simplified by slightly reducing its level of accuracy.
One simplification option is to add the annual variable costs in your financial statements and divide them by the usual kilometres traveled.

Total estimated cost of a trip =
Fixed costs per trip unit × [Number of trip units]
+ Total variable costs per kilometre × [Mileage required for delivery]

Another option for simplifying the calculation, for small projects for example, is to include certain variable costs in the fixed costs, as they do not fluctuate greatly depending on vehicle use. For example, if the project has its own vehicles, insurance, depreciation, and maintenance costs could be considered fixed costs. If drivers are paid full time, regardless of the hours actually spent on the road, this cost could also be added to the fixed costs.

Total estimated cost of a trip =
Fixed (and semi-fixed) costs per trip unit x [Number of trip units]
+ Fuel cost per kilometre × [Kilometres required for delivery]

*Note: As fuel costs fluctuate, it is advisable to estimate the cost based on the annual average. You can also include a mention of possible price adjustments in the event of a sharp increase in fuel prices.*

## Building a fair pricing structure

Once the fixed and variable costs have been identified and the **total transport cost** model has been developed, the **delivery rate** to charge partners can be determined.

However, **there is more than one pricing formula**, and you must decide which one is most appropriate. It must be **financially viable and easily applied** to the project in question. **Advanced planning and close collaboration** between partners are necessary to explore the different options and select the most suitable one (Frisk et al., 2010).

### Direct pricing

In this pricing model, delivery costs are determined by adding a percentage margin to the total transportation costs calculated above.

Delivery rate = Total estimated cost of a trip + Target margin

In this formula, the total transportation cost is calculated as described above, based on fixed and variable costs, according to the chosen formula.

The **target margin** is the desired difference between the revenue generated by the delivery rate charged and the estimated delivery costs. The actual margin can vary greatly, ranging from 15% to 200%. Some deliveries may achieve a higher margin, while others may achieve a more modest margin, or even a negative margin. The important thing is that, overall, the margins on deliveries cover the expenses and the desired or required level of revenue for the project. These terms must be determined transparently and collaboratively so that everyone understands and agrees with the principles on which the transport service pricing is based.

*Please note that even for a non-profit project, it is **important to always set a target margin**. Bear in mind that the total cost of the trip is an estimate and may therefore be higher or lower than expected. If the actual annual vehicle costs are higher than expected (due to repairs, increased insurance costs, etc.), the rates may not be sufficient to cover these costs. In this case, the actual margin would be negative and the project would operate at a loss. If the margin is positive, however, a surplus (or "profit") is realized, which can be used as a cushion or reinvested in the project.*

Pricing can also be calculated based on a fixed rate per delivery. While a fixed rate per delivery may sometimes result in the cost of a delivery exceeding the revenue generated by this pricing model, the overall goal is that, **for all deliveries combined**, the revenue generated by this pricing model will exceed the total cost of the deliveries.

To overcome the limitations of a fixed delivery rate, it is possible to vary the rate according **to delivery zone,** applying a higher rate for deliveries that are further from the truck's departure point. When estimating the fixed rate for each delivery zone, it is best not to underestimate the total average cost in order to avoid losses (for example, by allocating an average distance that is higher than that of each zone).

Fixed delivery rate = Estimated total average or higher cost [for an average trip in a given delivery zone]

### Profit margin pricing

This pricing model follows the same logic as that used by many food distribution services. A percentage margin is taken from product sales made by a producer. For instance, if a producer sells $1,000 worth of products to a restaurant, the distributor will take 20% of that amount to finance their warehousing and transportation activities. This type of pricing is often associated with a minimum sale, which defines the income threshold, for an average delivery. At this level, the distributor can carry out all its storage, order preparation, delivery, and administrative activities, while ensuring that it does not operate at a loss (Ministère de l'Agriculture, des Pêcheries et de l'Alimentation du Québec [MAPAQ], 2022).

Product sales revenue × Profit margin = Revenue accruing to the hub for its activities

Transportation costs = Fixed costs + Variable costs

### Cooperation between partners

In a pooled transportation pilot project, calculating transport costs enables each partner to clearly identify the value of their contribution to shared services. For instance, a partner responsible for making deliveries as part of the pilot project will be able to communicate the remuneration due to them clearly and transparently. Similarly, a partner responsible for warehousing or project coordination can ensure that they are compensated fairly for the costs incurred in carrying out this work.

Consequently, the actors involved in a joint project can therefore build a cost model specific to the project, ensuring that each contribution made is duly compensated.

*Note: If the services provided under the partnership include warehousing and order preparation, these can be assessed as variable costs that fluctuate according to order* ***volume****. **The unit of activity** by which to divide these costs could be a volume unit, such as the number of boxes associated with orders, or the monetary value of products sold.*

### Vehicle rental rate

If the pilot project involves vehicle sharing between partners rather than providing a delivery service, the pricing structure will need to be adjusted. Users of the shared vehicle will need to be particularly diligent in reporting **kilometres travelled** and any damage incurred during use.

Therefore, a pricing solution could be based partly on a **per-kilometre rate**, using the kilometres travelled by a partner to calculate:

- **the routine maintenance** of the vehicle;
- **vehicle depreciation**, unless it is considered fully depreciated;
- the **cost of fuel**, if this is not paid directly by the vehicle users.

If the vehicle is subject to a **rental or financing cost** from a supplier outside the partnership (e.g., a car dealer or rental company), the rental rate for partners should include a **daily rental rate** in addition to the per-kilometre rate.

For example, a vehicle subject to a monthly payment of **$900** would have its **daily rate** set at **at least $30 per day** ($900 per month ÷ 30 days in a month = $30 per day).

A formula for the rental rate of a shared vehicle could therefore be expressed as follows:

Rental rate
=
(Daily rate × Number of days of use)
+
(Per-kilometre rate × Number of kilometres traveled)

## Use a suitable calculation tool

Structured projects (such as logistics hubs or shared delivery services) can use a **transport cost calculator** to gain a better understanding of their actual costs and adjust their rates accordingly. This ensures that **expenses are shared fairly** among partners and that **the service remains financially viable**.

### Toolkit: Example of a transport cost calculator

In the toolkit in Appendix III, you will find a template for calculating transport costs, developed by Coop Carbone and used by SALIM program partners. To make it easier to use, a downloadable link is also provided.

This tool can be adapted to the specific circumstances of your project.

## 4.5. Project visibility and promotion

Good visibility is essential for promoting the project's impact, generating support and developing new partnerships. Effective communication is a strategic tool whose rigour and consistency directly influence the scope and impact of the project. Effective communication is based on several complementary components that can be adapted according to the target audiences and chosen platforms (Page, 2017).

### Positioning and communication strategy

It is important to consider how the project will be presented. Consider the distinctive elements of your project, including its mission, vision, and values. This information can be used to create a website to help people find your project. Next, identify the target audiences you want to communicate with (e.g., potential customers, new partners, funders, the general public, etc.). This will help you create messages that will resonate with them, find the best ways to reach them, and determine the most suitable communication channels (e.g., publications, videos and visuals). It is also advisable to appoint a contact person for media inquiries and to prepare key messages and, possibly, evocative results.

Creating a strong visual identity will lend credibility to your initiative. Consider hiring a professional graphic designer to create a logo and graphic chart (colours, fonts and style elements). However, these services can be expensive. If you cannot afford this, there are a few useful platforms (e.g., Canva).

### Representation in the ecosystem

Participating in events and meetings provides an opportunity to establish links with activity or business partners, support structures, and more experienced shared transport initiatives that have encountered similar challenges.

Examples include the Espace Cuisine webinars (organized by the Conseil SAM [système alimentaire montréalais]) and the Commun'assiette meetings, which focus on local sourcing for institutions.

### Social media presence

**Facebook**
This platform primarily attracts an audience aged 30 to 65, with a significant number of interest groups focused on local and sustainable food. These communities can be effective channels for B2C (business-to-consumer) campaigns.

**Instagram**

Instagram is particularly relevant for reaching restaurateurs and other stakeholders in the food sector. It allows you to develop influencer marketing strategies and share high-quality images that showcase the project. For instance, promoting partner producers could enhance the project's image and generate interest among a professional clientele.

**LinkedIn**

LinkedIn is the ultimate professional network for establishing links with institutional clients or support partners. Success stories, accompanied by concrete data or performance indicators, find an audience there that is sensitive to the social, economic, or environmental benefits of a project.

**Newsletters**

Newsletters help to establish regular contact with an engaged community.
To broaden the message's reach, they can be distributed in collaboration with organizations that are already well established in structured networks, such as the Conseil SAM, Équiterre, and the Aliments du Québec certification mark.

### RECOMMENDED TOOLS FOR MANAGING PUBLICATIONS AND SOCIAL MEDIA

Solutions such as Hootsuite allow you to centralize publication management and analyze social media performance. Other tools, such as Mailchimp, make it easy to send newsletters or targeted email campaigns.

## Digital presence of our partners' projects

The projects cited as examples have adopted different communication strategies, using a variety of digital tools tailored to specific audiences. Each platform offers distinct opportunities to raise awareness of the project, generate interest, and strengthen the project's roots in the local community.

L'aube FOOD HUB

ÉPICENTRE SAINT-HENRI

CDC PLATEAU-MONT-ROYAL

Mutuelle d'approvisionnement des marchés solidaires

# 04 Pilot the shared transport project

## The truck as a tool for visibility

In a pooled transportation project, the truck is much more than just a logistical tool. As it is constantly on the road, it can be used to promote the project to new partners or potential users, providing strategic visibility. This can be particularly useful when there is limited or no direct link between partners and customers or users.

The truck can help raise awareness of the project, its values, and the people or organizations involved. For instance, if a logistics hub eliminates direct contact between producers and their commercial customers, it can serve as a visual relay for consumers, ensuring a strong local presence.

The lettering should be clear and legible from a distance, highlighting key themes such as local food, solidarity, and ecological transition. If the name of the hub does not clearly convey its purpose, we suggest adding a slogan or motto that explicitly emphasizes the connection between producers and consumers. For example:

> “Local and solidarity-based food, from farm to plate.”

The truck can also be used to promote the project’s members. Displaying the logos of producers, partners, or cooperatives that are members of the hub reinforces collective recognition (Collectif Récolte, 2025b). We recommend including a space to thank financial partners, especially if the vehicle was funded by a program or organization that requires public visibility.

04 Pilot the shared transport project

**TIPS AND TRICKS:**

- Work with a graphic designer to ensure that the visuals meet the technical and aesthetic standards required for display on a truck such as colour codes, formats, dimensions and resolution.
- When it comes to vehicle wraps, use a supplier that offers a two- to three-year warranty against defects such as delamination or discolouration.

For a project offering vegetable baskets to the public, it would be a good idea to put a QR code on the vehicle. This would allow quick access to the hub's online platform. Adding a visible promotional code to the vehicle could also encourage people to visit the ordering site.


# 05 Evaluate the project's performance results and impact

In order to ensure the relevance and effectiveness of a pooled transportation project, regularly monitoring its performance and impact is key. This step enables you to verify whether the expected benefits of shared transportation are being realized. There are two complementary objectives to this step:

- The management and continuous improvement objective is to adjust practices based on the data collected.
- The communication and advocacy objective is to demonstrate the project's value to partners (e.g., financial partners and future members).

Chapter 5 of this guide (Collectif Récolte, 2026) examines the evaluation of project performance and impacts in detail.

Specifically, this involves identifying indicators that correspond to the aforementioned two objectives, which are presented together in a single dashboard (or results matrix).

Examples include:

- **Kilometres saved** through shared transportation, compared to individual trips.
- **Average time** per delivery, which is useful for assessing real efficiency gains.
- **Savings** on transportation costs when comparing shared deliveries with previous individual deliveries.
- **Time savings** for the various partners involved.

Once the indicators have been defined, it is important to develop straightforward data collection tools and to carefully plan the collection of all the logistical and financial required to document these indicators. Planning continuous collection is crucial, as transportation-related data is very difficult to retrieve retrospectively (for example, how can you know how long travel takes if it has not been continuously documented?). This information may include the **duration and distance of each trip**, as well as the **associated costs**. This data provides a better understanding of needs and is used to calculate the selected key performance indicators.

Adding **qualitative elements** to this quantitative data provides a more nuanced understanding of stakeholders' experience. Of particular interest are:

- The **level of satisfaction** of partners and users.
- The **perceived reliability** of the service (punctuality, consistency, etc.).
- The **general perception** of the quality and value of the shared transportation service.

# 06 Prepare for sustainability and, if necessary, scaling up

If a pilot project is successful, it is important to quickly plan the next steps to ensure its continuity.

## 6.1. Financial arrangements

Of course, **the necessary investments** will have to **be evaluated**, taking into account the contribution and reimbursement of each partner. Examples include the purchase of a refrigerated vehicle, storage equipment (e.g., a cold room) and management software licences). The next step is **the search for funding**, through local economic development funds, government grants, loans and support from private actors. In 2021, Collectif Récolte produced a guide to help with this: *Guide to the financing ecosystem for start-up agri-food projects*.

A balance in the financial package between independent revenue and subsidies will provide greater stability for the project. Ideally, subsidies should primarily support initial investments, with subsequent phases of activity funded primarily by independent revenue from pricing and other monetizable activities. Surpluses should be generated to ensure the project's development.

## 6.2. Establish stable governance

When it comes to considering the growth of the project, we recommend establishing stable, consistent, and appropriate governance that can support the development of the initiative while maintaining cohesion among partners.

The question of governance can be summarized as follows:

- What kind of relationship do we want to establish between the partners?
- Which organization will lead the project?
- How will decisions be made with the partners involved?
- How will changing needs be taken into account?

There is no single ideal legal form for structuring such a partnership (Collectif Récolte, 2023). Several options are possible, each with their own characteristics:

> Depending on its form, **a cooperative** can bring together different types of members such as agricultural producers, users of a shared transportation service, as well as workers and support members, as is the case with a solidarity cooperative. In all cases, the members collectively own the cooperative and are at the heart of its decisions and direction (Comité sectoriel de main-d'œuvre de l'économie sociale et de l'action communautaire [CSMO-ÉSAC], 2019).

# 09 Prepare for sustainability and, if necessary, scaling up

**Non-profit organizations (NPOs)** offer greater flexibility in terms of governance rules and membership. Unlike a cooperative, members do not hold shares, and surpluses are generally reinvested in the organization's mission rather than being redistributed to members (CSMO-ÉSAC, 2007).

A **business group** can also be formalized through a multilateral contract or a series of bilateral contracts, which specify the roles and responsibilities of each party, the partnership's financial terms, and the conditions for joining or leaving the partnership.

Some associated companies may also choose to jointly hold **shares in a new private company** created specifically to carry out the project. This gives them a dual relationship with the company, as both owners and customers of the service offered.

Regardless of the chosen structure, any form of partnership relies on a high level of trust between those involved. To achieve this, it is essential to anticipate and manage risks from the design phase onwards (for reference, see Table 3, Risks related to the relationship between partners). Involving all stakeholders in the decision-making process regarding the governance structure through a participatory and transparent approach is crucial for finding an organizational structure that suits everyone and allows for innovation and ownership of the project (La Fonda, 2022).

Governance is a continuous and dynamic process that enables everyone to contribute to the shared project, prioritize the group's actions, and anticipate and avoid potential issues. It is essential to establish a realistic and concise action plan that leaves room for flexibility and uncertainty in order to facilitate dialogue, improve communication, and distribute responsibilities effectively (CSMO-ÉSAC, 2007). A variety of tools are available to support the democratic life of your project (La Fonda, 2022; Communagir, n.d.; Centre des organismes communautaires, n.d.).

**RESOURCE ON INSPIRING MODELS AND APPROACHES:**
FICHE SYNTHÈSE : GOUVERNANCE PARTAGÉE POUR LA SÉCURITÉ ALIMENTAIRE, COLLECTIF RÉCOLTE, 2023
(This document is only available in French)

# The example of L'Aube Food Hub

## Facilitating factors and challenges encountered

**L'Aube Food Hub** is a project co-created with Collectif Récolte as part of the SALIM program. We were therefore on the front lines to observe its implementation and development. Here we present a more in-depth portrait of its shared transportation model.

### How it works

The shared transport model set up by L'Aube is based on flexibility and collaboration. The hub offers its member farms a turnkey delivery service, providing a truck and a dedicated driver. When the truck is not in use by L'Aube, producers can reserve it, with or without a driver, for their own deliveries. Since 2023, outside of the agricultural season, the service has also included the group collection of food from Moisson Montréal, thereby meeting the needs of local community organizations while optimizing the use of the vehicle. Deliveries are organized in loops to reduce costs, individual travel, and greenhouse gas (GHG) emissions associated with food transportation. Reservations are made via a form, submitted two weeks in advance.

### Facilitating factors

- **Transparent pricing**: Implementation of a clear rental rate chart based on kilometres travelled and transport time.
- **Planning with partners**: Agreements established at the beginning of the season with user farms, accompanied by rental protocols.
- **Diversification of use**: A service diversification strategy that allows for better truck profitability, especially in the off-season.
- **Versatility of the driver**: In addition to driving, the driver is responsible for overall logistics, including route preparation, loading, delivery, vehicle maintenance, parking, billing, and partner relations.

### Challenges encountered

- **Winter mobilization**: Less commitment from community partners during the winter season.
- **Perception of cost**: Rates are sometimes perceived as too high.
- **Limited use of the service**: Few truck rentals, raising sustainability issues.
- **Mixed driving model**: The truck can be used either with a driver employed by L'Aube Food Hub, or rented with an external driver, which can complicate coordination and management.
- **Insurance issues**: Difficulties related to coverage when an external driver is involved.
- **Winter logistics**: Parking can sometimes be difficult to manage during the winter.

# 06 Prepare for sustainability and, if necessary, scaling up

### Lessons learned and advice

- **Start with the needs of the community**: Identify potential partners from the outset to build a service that is tailored to their needs.
- **Anticipate costs**: Develop a tool to calculate vehicle usage costs to help with pricing and decision-making.
- **Remain flexible**: The flexibility of the model (internal or external driver, rental according to demand) enables adaptation of the service, but good coordination is required.

# Appendices

## Toolbox

### Appendix I: Sample questionnaires for identifying partners' needs

Two examples of questionnaires are provided below that can be used to identify the needs of potential project partners. Please note that it is essential that you adapt the questions to the reality of your project. The examples provided are for information purposes only. We invite you to use them and include the following statement: [Questionnaire adapted from an example provided by Collectif Récolte in the *Decision Support Guide for Food Transport Vehicles, Chapter IV*].

Example 1: Questionnaire - Collective delivery project for agricultural producers
Example 2: Questionnaire - Shared delivery project for community organizations in a given area (RCM, neighbourhood, etc.)

Would you like assistance in developing a questionnaire tailored to your specific needs? Contact us: Request form – Collectif Récolte

#### Questionnaire - Collective delivery project for agricultural producers

This questionnaire aims to gain a better understanding of everyone's needs and expectations for a shared delivery vehicle this summer. Based on the responses, an action plan will be proposed to interested steering committee members.

- Please provide the name of your organization, the name of the person in charge and their contact details.
- Considering your activity, what are the most important **characteristics** of a delivery vehicle? Please specify the load volume, transport temperature, and any other conditions that need to be met.
- If a shared delivery vehicle were made available to you, how **often** would you like to use it and at what **time(s)**? For example: Saturdays, Wednesdays, and Sunday mornings.
- For each use, what **time range** would you need it for? For example: from 6 a.m. to noon, from 6 p.m. to 3 p.m. the next day, etc.

- Could you list the stops on your route, **from A to Z**, to give an idea of the areas or neighbourhoods to be served? For example: loading at the farm, delivering to the warehouse, delivering to XYZ market, delivering to ABC retailer, collecting packaging materials, and returning to the farm.

- If there were a shared delivery vehicle, **what period of the year** would you need it for? For example: from early June to late October, year-round, etc.

- Sharing a vehicle requires a certain amount of **flexibility**. Do you think this would be feasible for you? For example: If user A needs the vehicle for a delivery on Tuesday evening and you need it on Wednesday morning, could your delivery be made on Tuesday evening to optimize logistics?

- Would you prefer to deliver your products yourself, or would you be willing to use a professional delivery person (**service provider**) to handle it? If not, would it be appropriate for deliveries to be made by another producer who is a member of the group (on a rotating basis, for example)?

- If you are interested in the service provider option, what would your **requirements** be?

- Have you ever used a service provider to deliver your products to your customers? If so, how did it go?

- What type of packaging do you use for transporting your goods? Are your products transported on **pallets**?

- What do you think about having a **lift** on the truck?

- Are there any other important points to consider?

- Should the shared vehicle be a "**green**" delivery vehicle (hybrid or electric)?

- Do you have a **budget** available for this shared vehicle test phase?

# Questionnaire - Shared delivery project for community organizations in a given area (RCM, neighbourhood, etc.)

The ABC project aims to develop a hybrid delivery system (truck and bicycle) in the XYZ area. This service will be offered to food security organizations to help them better serve people with reduced mobility who are unable to travel to pick up their food baskets and/or meals.

- Please provide the name of your organization, the name of the person in charge and their contact details.
- **How many** food **boxes** and/or fruit and vegetable baskets do you distribute each week?
- **How many meals** do you provide each week?
- What **days and times** do you distribute food?
- Do you need a vehicle to **collect food from Moisson Montréal**?
- Do you **deliver food boxes** and/or meals?
- Is your delivery service **temporary or permanent**?
- **Who** is your delivery service intended **for**? (Everyone? People with reduced mobility? Residents of the XYZ area?)
- What **means of transportation** do you currently use for deliveries?
- **Who** currently handles deliveries?
- How much do you estimate your organization's **weekly delivery costs** to be?
- How many **deliveries** do you estimate your organization needs **for people with reduced mobility**?
- Would you like to offer delivery of your baskets and/or meals to people with reduced mobility residing in the XYZ area?

## Appendix II: Collaboration agreement template

The collaboration agreement template below was developed by Collectif Récolte. We encourage you to use it and adapt it to your specific needs, *however, please add the following statement to your agreement to acknowledge our work: [Collaboration agreement adapted from an example provided by Collectif Récolte in the Decision Support Guide for Food Transport Vehicles, Chapter IV]*

Do you need Collectif Récolte to accompany you? Contact us: Request form – Collectif Récolte

# COLLABORATION AGREEMENT

**[Name the lead organization]**
**[Address of the lead organization]**

Represented by: **[Name of representative]**
**Collaborator**
Name: **[Full name of collaborator]**
Address: **[Address of the collaborator]**

# CONTEXT

[Brief explanation of the mutualization project]

This collaboration agreement relates to **the food transport and delivery component**.

The objectives of the project are as follows:

- [List the objectives]

The members of the committee responsible for this component undertake to share [complete the sentence, e.g.: human resources and a vehicle for food supply]. The fixed and variable costs associated with this service will be shared among the user members as follows: [specify].

# DESCRIPTION OF THE COLLABORATION

The collaborator commits to actively participating in the project. Their tasks may include, but are not limited to, the following:

[Some examples:

- participating in the decision-making process and implementation of the project;
- attending meetings on the development and progress of the project;
- monitoring the progress of the project with local committee members;
- using the transportation and delivery service once it is operational;
- contributing to the collection of data required to monitor indicators for evaluating the project's success.]

The lead organization, through its coordination team, undertakes to:

[Some examples include:

- coordinating the shared vehicle project;
- ensuring that the resolutions adopted by the committee are implemented;
- advancing matters between committee meetings;
- liaising with external partners;
- renting or purchasing the shared vehicle;
- hiring a driver dedicated to the project;
- collecting quarterly monitoring data from collaborators and the driver, analyzing it, and communicating the highlights to collaborators.]

The hired driver will be responsible for:

[Some examples include:

- driving the vehicle to make food deliveries;
- loading and unloading the vehicle;
- ensuring the vehicle is clean and in good working order;
- participating in the development of the project in collaboration with the coordination team;
- building relationships of trust with community organizations;
- communicating logistical information to the lead organization and partner organizations;
- keeping the travel log up to date to facilitate the collection of monitoring data;
- Keeping information on the capacity and supply needs up to date.]

## NON-SOLICITATION / NON-COMPETITION

*Obtain legal advice to draft these clauses in accordance with the needs of the participating partners and legal guidelines.*

# CONFIDENTIALITY

The collaborator must, in relation to any decision that they must make, report to the lead organization any situation in which they find themselves in a conflict of interest or apparent conflict of interest.

The collaborator acknowledges that all documents, materials, information, files, employee lists, management tools, correspondence, and other relevant documents (regardless of the medium) relating to their duties or the project are and remain the exclusive property of the lead organization or partner participants, as applicable, and must be returned in full at the end of the agreement, regardless of the reason.

During the term of this agreement and thereafter, the collaborator agrees not to reproduce any of these documents or allow them to be reproduced, in whole or in part, without first obtaining the express written consent of the lead organization.

The collaborator agrees to continue to act with loyalty and confidentiality towards the lead organization and its participating partners for a reasonable period after the end of the agreement. During their participation and after the end of the agreement, this person agrees not to disclose, use, transmit, disseminate, reproduce, sell, transfer, give, circulate, or otherwise distribute to any person, or otherwise make public any confidential verbal or written information obtained in the performance of their work or in connection with their work or obtained after the agreement ends, unless they obtain the prior written and explicit consent of the lead organization.

In the event that the collaborator is required by law or court order to disclose any confidential information during their participation or after the end of the agreement, that person must first notify the lead organization in writing. This will allow sufficient time for the organization to control the content and scope of the disclosure or to obtain an order to protect any confidential information.

# AMENDMENTS

Any amendment to this agreement may be made by mutual agreement between the parties and must be recorded in writing.

# TERMINATION

In the event of non-compliance with the commitments set out in this agreement, either party may terminate this agreement by giving the other party 10 business days' written notice. Any amount owed by the collaborator to the lead organization must be paid in full prior to termination of the agreement.

# LIST OF APPENDICES

- Taking Care of the Truck Policy
- Monitoring indicator grid and logbook template
- Rate schedule
- Contractual terms and conditions for drivers and civil liability insurance terms and conditions
- List of resources used by the various collaborators
- Incident report

# DURATION OF THE COLLABORATION

Start: **[Start date]**
End: **[End date]**

# SIGNATURES

**Lead organization**
Name: _____
Date: _____

**Collaborator**
Name: _____
Date: _____

# Appendix III: Transport Cost Calculator (developed by Coop Carbone for this guide)

You can download this tool and adapt it to your needs. However, please add the following statement to your agreement to acknowledge our work: [Adapted from the transport cost calculator tool shared by Coop Carbone in the Decision Support Guide for Food Transport Vehicles, Chapter IV].

Here is the link to download it: **Access the tool** *(only available in French)*

This tool is based on the **activity-based costing** methodology presented above and can be used to evaluate actual costs over a given period as well as to forecast the costs of hypothetical deliveries.

The scale of the tool is highly adaptable, with a spreadsheet to list the costs of a single delivery (one line in the table), a complete vehicle route, a week of activity, or even an entire year.

To use the tool, you must first set up your **cost structure** in the **[1- Calculation Parameters]** sheet. Depending on the chosen pricing type, it then provides two calculators:

- For **minimum orders** in the [2A - Cost-Benefit Calculation. with Mins.] sheet.
- For **direct pricing** in the [2B - Cost-Benefit Calculation for Pricing] sheet.

The **[Depreciation Calculation Details]** sheet provides a methodology and resources for determining the depreciation rate of a vehicle.

The **[Costs - Data Sources]** sheet provides a checklist for determining the source of the various cost parameters and delivery data to be entered in the tables (duration, distance travelled, etc.).

*Please note that this calculation tool is not perfectly suited to all situations. For example, a project that acquires new vehicles during a given year will see its cost structure change significantly, rendering the previous year's cost structure obsolete. Users of this tool who rely on it most often should customize it so that its calculation methods reflect their circumstances.*

## Appendix IV: Additional resources for further reading


- Abbad, H. (2014). Pooling: Myth or Realities? Logistics & Management, 22(2), 41-50. https://doi.org/10.1080/12507970.2014.11517051

- Azrour, A. (2022). Mutualisation logistique et de mise en marché en contexte de culture maraîchère au Québec : recensement des pratiques et des facteurs les influençant [Master's thesis, HEC Montréal]. Biblios. https://biblos.hec.ca/biblio/memoires/azrour_amina_m2022.pdf

- Conseil québécois de la coopération et de la mutualité. (s.d.). Formation en transport et logistique pour les pôles logistiques agroalimentaires en économie sociale. CQCM. https://cqcm.coop/initiatives/poles-logistiques-agroalimentaires

- Mundler, P. (2023). Les fermes en circuits courts alimentaires au Québec : état des lieux, perspectives et défis. Organisations & territoires, 32(1), 6-31. https://doi.org/10.1522/revueot.v32n1.1550

- Pôle d'économie sociale Vallée-du-Haut-Saint-Laurent. (2023). La mutualisation des ressources humaines : outil de réflexion pour gestionnaires. Projet réalisé en collaboration avec un groupe d'étudiants de l'Université de Sherbrooke, dans le cadre du Programme d'intervention dans la collectivité promu par la Chaire Lemaire. https://economiesocialevhsl.org/wp-content/uploads/2023/10/Guide-pratique-Mutualisation-des-ressources-humaines.pdf

- Regroupement des centres d'artistes autogérés du Québec. (2019). Le Petit Guide orange du partage des ressources et de la mutualisation. Bibliothèque et Archives nationales du Québec. http://www.cqam.org/wp-content/uploads/2019/12/rcaaq-petit-guide-mutualisation.pdf

- Rouleau, A. (2024). La mutualisation, un levier de résilience pour le système alimentaire alternatif montréalais? [Master's thesis, Université du Québec à Montréal]. Archipel. http://archipel.uqam.ca/id/eprint/17505

- Territoires innovants en économie sociale et solidaire. (2023). La mutualisation : 6 étapes pour un partage réussi. Bibliothèque et Archives nationales du Québec. https://tiess.ca/download/documents/TIESS-MUT-Guide_mutualisation.pdf

- Vincent, M. (2024). Étude de cas évaluant la possibilité d'instaurer une mutualisation logistique entre deux entreprises volontaires faisant partie du Parc industriel régional de Sherbrooke et ses environs [étude de cas de maîtrise, Université de Sherbrooke]. Savoirs UdeS.https://usherbrooke.scholaris.ca/items/c5986a8d-0a00-452f-926f-02fcc2e4632d

# Bibliography


Centraide. (2024). *About*. DATAide. https://en.dataide.ca/
Centre for Community Organizations. (n.d.). Toolbox. COCo. https://coco-net.org/boite-a-outils/?lang=fr

Collectif Récolte. (2023). *Fiche synthèse : gouvernance partagée pour la sécurité alimentaire*. Espace Cuisine. https://ressources.recolte.ca/wp-content/uploads/2024/03/fiche-synthese-gouvernance-rdvaals-iv.pdf

Collectif Récolte. (2024). *Launching a Collective Food Procurement Project: Lessons Llearned by the Mutuelle d'approvisionnement des marchés solidaires (MAMS)*. SALIM Program.https://ressources.recolte.ca/en/ressource/launching-a-collective-food-procurement-project/

Collectif Récolte. (2025a). Chapter III - Various pooled transportation models. In *Decision Support Guide for Food Transport Vehicles*. SALIM Program.https://ressources.recolte.ca/wp-content/uploads/2025/08/decision-support-guide-iii.pdf

Collectif Récolte. (2025b). *Rapport d'étape de la mesure d'impact ÉpiCamion, période 2023-2024* [unpublished document]. SALIM Program.

Collectif Récolte. (2026). Chapter V. In *Decision Support-making Guide for Food Transport Vehicles* [document in preparation]. SALIM Program.https://ressources.recolte.ca/en/ressource/decision-support-guide-for-food-transport-vehicles/

*Comité sectoriel de main-d'œuvre de l'économie sociale et de l'action communautaire. (2007). Boîte à outils : La gouvernance démocratique - COOP*. https://www.csmoesac.qc.ca/outils-et-publications/gouvernance-democratique-obnl

*Comité sectoriel de main-d'œuvre de l'économie sociale et de l'action communautaire. (2007). Boîte à outils : La gouvernance démocratique - NPOs*. https://www.csmoesac.qc.ca/outils-et-publications/gouvernance-democratique-obnl

Communagir. (n.d.). *Facilitation tools*. Communagir to go*Les outils d'animation*. Communagir pour emporter. https://communagir.org/contenus-et-outils/communagir-pour-emporter/les-outils-d-animation/

Centre de référence en agriculture et agroalimentaire du Québec. (2008). *Outil d'encadrement à la budgétisation*. CRAAQ. https://www.craaq.qc.ca/oeb/default.aspx?ID=48

Frisk M., Göthe-Lundgren, M., Jörnsten, K., and Rönnqvist, M. (2010). Cost allocation in collaborative forest transportation. European Journal of Operational Research, 205(2), 448-458. https://doi.org/10.1016/j.ejor.2010.01.015

Guay, J. (2024). Les clauses de non-concurrence et de non-sollicitation. *Le Blogue de l'Avocate devant le cabinet*. https://www.jenniferguayavocate.com/post/clauses-de-non-concurrence-et-non-sollicitation

Intact Insurance. (2025). *Commercial Vehicle Insurance*. Intact Insurance.https://www.intact.ca/en/business-insurance/coverage/commercial-vehicle-insurance

La Fonda. (2022). *Guide méthodologique du faire ensemble*. https://fonda.asso.fr/system/files/fichiers/Guide%20m%C3%A9thodologique%20du%20Faire%20ensemble%20-%20La%20Fonda_compress%C3%A9.pdf

Ministère de l'Agriculture, des Pêcheries et de l'Alimentation. (2022). *Fiche B : structure de prix*. https://www.mapaq.gouv.qc.ca/SiteCollectionDocuments/TransformationPortail/FicheB_Structure_prix.pdf

Mouvement québécois de la qualité. (n.d.). *Analyse SWOT (FFOM)*. Mouvement québécois de la qualité. https://www.qualite.qc.ca/ressources/analyse-swot-ffom/

Page, K. (2017). *Social Media Workbook for Community Organizations and NonProfits*. Centre for Community Organizations (COCo).https://coco-net.org/social-media-workbook-community-organizations-nonprofits/

Rentino-Parazelli, K. (2023, May 26). *Prêter sa voiture : quoi dire à son assureur.* L'actualité. https://lactualite.com/finances-personnelles/preter-sa-voiture-quoi-dire-a-son-assureur/

Société de l'assurance automobile du Québec. (2025). *Registering a Vehicle: Farm Vehicle Weighing 3,000 kg or Less*. Société de l'assurance automobile du Québec. https://saaq.gouv.qc.ca/en/vehicle-registration/registering-vehicle/tractor-or-other-farm-vehicle/farm-vehicle-weighing-3000-kg-or-less.

Union des producteurs agricoles. (2023). *Guide de la sécurité routière pour le monde agricole, 3e édition*. Bibliothèque et Archives nationales du Québec. https://www.upa.qc.ca/producteur/outils-et-ressources/lois-et-reglements/securite-routiere

Union des producteurs agricoles. (2014). *Aide-mémoire pour faciliter votre compréhension des règlements routiers.* https://pgq.ca/fileadmin/Documents/Securite_routiere/aide-memoire_securite-routiere_UPA.pdf

Decision Support Guide for Food Transport Vehicles: Chapter 4: Starting and running a pooled transportation project

**Written by** Gabriel Michaud (Coop Carbone) and Rachel Sylvestre (Collectif Récolte)

**Edited by** Isabelle Vandeplas, Dominique Lalonde, Judith Colombo and Emmie Garneau (Le Point final)

**Translated by** Lorraine Gagnon

**Layout by** Karolane Thibault

This document was produced thanks to the financial support of : Montréal Canada Montréal en commun DÉFI DES VILLES INTELLIGENTES

COLLECTIF RÉCOLTE

In collaboration with COOP CARBONE

5520 Chabot Street, Suite 401, Montreal (QC) H2H 2S7
514 360-1086 | info@recolte.ca | www.recolte.ca