

FINAL Recommendations

Paratransit Coordination Task Force

Action: This list of recommendations was unanimously approved with two abstentions by the Paratransit Coordination Task Force on February 16, 2005. However, specific recommendations may not have been approved by consensus. The majority-rule votes for these recommendations are noted.

GOAL #1 – THE SYSTEM WILL USE FUNDING AS EFFICIENTLY AND EFFECTIVELY AS POSSIBLE.

I. Issue: How to manage eligibility under various programs (clear criteria, centralized information and/or registration)

Short term recommendations:

1. Print Spanish and large print versions of the Guide to Specialized Transportation. (This action is already underway and should be complete by April 2005.)

Responsibility: RTC (or its committee, *See Goal 1, Issue II, Recommendation 2*)

2. Post the Guide on the RTC website in a manner that is Section 508-compliant making the information accessible to people with screen readers etc... (This accessibility is planned in RTC's current website redesign project.)

Responsibility: RTC (or its committee, *See Goal 1, Issue II, Recommendation 2*)

3. Develop a "cheat sheet" for use by service providers and related agencies to help direct riders to appropriate service providers. The sheet should include eligibility criteria and phone numbers and could be indexed to more complete information available in the RTC's "Guide for Specialized Transportation," ADA legislation or other detailed information. This could be done in collaboration with Community Bridges operating as the CTSA and other interested parties.

Responsibility: RTC (or its committee, *See Goal 1, Issue II, Recommendation 2*)

4. Designate an in-house expert within the major service providers (Metro and Community Bridges) to answer questions that an operator or scheduler is unable to address. This includes providing basic information and referral to other local transportation agencies.

Responsibility: Metro and Community Bridges

5. Ensure that all front line staff and telephone operators that deal with customers have a basic level of knowledge about local transportation options.

Responsibility: Metro and Community Bridges

6. Clarify the expectations regarding the level of knowledge and extent of the information and referral services to be provided.

Responsibility: Service providers and funders

Long term recommendations:

8. Research establishing a Mobility Management Center (or centralized information point) in Santa Cruz.

Responsibility: RTC (or its committee, *See Goal 1, Issue II, Recommendation 2*)

9. Research establishing a 511 telephone system in Santa Cruz County, similar to what currently exists in the San Francisco Bay Area, to provide transportation information including specialized transportation.

Responsibility: RTC (or its committee, *See Goal 1, Issue II, Recommendation 2*)

II. Issue: Available Funding and Resources

Short term recommendations:

1. Develop a process for determining duplication and report to the RTC annually. Input would be solicited from the RTC's advisory committee, funding agencies, social service agencies and specialized transportation service providers. This should include compiling a list of concrete examples of areas of duplication. The effort could be combined with the annual unmet needs process.

- a. Have funding agencies review the performance and use of funds for specialized transportation to make sure that duplication is being avoided and that service is provided as cost effectively as possible.

Responsibility: RTC and Metro

- b. Interested parties should be able to submit to staff examples of duplication. This could then be analyzed by relevant agencies, reviewed by the E/D TAC or RTC advisory committee and a report submitted to the RTC on ways to deal with these issues.

Responsibility: Paratransit TF, RTC staff, service providers (or its committee, *See Goal 1, Issue II, Recommendation 2*)

- c. Clarify various categories of "duplication." For example, a person may qualify for rides under many different programs. That's not duplication of rides, that is duplicate eligibility. MediCal rides vs. medical voucher rides are a totally different type of duplication.

Responsibility: Paratransit TF, (or its committee, *See Goal 1, Issue II, Recommendation 2*) and service providers

2. Redefine the RTC's advisory committee to empower it to play a stronger role in the oversight of paratransit services so that the committee's recommendations are taken seriously by both the RTC and Metro.
 - a. Create a structure that works mutually, where staffs can work together, where interested parties can work together to deal with issues that may arise that concern both of these services, whether it's the E&DTAC as its formed now or a revised E&DTAC or some other entity altogether. (* 9 to 3)

Responsibility: RTC & Metro

- b. Establish a structure that assures that the efficiency and duplication issues are dealt with effectively so problems are solved. This structure needs to have the respect and credibility with both the RTC and Metro. This would provide for continuity with the work that the Task Force has started. (* 9 to 3)

Responsibility: RTC & Metro

Long term recommendation:

3. Include review of available countywide funding and resources for specialized transportation as a sub-task of the Regional Transportation Plan update (every three years).

Recommendations: RTC

Short and long term recommendation:

1. Lobby state and federal representatives for waivers or policy changes to broaden the transportation options for MediCal/Medicare recipients. This could include providing fixed route bus passes for non-emergency medical trips such as is done in Florida.

Responsibility: Service providers and RTC

III. Issue: Coordination between paratransit services (ADA, TDA, other)

Short term recommendation:

1. Develop an effective information and referral system. (See recommendations I.3 and I.4.)

Responsibility: RTC, Metro, and Community Bridges

2. Develop a committee that is respected by all transportation players (or its committee, See Goal 1, Issue II, Recommendation 2)

Responsibility: RTC and Metro

3. Encourage Metro to continue meeting with agencies to accommodate group site needs, such as Stroke Center, Satellite Dialysis, senior centers and meal sites.

Responsibility: Metro

4. Set up a process whereby the Metro, the Community Bridges and other program operators meet on a regular (quarterly or semi-annual) basis to discuss service and eligibility issues in order to try and avoid potential duplication.

Responsibility: RTC (or its committee, *See Goal 1, Issue II, Recommendation 2*) to coordinate start up

5. Research roles and responsibilities for CTSAs throughout the state

Responsibility: RTC Staff (already complete and provided to Task Force 2/16/06)

6. Maintain the current designation

Responsibility: Community Bridges/RTC

Long term recommendation:

7. Explore feeder paratransit service options.

Responsibility: Service providers and RTC

8. Develop a long range strategic plan designating one public agency to consolidate (and potentially provide) services eliminating the need to coordinate service between multiple service providers.

Responsibility: RTC

9. Monitor the Long Range Strategic Plan developed by the state to incorporate relevant components.

Responsibility: RTC (or its committee, *See Goal 1, Issue II, Recommendation 2*)

IV. Issue: Co-mingling/combine duplicative services

Long Term Recommendations

1. On an ongoing basis encourage the two main service providers, Metro and Community Bridges, to implement contract agreements when necessary and when feasible to minimize the inefficiency of both providers providing rides to the same location. (* 8 to 2, with 1 abstention)

Recommendation: Metro and Community Bridges, ongoing

2. Lobby state and federal regulators to reduce barriers to sharing rides between different programs/funders.

Responsibility: RTC

3. Include co-mingling issues in future discussions about the Community Bridges.

Responsibility: RTC

V. Issue: Making the transit system and related infrastructure more accessible (e.g. sidewalks, coordination with planning/public works departments on land use, etc.)

Short Term Recommendations

1. Support development of the Pedestrian Access Report form by the Community Traffic Safety Coalition as a way to communicate pedestrian improvements to local jurisdictions and help them prioritize needed projects

Responsibility: Community Traffic Safety Coalition

2. Participate in the process to review local General Plans, Housing and Circulation Elements to ensure that the specialized transportation needs of seniors and people with disabilities are included
3. Responsibility: Social Service agencies and Representatives from Local jurisdictions on local boards

Long Term Recommendations

4. Recommend that local jurisdictions:
 - Pursue aggressive conditional use permits to force developers to provide transit accommodations;
 - Encourage, through zoning, construction of facilities for seniors and people with disabilities near services;
 - Require appropriate access facilities near congregate living locations (group, licensed);
 - Require developers to include pedestrian/infrastructure improvements in project plans/costs or divert costs to fill gaps in the network; and
 - Request that each local jurisdiction develop an annual target number of accessible improvements (e.g. specify a number of curb cuts per year)

Responsibility: Local Jurisdictions

VI. Issue: Increase ridership among those with functional abilities (e.g. Mobility Training)

Short Term Recommendations

1. Develop a "Buddy System" to mentor new transit riders

Responsibility: Metro and possibly the Volunteer Center

2. Train groups of people at one time including offering mobility training at residential facilities

Responsibility: Metro

3. Expand promotion of the Mobility Training Program including identifying potential partner programs (entities such as the Department of Motor Vehicles)

Responsibility: Metro, other service providers and potential partners

Long Term Recommendation:

4. Expand mobility training, if funding permits, including more promotion and an expanded focus on young people possibly working through school districts.

Responsibility: Metro, funding entities, school districts, San Andreas Regional Center

5. Lobby state and federal entities to provide funds for this program

Responsibility: RTC and Metro

6. Look into providing free bus passes for conditional riders of ADA Paratransit as a way to reduce paratransit use, cut costs and encourage long term transit use (*10 to 5)

Responsibility: Metro

7. Consider Deviated Fixed Routes, that can deviate slightly from fixed paths to address elderly and disabled transportation, as another way of providing additional service in parts of the county where it would be appropriate (* 7 to 3).

Responsibility: Metro

VII. Issue: Maintain fair funding allocations without disadvantaging one group over another

Short and Long Term Recommendation:

1. When making funding allocations be aware of the different special services provided and their potentially different costs

Responsibility: Funding entities

VIII. Issue: Encourage accessible multi-modal transportation choicesShort Term Recommendation:

1. Establish an annual day to encourage increased sensitivity for elected/appointed officials and relevant employees with events such as "Living the Paratransit Experience," Disability Awareness Day or transportation expositions.

Responsibility: Metro, Community Bridges in conjunction with community groups and agencies such as the Central Coast Center for Independent Living and the Stroke Center

Long Term Recommendation:

2. Explore establishing a centralized location for paratransit and specialized transportation information such as a Mobility Management Center, kiosk, or 511 transportation information service. These transportation information services could be integrated with information about social services.

Responsibility: Consolidated Transportation Services Agency or other social service agency and RTC (for 511)

IX. Issue: Encourage people with special transportation needs to live in areas with more urban servicesShort Term Recommendations (see also VII):

1. Emphasize that transportation choices are related to housing choices

Responsibility: Realtors, property managers, high density residential managers and local jurisdictions through zoning of use permits

2. Develop maps though out the county showing residential, education and commercial and recreation activities near residential areas, along major transit routes (within $\frac{3}{4}$ mile), etc.

Responsibility: Local Jurisdictions, Metro, residential developments

3. Better publicize existing information and resources, such as the Senior Network Services guidebook, for seniors and people with disabilities, including income eligibility issues.

Responsibility: RTC reference in the Guide to Specialized Transportation

Long Term Recommendations

4. Encourage higher densities in downtowns and urban areas with mixed use housing including provisions for seniors and people with disabilities.

Responsibility: Local Jurisdictions

5. Inclusionary housing should be maintained and "in lieu" developer fees should be discouraged as a way to encourage integrated, non isolated residential facilities for seniors and people with disabilities

Responsibility: Local Jurisdictions

X. Issue: Assess and integrate unmet specialized transportation needs

Short Term Recommendation:

1. Use statistical and economic information to help determine unmet needs.

Responsibility: RTC including service providers, funding agencies and the Area Agency on Aging

XI. Issue: Potential duplication between MediCal/Alliance and Medical Voucher rides, and Taxi Scrip and ADA Paratransit rides

Short Term Recommendation:

1. Work through the Elderly & Disabled Transportation Advisory Committee or other RTC committee (per Goal 1, Issue II, Recommendation 2) and appropriate bodies to develop recommendations for program changes as needed. Bring final recommendations to the RTC

Responsibility: Community Bridges, E/D TAC (or other RTC committee per Goal 1, Issue II, Recommendation 2), RTC and appropriate bodies

2. Require all Transportation Development Act fund recipients to take responsibility to ensure that ride and cost issues are resolved

Responsibility: RTC and TDA fund recipients (currently Metro, Community Bridges, Volunteer Center) with the E/D TAC as oversight

3. Promote Taxi Scrip, within funding limitations

Responsibility: Entity overseeing the Taxi Scrip program (currently Community Bridges)

XII. Issue: Some rides don't meet ADA criteria (outside geographic service area, wheelchair size, no service at days/times)

Short Term Recommendation:

1. Create an administrative mechanism to allow a passenger to ride on one vehicle for one trip. These rides may have various funding sources and negotiated special billing arrangements. (* 12 to 3)

Responsibility: all service providers

XIV. Service between counties

Short Term Recommendations:

1. Ensure coordination between ParaCruz and fixed-route bus service. Conduct public education efforts to encourage and train people to use these services to travel between Santa Cruz and the Bay Area (Highway 17 Express Bus and VTA's Outreach Program.) Include this information in the next printing of the RTC's *Guide to Specialized Transportation Services*.

Responsibility: Metro, RTC, Valley Transit Authority (VTA), Monterey-Salinas Transit, Metropolitan Transportation Commission

2. Continue support for the Red Cross inter-county medical transportation program.

Responsibility: RTC, Community Bridges

Long Term Recommendations:

3. Identify those parts of the state where paratransit services are not available to the public trying to move between areas where they are available

Responsibility: RTC

4. Encourage Bay Area agencies to coordinate their paratransit services between themselves including standardizing eligibility criteria and providing centralized information to the public.

Responsibility: MTC

5. Encourage AMBAG's Sr. Mobility Council to work on coordinating paratransit and bus services between San Benito, Monterey and Santa Cruz Counties

Responsibility: AMBAG, Metro, MST, San Benito COG

GOAL #2 – THE SYSTEM WILL STRIVE TO MAXIMIZE CUSTOMER SERVICE AND SATISFACTION

I. Ease of use for client

Short Term Recommendation:

1. Expand the prepaid account option to ParaCruz customers (other than the Stroke Center) and encourage other paratransit providers to offer similar arrangements

Responsibility: Metro and Other Paratransit Providers

Long Term Recommendation:

2. Consider the creation of a single agency which would, at a minimum, administer the allocation of paratransit services and/or potentially be the provider of an integrated system of paratransit services. (* 7 to 4)

Responsibility: RTC and Metro

II. Customer service (phone hold times, eligibility determination, etc.)

Short Term Recommendations:

1. Request that Metro consider the option of designating appropriate individuals at particular facilities to determine eligibility for ADA paratransit services using Metro's criteria/standards and operating under Metro's supervision. (* 7 to 5)

Responsibility: Metro

1. Require members of Metro's ParaCruz Appeal Panel to be persons with disabilities who are users of the system and who have knowledge of the ParaCruz eligibility criteria. (* 6 to 4)

Responsibility: Metro

III. Trip quality (timeliness, safety, clean vehicles, support equipment in vehicles e.g. more hand grips, etc.)

Short Term Recommendations (in response to all of the above):

1. Encourage all paratransit service providers to develop, and keep current, a "Riders Bill of Rights" (or equivalent document) that defines pick up windows, safety, cleanliness, etc... and how customers can make suggestions for improvements. (Example: existing Metro ParaCruz Customer Guide and Eligibility Criteria)

Responsibility: Metro, Community Bridges, Other Paratransit Providers

2. Provide a convenient, public forum once or twice a year for all paratransit agencies to receive input on their services from users. (* 7 to 2, 1 abstention)

Responsibility: Metro, Community Bridges, Other Paratransit Agencies

IV. Communication between drivers and riders for schedule changes

Short Term Recommendation:

1. Dispatchers should continue to call the rider if the pickup is going to be outside (earlier or later) the ready window.

Responsibility: Metro, Community Bridges, Other Paratransit Service Providers (These practices currently exist and are practiced.)

V. Affordability

Short Term Recommendation:

1. Programs for low income individuals should continue to receive priority funding for Paratransit services when no other options are available

Responsibility: Central Coast Alliance for Health, Community Bridges, Red Cross, RTC (or its committee, *See Goal 1, Issue II, Recommendation 2a*)

VI. Community input procedures

Short Term Recommendations:

1. Coordinate with Annual Unmet Needs meeting(s)

Responsibility: RTC (or its committee, *See Goal 1, Issue II, Recommendation 2a*)

2. Participate in RTP Update Process

Responsibility: RTC

3. Increase public awareness of Metro Advisory Committee (MAC)

Responsibility: Metro

4. Develop mechanisms to assure that policy making boards stay apprised of concerns the community has about paratransit services

Responsibility: Metro, Community Bridges, RTC

VII. Accountability and system responsiveness

Short Term Recommendations:

1. Provide a convenient, public forum for all paratransit agencies to receive input on their services from users. (* 7 to 2, 1 abstention)

Responsibility: Metro, Community Bridges, Other Paratransit Providers

VIII. Countywide availability of accessible vehicles (including taxi scrip and regular taxi service)

Short Term Recommendations:

1. Periodically review and evaluate the list of taxi scrip clients to ensure that registrants still want to be a part of the program and are still eligible

Responsibility: Community Bridges, RTC (or its committee, *See Goal 1, Issue II, Recommendation 2a*)

2. Consider expanding funding of the taxi scrip program

Responsibility: Community Bridges, RTC

Long Term Recommendations:

3. Lobby state representatives to support requirements for all taxi vehicles to be accessible in the future (within the constraints of vehicle size); and lobby local elected officials to, through the permitting process, require local taxi operators to have a certain percentage of taxi fleets fully accessible (* 6 to 4, 1 abstention)

Responsibility: RTC, Metro, Community Organizations representing the Elderly and Disabled communities

IX. Clear transportation system understanding/expectations and community outreach (riders, caseworkers, counselors, etc.)

Short Term Recommendation:

1. Develop a "cheat sheet" for use by service providers and related agencies to help direct riders to appropriate service providers. The sheet should include eligibility criteria and phone numbers and could be indexed to more complete information available in the RTC's "Guide for Specialized Transportation". This could be done in collaboration with the CTSA and other interested parties. References can be made to resource documents.

Responsibility: RTC (or its committee, *See Goal 1, Issue 2, Recommendation 2a*)

X. Emergency Ride programs for paratransit and transit riders

Short Term Recommendations:

1. Conduct outreach to paratransit users who work for TMA member employers to advise them that they may be eligible to use the TMA's emergency ride home (ERH) program. Encourage more employers to join the TMA in order to offer the ERH program.

Responsibility: Santa Cruz Area TMA, Pajaro Valley TMA, TMA Employers, Metro

2. Encourage expansion of emergency ride home programs beyond employers.

Responsibility: Metro, Community Bridges, Other Paratransit Providers, RTC

3. Request that all paratransit providers adopt policies to ensure that none of their clients are stranded on a trip without a ride home

Responsibility: Metro, Community Bridges, other Paratransit providers

4. Request that all paratransit providers consider adopting policies to allow same-day changes under criteria that they may adopt. (* 7 to 2)

Responsibility: Metro, Community Bridges, other paratransit providers

GOAL #3– LEGAL MANDATES SHALL BE OBSERVED

Short Term Recommendations:

1. All legal mandates and requirements -- such as the federal Americans with Disabilities Act, state Medi-Cal requirements and funding requirements from entities such as the Area Agency on Aging – shall be met.

Responsibility: Metro, Community Bridges, private operators, other paratransit providers

GOAL #4– INCREASE FUNDING FOR SPECIALIZED TRANSPORTATION SERVICES

Long Term Recommendations:

1. If another transportation sales tax measure is considered in the future, it should include funding specifically allocated for paratransit and specialized transportation for seniors and people with disabilities (* 11 to 2).

Responsibility: RTC and the community

2. Task force favors attempting to secure additional funding from federal, state and local sources for paratransit and specialized transportation services.

Responsibility: RTC and service providers

* All recommendations by consensus except those noted in parenthesis with vote counts

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Paratransit Coordination Task Force

Task Force Members:

Caroline Bliss-Isburg	Stroke Center/Elderday/Cabrillo College Disabled Student Services
Michael Bradshaw	Center for Independent Living
Scott Bugental	Elderly & Disabled Transp. Advisory Committee (E&D TAC)
Richard Camperud	Taxi Companies
Tony Campos (R)	Regional Transportation Commission (RTC)
Barbara Flynn, RN	Medi-Cal/Central Coast Alliance for Health
Mark Hartunian	Community Bridges
Kathleen Johnson (R)	Skilled Nursing & Residential Care Facilities
Clay Kempf	Seniors Council
Gary Knutson	Santa Cruz County Auditor/Controller
Steve Kudlak (M)	Consumer of Fixed Route Transit
Paul Marcelin-Sampson	Metro Riders Union
Roger McKowan (R)	Medical Community or Sr. Housing Developments
Eileen Pavlik	Service Employees Int'l Union, Local 415 (SEIU)
Dennis Papadopoulos (M)	Consumer of Paratransit Services
Emily Reilly (M)	Santa Cruz Metropolitan Transit District (SCMTD)
Carmen Robles	Santa Cruz County Health Services Agency (HSA)
Stuart Rosenstein (M)	Metro Advisory Committee (MAC)
Ernestina Saldana	Metro Accessible Services Transit Forum (MASTF)
Patricia Spence (M)	Santa Cruz Metropolitan Transit District (SCMTD)
Ellen Timberlake	Santa Cruz County Human Resources Agency (HRA)
Adam Tomaszewski (R)	Consumer of Paratransit Services
Mardi Wormhoudt (R)	Regional Transportation Commission (RTC), Chair
Arturo Zamudio	United Transportation Union, Local 23 (UTU)

Task Force Alternates:

Kirk Ance	Community Bridges
Manuel Coto	Stroke Center/Elderday/Cabrillo College Disabled Student Services
Michael Keogh (M)	Santa Cruz Metropolitan Transit District (SCMTD)
James Monroe	Taxi Companies
Bonnie Morr	United Transportation Union, Local 23 (UTU)
Edenilson Quintanilla (R)	Regional Transportation Commission (Campos)
Nicole Rosa	Medi-Cal/Central Coast Alliance for Health
Andy Schiffrin (R)	Regional Transportation Commission (Wormhoudt)
MaryJo Walker	Santa Cruz County Auditor-Controller

Task Force Staff:

Pat Dellin	Regional Transportation Commission
Karena Pushnik	Regional Transportation Commission
Tegan Speiser	Regional Transportation Commission
Les White	Santa Cruz Metropolitan Transit District
Bryant Baehr	Santa Cruz Metropolitan Transit District
Sam Storey	Community Bridges
Link Spooner	Community Bridges

Specialized Transportation System Goals and Issues

GOAL 1: The system will use funding as efficiently and effectively as possible.

Related Issues:

How to manage eligibility under various programs (clear criteria, centralized information and/or registration)

Advance scheduling (for rides more than 2 weeks away)

Available funding and resources

Coordination between paratransit services (ADA, TDA, other)

Co-mingling / combine duplicate services

Making the transit system and related infrastructure more accessible (e.g. sidewalks, coordination with planning/public works departments on land use, etc.)

Increase ridership among those with functional abilities (e.g. Mobility Training)

Maintain fair funding allocations without disadvantaging one group over another

Encourage accessible multi-modal transportation choices

GOAL 2: The system will strive to maximize customer service and satisfaction.

Related Issues:

Ease of use for client

Customer service (phone hold times, eligibility determination, etc.)

Trip quality (timeliness, safety, clean vehicles, support equipment in vehicles e.g. more hand grips etc.)

Communication between drivers and riders for schedule changes

Affordability

Community input procedures (riders, caregivers, and facilities)

Accountability and system responsiveness

Countywide availability of accessible vehicles (including taxi scrip)

Clear transportation system understanding/expectations and community outreach (riders, caseworkers, counselors, etc.)

GOAL 3: Legal mandates shall be observed

Related Issues:

Assurance that legal requirements met (ADA, Area Agency on Aging, Medi-Cal, TDA, CTSA, motor vehicle laws, etc.)

Labor relations

GOAL 4: Increase funding for specialized transportation services

Paratransit Coordination Task Force (PCTF)
MINUTES – MEETING # 9

Wednesday, February 16, 2005, 2:00 – 5:00 pm
Santa Cruz Civic Auditorium, ABC Room

Members Present:

Michael Bradshaw
Scott Bugental
Richard Camperud
Barbara Flynn
Kathleen Johnson
Clay Kempf
Paul Marcelin-Sampson
Roger McKowan
Dennis Papadopulo
Emily Reilly
Carmen Robles
Stuart Rosenstein
Pat Spence
Ellen Timberlake
Arturo Zamudio

Alternates Present (* = voting):

James Monroe
Edenilson Quintanilla *
Andy Schiffrin*

Staff Present:

Bryant Baehr, SCMTD
Mark Dorfman, SCMTD
Steve Paulson, SCMTD
Karena Pushnik, SCCRTC
Tegan Speiser, SCCRTC
Sam Storey, Community Bridges
Les White, SCMTD

Others/Guests Present:

Sharon Barbour, MASTF
Bob Yount, MASTF & E/D TAC

1. Introductions

Introductions were made.

2. Oral Communications

Bryant Baehr announced that the paratransit vehicles the Task Force requested to view would be arriving at 4:30 pm.

3. Additions or Deletions to the Agenda

Emily Reilly noted that she had a conflict and would be unable to stay for the entire meeting. She requested to address part of Item 8 first. Ms. Reilly thanked the Paratransit Coordination Task Force for their work to develop short and long term recommendations to enhance the specialized transportation network for seniors and people with disabilities while keeping in mind funding and legal restraints.

Related to Item #7- Final Recommendations, the following materials were distributed at the meeting:

- Draft List of Recommendations with corrections in references to goal/issue numbers (Revised Attachment 2)

- Draft Recommendations with Pat Spence's edits with her comments shown in bubbles (Revised Attachment 3)
- Letter from Task Force member Eileen Pavlik
- Main Points PCTF Recommendations from Pat Spence. She requested that they be attached to these minutes (Attachment 1) and be discussed first under Item 7 – Finalize Task Force Recommendations.

Consent Agenda

The consent agenda was approved with Marcelin-Sampson abstaining (Timberlake/Kempf).

4. Approved the Minutes of the January 19, 2005 Paratransit Coordination Task Force
5. Approved revisited Minutes of December 15, 2004
6. Accepted summary information on Other Consolidated Transportation Service Agencies in California

Regular Agenda

7. Finalize Task Force Recommendations

Karena Pushnik provided an overview of the status of the recommendations noting that they were developed over the course of many meetings and that the legal mandates and requirements served as the framework under which the recommendations were developed. Ms. Pushnik noted that, although generally included in other recommendations, the Task Force may want to develop specific recommendations for Goal #3 – Legal Mandates and Requirements or Goal #4 – Increase Funding for Specialized Transportation Services.

Per Pat Spence's request to address points in her memo titled "Main Points PCTF Recommendations," Chair Schiffirin took this item first. Following discussion of her concerns, the Paratransit Coordination Task Force (PCTF) agreed to the following by consensus:

- Agreed to include the following items as appendices to the Final Recommendations: A) Demographics and population projection information provided by Pat Spence, Paul Marcelin-Sampson and the Area Agency on Aging, and B) SCMTD's PowerPoint presentation on legal mandates C) Minutes from all PCTF minutes, D) Fact finding information about other paratransit systems developed by Paul Marcelin-Sampson, E) Information on existing specialized transportation services in Santa Cruz County and F) Information on other area's similar services/structure;
- Recommended that new Regional Transportation Commissioners receive specialized transportation information in their packet of orientation materials;
- Added a new recommendation "All legal mandates shall be followed;"

- Added a new recommendation “The Task Forces favors attempting to secure additional funding at the local, state and federal levels for paratransit and specialized transportation services”

The following recommendations of Ms. Spence were not approved:

- A motion was made to include items for which there were no recommendations because efforts are already underway -- such as Advance Scheduling where mechanisms are already in place to meet these needs and Customer Service Goals for Hold Times where the criteria is already included in Metro’s ParaCruz Guide. The motion (Spence/Marcelin-Sampson) failed on a vote of 2 – 10.

The following recommendation was approved by a vote:

- Added a new recommendation “If another sales tax measure is pursued, the Task Force recommends that funds be specifically allocated for paratransit and specialized transportation for seniors and people with disabilities” passed by a vote of 11-2 (Reilly/Johnson);

The Task Force proceeded to review the Draft Recommendations. There was consensus on all recommendations and amendments with the following exceptions:

- Modify Goal 1, Issue II, Recommendation 2: Redefine the RTC’s Elderly & Disabled Transportation Advisory Committee to empower it to play a stronger role in the oversight of paratransit services so that the Paratransit Coordination Task Force’s recommendations are taken seriously by both the RTC and Metro. (Timberlake/Kempf, passed by a vote of 9 – 3)
 - o Create a structure that works mutually, where staffs can work together, where interested parties can work together to deal with issues that may arise that concern both of these services, whether it’s the Elderly & Disabled Transportation Advisory Committee as it’s now formed or a revised E/D TAC or some other entity altogether.

Responsibility: RTC & Metro

- o Establish a structure that assures that efficiency and duplication issues are dealt with effectively so problems are solved. This structure needs to have the respect and credibility of both the RTC and Metro. This would provide continuity with the work that the Task Force has started.

Responsibility: RTC & Metro

- Modified Goal 1, Issue IV, Recommendation 1: Encourage the two main service providers, Metro and Community Bridges, to implement contractual agreements when necessary and when feasible to minimize the inefficiency of both providers providing rides to the same location. In addition, this recommendation was moved to long term. (Kempf/Bradshaw, passed by a vote of 8-2 with one abstention.

Responsibility: Metro and Community Bridges

- Add a new recommendation under Goal 1, Issue VI, Long Term Recommendations: Recommend that the Transit District consider deviated fixed route systems as another way of providing additional service in parts of the county where it would be appropriate. (Kempf/Bugental, passed by a vote of 7 – 3 with one abstention)

Responsibility: Metro

The Task Force then unanimously approved the Final Recommendations as amended to be presented to the Regional Transportation Commission at their April meeting (Johnson/Kempf), with two abstentions. The staff report will make it clear that although the Task Force may have unanimously supported forwarding the recommendations to the Regional Transportation Commission, it does not mean that every member agrees with every recommendation. The staff report will further explain how decisions were made by the Task Force and note items where there was no consensus and votes were taken. Instances where there were votes on the recommendations will be recorded.

The Task Force also approved the following appendices to be included with the recommendations (Bugental/Robles):

- Population and demographic information
- Copy of SCMTD's Legal Mandates presentation
- Minutes from all the PCTF meetings
- Background, purpose and needs (unmet needs)
- Existing Services in Santa Cruz County
- Facts about other services
- Fact finding information about other services

8. Appreciation of Task Force Members and Refreshments

Chair Schifffrin acknowledged and appreciated the work of Task Force members. Task Force members thanked RTC staff for their assistance in preparing and documenting the Task Force meetings. RTC staff thanked service provider staff for making resource information available for the task force.

Refreshments were served.

9. Adjourn

The meeting adjourned at 4:40 p.m.

Respectfully submitted by Karena Pushnik, Sr. Transportation Planner

Attachment 1: Pat Spence's Main Points PCTF Recommendations

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MAIN POINTS PCTF RECOMMENDATIONS

<p>There are 3 new Commissioners and 5 new alternates to the Commission since January 2005. There are quite a few meetings where there may be more alternates in attendance than main members. Any alternate must be prepared to sit in at the last minute and cast an informed vote.</p>	<p><u>Recommendation:</u> Include the following in the recommendations to RTC Commissioners:</p> <ul style="list-style-type: none"> • Background and Purpose included in the 2/16/05 PCTF packet. • Demographic and population projections for Santa Cruz County through 2050 made by Marcelin-Sampson/Spence and Bugental's Area on Aging statistics • Power Point presentation of the legal mandates given by SCMTD legal counsel, Peg Gallagher
<p>The following are from RTC staff email 2/14/05</p>	
<p>Two categories of items from previous versions of the recommendations were omitted in the February 16th packet version: 1) discussion points and 2) issues where there were no recommendations.</p> <p>Two examples of issues where there were no recommendations are: Advance Scheduling (formerly Goal 1, Item II in the matrix) where mechanisms are already in place to meet these needs and Customer Service Goals for Hold Times (formerly Goal 2, Item II in the matrix) where the criteria is already included in Metro's ParaCruz Guide.</p>	<p><u>Recommendation:</u> Put these two/and any and all deletions be back in the recommendations to RTC so Commissioners know there was discussions of important issues. In particular, that Metro Para Cruz policies have been in place for over two years. The Customer Guide is also the backbone of SCMTD's compliance under federal legal mandates under the ADA.</p>
<p>No recommendations were made at the September and October meetings when the Task Force discussed Goal 3 – Legal Mandates. Therefore, this goal does not appear on the final list of recommendations. It was assumed that the legal mandates and requirements were the framework under which the funding efficiency and customer service recommendations were developed. Unresolved issues that arose at the Legal Mandates discussions were put on a Pick Up List and those items were included in the matrix of issues covered in Goals 1 and 2.</p>	<p><u>Recommendation:</u> Include wording that legal mandates will be followed. This goal has been a part of the overall discussion since originally approved and voted on by the RTC Commissioners in February 2004. Following federal ADA legal mandates is not an arbitrary action and should not be "assumed that the legal mandates and requirements were the framework under which the funding efficiency and customer service recommendations." Any approved list of recommendation lacks credence, if PCTF members can not state unequivocally that compliance to any federal or state law is of utmost importance.</p>

<p>As noted in the staff report, no recommendations have been determined yet for Goal 4 – Increased Funding for Specialized Transportation Services. Therefore, it does not yet appear on the final list of recommendations. The Task Force could add recommendations for this goal at your meeting.</p>	<p><u>Recommendation:</u> Include this in the recommendations to RTC Commissioners. The omission of this goal is paramount to the any recommendation by the PCTF. Without additional funding there is no means to institute far-reaching recommendations.</p>
<p>Throughout the Preliminary Draft Recommendations and the 2/16/05 Draft there are at least 9 references to "RTC (or it's committee)" "RTC Advisory Committee" and "E & D TAC as it is formed now or a revised E & D TAC or some other entity altogether."</p>	<p><u>Recommendation:</u> If the ultimate intention and direction of certain Task Force members is the recommendation that the Santa Cruz County Regional Transportation to form a paratransit oversight committee, be openly forthright with fellow Task Force members rather than veil this intention and insert it through unknowingly through these recommendations.</p> <p>The SC Metropolitan Transit District has a multi- level over sight process:</p> <ul style="list-style-type: none">• The 3300+-eligible Para Cruz customers and processes included in the Para Cruz Customer Guide• Para Cruz Management staff.• SCMTD upper level management staff including legal counsel• ADA Regulations and resulting case law• Federal Transportation Administration• Metro Advisory Committee (MAC)• Metro Accessible Services Transit Forum (MASTF)

FINAL

Paratransit Coordination Task Force

MINUTES – MEETING # 8

Wednesday, January 19, 2005, 2:00 – 5:00 pm
Santa Cruz Civic Auditorium, ABC Room

Members Present:

Michael Bradshaw
Richard Camperud
Kathleen Johnson
Clay Kempf
Paul Marcelin-Sampson
Roger McKowan
Dennis Papadopulo
Carmen Robles
Stuart Rosenstein
Ernestina Saldana
Pat Spence
Arturo Zamudio

Alternates Present (* = voting):

James Monroe
Nicole Rosa*
Andy Schiffrin*

Staff Present:

Bryant Baehr, SCMTD
Karena Pushnik, SCCRTC
Tegan Speiser, SCCRTC
Link Spooner, Community Bridges

Others/Guests Present:

Sharon Barbour, MASTF

Due to lack of a quorum, Item #7, an informational update on ADA Paratransit Implementation was discussed prior to the meeting being called to order.

7. ADA Paratransit Implementation Update

a. Transition Update

Metro - Bryant Baehr distributed results of a survey of 12 transit agencies in our area and how they handle same-day paratransit ride changes ([Attachment 1.](#)) Three allow some same-day changes (Sacramento, Muni, and Eastern Contra Costa). LA Access (8-10 providers in the LA basin that pool resources to provide service) allows changes and designed their service this way from the outset. VTA in Santa Clara County allows same-day changes, but charges riders 4 times the base fare for this flexibility. The criteria used to determine an emergency is an issue discussed by both Metro and this Task Force (TF) including concerns raised about preferential vs. discriminatory treatment.

Metro staff is asking their board to decide what type of reports on ParaCruz operational statistics they want included in agenda packets. A recommendation will go to the Metro Board in February. In the near future, Metro plans to survey the top 20-30 ride generators (ParaCruz destinations) to better understand their needs. The demonstration program with the Stroke Center and prepaid rides is going well. Metro has had a request to provide similar service to Twin Lakes Church. In response to a question about expanding prepaid service to other agencies, Metro staff responded that at this point, there do not seem to be any overly burdensome issues with the program. Some agencies such as VTA require all trips to be prepaid and a rider must have a positive balance in their account before they can book a trip. (This is not being recommended here.) Metro is starting to group more trips and using larger Goshen vehicles for these services. As requested by a member of the TF, Metro will bring a Goshen vehicle to the next TF meeting. Metro currently receives 350-400 calls a day for ParaCruz services.

A question was raised as to whether any data has been collected to determine efficient and effective service in terms of consumer satisfaction. Metro staff said that due to resource constraints, this type of survey is not conducted now even for the fixed route system. Any research that is conducted in the future would need to include riders on both fixed and paratransit systems.

Community Bridges (CB) – Link Spooner reported that the ADA paratransit service is now completely transitioned. They still receive a few calls mostly from doctor's offices. CB provides magnets to these entities with the new phone numbers and plans to follow up with a collateral piece.

In response to a question about ongoing coordination with ParaCruz for emergency ride changes or out of service area rides that then go into the service area, both agencies noted that they continue to communicate via emails and phone calls, but that there are no regularly scheduled coordination meetings. Metro staff feels that the out of area issue was resolved with a Metro bus stop change and by using TDA funds to cover two riders going to the Stroke Center.

A quorum was achieved and Andy Schiffrin called the meeting to order at 2:35pm.

1. Introductions – Attendees introduced themselves

2. Oral Communications – Bryant Baehr reported that he could bring the Goshen vehicle towards the end of the next TF meeting after Stroke Center service is finished for the day.

Pat Spence said she discovered another medical trip provider in the county: Central Coast Ambulance Services. They provide basic life transport services as opposed to advanced life transport. She provided information to RTC staff and said a representative of the ambulance company was available to make a presentation about their services to interested parties.

3. Additions or Deletions to the Agenda – None

Consent Agenda

Re: Item #6, Information on Consolidated Transportation Agencies in California, Karena Pushnik circulated information from CalACT about CTSA designations throughout the state. Staff will put this information into a matrix and provide copies at the next meeting. *This item was removed from the consent agenda and continued to the next meeting.*

Re: Item #4, the December 15, 2004 Minutes, Paul Marcelin-Sampson had these changes:

- Page 4-3 Re: accommodating oversized wheelchairs, Metro staff said they have several oversized vans that can be used for these trips, not just one.
- Pages 4-4 and 8-14 Re: the recommendation about allowing a rider to stay on a single vehicle and have the trip billed to multiple sources, Mr. Marcelin-Sampson said that he voted against the recommendation because the motion didn't include any fiscal safeguards. Therefore, he doesn't think the words "in a financially prudent manner" as stated in the minutes were part of the motion that was passed. Staff will check this fact and report back at the next meeting.

(Bradshaw/Saldana) – The consent agenda was approved as amended with one abstention.

4. **Approved the Minutes** of the December 15, 2004 Paratransit Coordination Task Force as amended.
5. **Approved sending a letter to the RTC** requesting one additional meeting of the Paratransit Coordination Task Force to finalize the committee's recommendations.
6. **Continued this item to the next meeting:** Accept Information on Other Consolidated Transportation Service Agencies in California

Regular Agenda

7. **Discussed as an information item before the meeting was called to order - ADA** Paratransit Implementation Update
8. **Task Force Recommendations**
 - a. **Developed recommendations on remaining issues** re: Task Force Goal 1: Efficiency and Effectiveness and Goal 2: Customer Service and Satisfaction
 - b. **Continued to next meeting** - Develop preliminary recommendations on any issues not yet discussed
 - c. **Information item: Recommendations developed to date**

The Chair reminded the TF that it requested the RTC to approve one more meeting of this group. This final meeting in February will be spent finalizing recommendations. The Chair asked for the assistance of everyone present to use the remaining 2 ¼ hours of today's meeting to stay focused on getting through all the issues outlined for today.

Michael Bradshaw said that he wanted to encourage the elected officials appointed to the task force to attend the final meeting in February.

The Task Force continued the process of discussing and developing recommendations to address the final issue listed under Goal #1 and the issues listed under Goal #2. The Draft List of Preliminary Recommendations formulated so far will be distributed with the February 16, 2005 Task Force Agenda Packet. Specific issues discussed were:

- Service between counties
- Ease of use for clients
- Customer Service
- Trip quality (timeliness, safety, clean vehicles, etc...)
- Communication between drivers and riders for schedule changes
- Affordability
- Community input procedures
- Accountability and system responsiveness
- Countywide availability of accessible vehicles
- Clear transportation system understanding/expectations and community outreach

- Emergency Ride programs for paratransit and transit riders

Actions:

While there was generally consensus about the recommendations, a hand count vote was taken on six issues as noted in the actions recorded below:

- *As a long term goal, consider the creation of a single agency which would, at a minimum, administer the allocation of paratransit services and/or potentially be the provider of an integrated system of paratransit services. (Passed 7 to 4)*
- *Request Metro to consider the option of designating appropriate individuals at particular facilities to determine eligibility for ADA paratransit services using Metro's criteria and standards and operating under their supervision. (Passed 7 to 5)*
- *Members of Metro's ParaCruz Appeal Panel should be persons with disabilities who are users of the system and who have knowledge of the eligibility criteria. (Passed: 6 to 4)*
- *Provide a convenient, public forum for all paratransit agencies to get input on their services from users. (Passed: 7 to 2 vote with 1 abstention)*
- *Lobby state representatives to support requirements for all taxi vehicles to be accessible in the future (within the constraints of vehicle size); and lobby local elected officials to, through the permitting process, require local taxi operators to have a certain percentage of taxi fleets fully accessible (Passed: vote 6 to 4 with 1 abstention)*
- *Request all paratransit providers to consider adopting policies to allow same-day changes under criteria that they may adopt. (Passed: 7 to 2)*

9. No action was taken on this carryover item from December 2004 Meeting:

Example of Specialized Transportation Mobility Plan from Modoc County -
(<http://www.itsmn.org/ruralits2004/presentations/Couch.pdf>)

10. Confirmed next meeting and agenda topic:

If the Paratransit Coordination Task Force's request for an additional meeting is approved by the RTC at their February 3 meeting, the final meeting of the Task Force will be held on Wednesday, February 16, 2005 from 2:00 – 5:00p.m. in the ABC Room of the Civic Auditorium. The primary agenda topic will be to finalize all Task Force recommendations.

11. Adjourn – The meeting adjourned at 5:00 p.m.

Respectfully submitted by,

Tegan Speiser, Sr. Transportation Planner

final

Paratransit Coordination Task Force

MINUTES – MEETING # 7

Wednesday, December 15, 2004, 2:15 – 5:00 pm
Louden Nelson Community Center, Senior Dining Room

Members Present:

Caroline Bliss-Isburg
Michael Bradshaw
Richard Camperud
Kathleen Johnson
Clay Kempf
Paul Marcelin-Sampson
Eileen Pavlik
Dennis Papadopulo
Carmen Robles
Stuart Rosenstein
Ernestina Saldana
Ellen Timberlake
Adam Tomaszewski
Arturo Zamudio

Staff Present:

Bryant Baehr, SCMTD
Pat Dellin, SCCRTC
Mark Dorfman, SCMTD
Karena Pushnik, SCCRTC
Tegan Speiser, SCCRTC
Link Spooner, Community Bridges

Others/Guests Present:

Sharon Barbour, MASTF
Michael Molesky, E&DTAC & CCAH

Alternates Present (* = voting):

Kirk Ance *
Michael Keogh*
James Monroe
Andy Schiffrin*

Andy Schiffrin called the meeting to order and thanked attendees for their flexibility about the meeting location change necessary due to another function at the Civic Center.

1. **Introductions** – Attendees introduced themselves
2. **Oral Communications** – Sharon Barbour announced that she was reelected as chair of the Metro Accessible Services Transit Forum (MASTF) and that the group will be taking a recess until November 2005. MASTF could meet in the interim should there be a need.
3. **Additions or Deletions to the Agenda** – Tegan Speiser requested that attendees provide their current email addresses on the sign-in sheet.

Consent Agenda

Item # 5 was pulled by Paul Marcelin-Sampson to be discussed as Item # 7.1 if time permits.

(Robles/Flynn) – The consent agenda was unanimously approved without item # 5.

4. **Approved the Minutes** of the November 17, 2004 Paratransit Coordination Task Force.

5. **This item will be discussed at a future meeting:** Example of Specialized Transportation Mobility Plan from Modoc County (see materials at this web site: <http://www.itsmn.org/ruralits2004/presentations/Couch.pdf>)

Regular Agenda

6. ADA Paratransit Implementation Update

Bryant Baehr announced that things are going smoothly with ParaCruz. In the January/February 2005 time frame, staff will bring the Metro Board suggestions for operational parameters – such as on time performance, call waiting time, etc. – to be included in the monthly reports.

Katherine Johnson noted that she has been conducting discussions with people living in assisted living and skilled nursing facilities about their transportation needs. She will forward comments to the appropriate transportation service providers.

a. Same Day/Emergency Destination Changes in Service

Bryant discussed the direction from the November Task Force meeting to develop solutions for the issue of changing the ride destination. In the case of rides to/from the Dialysis Center, Bryant noted that they know of only one person who has needed to be transported to Dominican when their shunt closed and they couldn't proceed with dialysis. The situation was not a medical emergency. Link Spooner said that if the person was eligible for the Medical Voucher program, Lift Line could provide the ride.

Bryant also noted that it is infeasible to open up the ADA Paratransit program to provide same-day service, and that it seemed unnecessary to design a policy/procedure for just one person. Metro staff has talked internally about the issue with their legal staff. Discussion ensued about a situation such as the Task Force meeting where, due to a situation beyond the control of the rider, the location changed. At least one Task Force member was unable to attend the meeting due to this. Bryant asked for guidance from the Task Force on the matter.

Emily Reilly suggested that criteria be proposed for the Metro Board to consider that would be flexible to accommodate critical needs without opening up the program.

Jim Monroe volunteered that private taxi operators can provide on-demand rides for \$7.50 (from Dialysis to Dominican).

Additional comments on the subject included the following:

- Recommendation to perform a costs/equity analysis
- Caution against using trip purpose to define priority, as this is prohibited for ADA Paratransit rides
- Support for a customer service orientation and further analysis about how/whether these needs can be met
- Support for a perspective that is fiscally responsible, fair and satisfies legal requirements

- Frustration was expressed about the lack of solutions proposed by the Metro and the request for a new recommendation from the Task Force
- Recommendation to find out which service providers are able to offer solutions, what payment mechanisms are available to pay for the rides, who is willing to be cooperative and what would be the process
- Medi-Cal has flexibility and is committed to making sure customers medical trip needs are met
- Reference made to the 1992 Paratransit Implementation Plan policy to hold a public hearing if changes are made to Plan (ADA Paratransit Service)
- Same Day/Emergency Destination Change rides could be added to the Unmet Needs list

Actions:

- 1) Metro staff agreed to prepare a summary for the January Task Force meeting of what is being done for similar situations around the state, particularly for similar sized service operators. If possible, the matrix will include what local providers can offer; and,**
- 2) Copies of relevant pages from the 1992 Paratransit Implementation Plan will be provided with the January Task Force packet to consider revisions.**

Regarding the accommodation of large reclining wheelchairs on ParaCruz, Bryant Baehr noted that a person in a prone position (over 15 degrees) can not effectively be secured. For liability reasons, Metro has been advised not to carry these trips. Metro does have oversized vans that are available on a first come, first served basis for large wheelchairs including semi-reclining passengers (less than 15 degrees). As the minivans need to be replaced, Metro will consider vehicles that offer more flexibility. Other considerations include light weight wheelchairs that can not be secured without violating the warranty.

Kathleen Johnson asked whether people were being turned down if they did not have their identification card with them. Bryant answered that that is not the case.

Link Spooner reported that the ADA Paratransit calls to Community Bridges have diminished and that Lift Line operations are running smoothly.

7. Discuss Remainder of Task Force Goal 1: Funding Effectiveness and Efficiency, and Discuss Goal 2: Customer Service and Satisfaction

The Task Force continued the process of discussing and developing recommendations to address the second half of issues listed under Goal #1. The Draft List of Preliminary Recommendations formulated so far will be distributed with the January Task Force Agenda Packet. Specific issues discussed were:

- Entity/Role of the CTSA
- Co-mingling rides
- Coordination with land use (infrastructure, development, etc.)
- Encourage transit ridership
- Fair funding allocations

- Encourage multi-modal transportation
- Proximity of residences and urban services
- Process for determining unmet needs
- Duplication of services
- Specialized transportation needs outside the ADA criteria
- Service between counties

Generally there was consensus about both the short and long term recommendations. However, there were two issues on which the Task Force members were requested to vote. These are noted below in the actions recorded below.

Actions:

- ***RTC staff will research Consolidated Transportation Services Agency roles and duties around the state and provide a summary with the next packet.***
- ***The Task Force recommends that Metro look into free bus passes for ADA Paratransit conditionally eligible riders (Passed: 10 to 5 vote with hand count)***
- ***The Task Force recommends that Metro and other service providers develop administrative mechanisms to the billing challenges that allow clients to use one vehicle for one trip. (Passed: 12 to 3 vote with hand count)***

8. Confirm next meeting and agenda topics:

The next meeting was confirmed for Wednesday, January 19, 2005 from 2:00 – 5:00p.m. at the ABC Room of the Civic Auditorium. Agenda topics will be to continue discussion and developing recommendations for Goal 2: Customer Service and Satisfaction. It is anticipated that a meeting will be held on February 17, 2005 to finalize recommendations.

9. Adjourn – The meeting adjourned at 5:05 p.m.

Respectfully submitted by,

Karena Pushnik
Sr. Transportation Planner

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FINAL

Paratransit Coordination Task Force

MINUTES – MEETING # 6

Wednesday, November 17, 2004, 2:00 – 5:00 pm
Santa Cruz Civic Auditorium, ABC Room

Members Present:

Caroline Bliss-Isburg
Michael Bradshaw
Richard Camperud
Kathleen Johnson
Clay Kempf
Paul Marcelin-Sampson
Roger McKowan
Eileen Pavlik
Dennis Papadopulo
Carmen Robles
Stuart Rosenstein
Ernestina Saldana
Ellen Timberlake
Adam Tomaszewski
Arturo Zamudio

Staff Present:

Bryant Baehr, SCMTD
Mark Dorfman, SCMTD
Peg Gallagher, SCMTD
Karena Pushnik, SCCRTC
Tegan Speiser, SCCRTC
Link Spooner, Community Bridges
Sam Storey, Community Bridges

Others/Guests Present:

Genevieve Bookwalter, SC Sentinel
Pearl Mendes, Yellow Cab
Michael Molesky, E&DTAC & CCAH
Barbie Schaller, Seniors Commission

Alternates Present (* = voting):

Kirk Ance *
Michael Keogh*
James Monroe
Bonnie Morr
Andy Schiffrin*

1. **Introductions** – Attendees introduced themselves
2. **Oral Communications** - None
3. **Additions or Deletions to the Agenda** – Item 6, ADA Paratransit Implementation Update, was moved to be the first item on the Regular Agenda.

Consent Agenda

(Timberlake, Papadopulo) as amended below. Keogh and Saldana abstained.

4. **Approve the Minutes** of the October 20, 2004 Paratransit Coordination Task Force.

Amendments:

- Indicate Eileen Pavlik and Ernestina Saldana were present on the list of members present.
- Paul Marcelin-Sampson had three changes to the Demographics and Definitions presentation on page 4-6 of the minutes: 1) re: the sentence that “an annual growth

rate in the senior population of 2.5% is substantial," the point was to say that there are other more important influences on the cost of providing services rather than percentage of annual population growth; 2) replace the word "unmanageable" for "unbearable" in the sentence "...the pressures on ParaCruz won't be unbearable until 2030"; and, 3) he doesn't remember anyone making the comment that "In 1950, the senior population was 50% of the total population". However, he asserts that this information is incorrect for the County of Santa Cruz. He cited census information which reported it as 14.8%. (Andy Schiffrin said that he had made the statement about the City of Santa Cruz.)

Regular Agenda

6. ADA Paratransit Implementation Update - Bryant Baehr and Sam Storey (oral report)

Bryant Baehr spoke to items 6 a, b and c.

On November 1st, Metro's first day of operating ParaCruz, they provided 500 rides and received 700 phone calls. ParaCruz is now providing 285-350 rides and handling about 400 phone calls daily. Much has been learned since operation began. Continuing education is needed about the ready window and about it being a shared-ride service. ParaCruz staff is working on new outreach materials. On-time performance is improving everyday. Now in 3rd week of operation and doing well. Have been working on correcting issues as they arise.

- a. Cabrillo College Stroke Center rides – Re: prepayment of fares, Stroke Center now pays Metro in advance for rides. When their ParaCruz-qualified students take a ride, it's deducted from the Stroke Center account balance and no money is collected. Metro is doing this as a demonstration project. If it's successful, staff may take it to the Metro board to expand the program. Good communication has been developed with the Stroke Center staff who are letting the Metro know about issues so Metro can adjust and learn from these situations. The Stroke Center is, in fact, the District's largest ParaCruz customer in terms of a one-place pick up and one-place drop off.

Mr. Baehr acknowledged the assistance of Metro staff Mark Dorfman and Peg Gallagher who worked with Cabrillo to set up this pre-payment system.

- b. Prepaid coupons – These are still being offered. Metro has had a rush of people wanting to buy them which is good. The less currency that is exchanged, the better it is for both the customer and Metro.

There was a question about the status of the policy that only clients can buy coupons and not agencies. Metro staff reiterated that others can buy the coupons, but only if they are for a specific ParaCruz-eligible person. Coupons must to be linked to an individual user as it's a restricted service designed only for people eligible for the service. Metro has been able to work through situations where agencies handle client's money. A point was made that only eligible riders were able to call and schedule a ride which should assure Metro that, regardless of who pays for the ride, only an eligible rider could actually schedule a ride and use a coupon.

- c. Large wheelchair issues – If the wheelchair can't be secured in one of Metro's minivans, three Goshen vans are available for use on a first come, first served basis. Metro is identifying customers with oversized chairs and trying to accommodate them using the larger vehicles.

There was a question about the information that went out in recent brochures about the size restrictions of wheelchairs allowed on ParaCruz. In their upcoming January mailing, updated information will go out about accommodating larger chairs.

At this point in the transition, Metro's main ParaCruz concerns are:

- On-time performance. Metro is hampered by the same things as everyone: accidents, traffic, etc...
- Communicating with customers about their needs and how to schedule their trips
- Have a full staff of reservationists. Average wait time hit a high of 2 minutes on a Sunday. Phone system wasn't quite set up correctly. Now averaging from 45 seconds to one minute and 10 seconds in terms of hold times on phone calls.
- Overall doing well. Metro learning new things daily.

A question was asked about the availability of on-time performance statistics. Metro staff responded that they plan to bring this data to the Metro Board (and this Task Force) in December.

A question was asked about a specific person who took a ParaCruz ride for treatment at the Satellite Dialysis Center. Due to treatment complications, the rider needed to be transported to the hospital although it was not an emergency situation and did not require an ambulance. Since ParaCruz does not allow scheduling of same day rides, Metro could not accommodate this change under their current established policy. The rider was referred to LiftLine who said they try to accommodate riders with unanticipated changes such as this.

Link Spooner explained how LiftLine handled these situations when they operated ADA paratransit under contract to Metro. There were two types of rides: Demand Rides and Will Call rides. Demand rides were rides with a pick up location, a destination and a pick up return time. Dialysis set up rides on a demand basis since they know how long people will be on the machines and people get better service if they have a scheduled pick up.

On the rare occasion where a person had a complication, the trip was turned into a Will Call ride to transport the person to the hospital and a Will Call ride for them to return home. They did this since LiftLine's policy was to always provide a means to return if they have taken a person somewhere. This return ride was not always needed since many times a family member provided the ride home from the hospital.

With the new system, it's possible that the person could receive a ride with a medical voucher on LiftLine if they were eligible. However, LiftLine would want to share responsibility for the return ride with Metro since the person took the initial ride on ADA. This round trip now has three legs instead of only two.

Key points in the lengthy discussion that ensued:

- Could medical vouchers be used in such a situation?
- Could ParaCruz provide same day service? Is there a rationale for the current policy which prevents it?
- Metro staff responded that it's a matter of the resource and cost implications, along with the fact that it's not Metro's current adopted policy and it's not required by the ADA.
- Since the ride was scheduled in advance and only the destination was changed, is this really a same day ride? Could the Metro board look at a change in policy (or more flexibility) to allow for a change in destination in emergency situations?
- The ParaCruz system is complementary to the fixed route bus. This may require a different system. Public transit is not set up to handle unforeseen circumstances.
- The number of rides that fall into this category are actually quite few.
- Not asking for policy change at this point. Want more analysis about options, extent of the problem, how many rides like this are taken each month, what are the cost implications etc...
- Could Metro be more flexible within the existing system, possibly incorporating someone with same day ride changes into an existing ride like LiftLine does?
- Several members expressed an interest in seeing Metro look into and prepare a report about the problem of meeting unanticipated same day service needs and identify options for resolution (possibly within the existing system.) Want to see a shift in approach aimed at solving a problem rather than let "policy" be a reason not to attempt to work it out.
- Metro staff said they are talking with lots of people and learning something new everyday. Met with 18 different groups in advance of the transition. Happy to come back at next meeting with more information on this issue of same day changes.

A motion was made (Kempf/Timberlake) to request that Metro review their policy regarding necessary same day destination changes to previously scheduled paratransit service, for example, dialysis.

Ms. Timberlake proposed a friendly amendment to the motion. Not just to review the Metro policy, but also to analyze potential criteria or scheduling change solutions that could address emergency, same day change needs and report back at the next meeting. Staff could propose criteria that would be sufficient to broaden the net.

The Chair clarified the intent of the motion: To have Metro staff return at the next meeting with a report about same day rides that differentiates different kinds of same day service, some handled one way and some another way, depending on the particular situation that

people find themselves in. The intent is to find some balance between the policy that works generally and the particular problems that clients have that can be serious. The Task Force is asking for a report about the issue, and options for what can be done about it, including the pros and cons of different ideas.

Congratulations were expressed to Metro for better customer service since taking over ParaCruz. More kudos were offered in terms of Metro's responsiveness to some of the concerns raised by the Task Force in terms of Stroke Center payments and accommodating large wheelchairs. This issue of same day ride changes is similar.

The Chair also complimented Metro with how they had responded to the Stoke Center's situation. He added that Metro had recognized that there was a real problem and that there were ways to solve it that didn't undermine the integrity of the system.

Due to staffing constraints, Mr. Baehr asked permission to break the request being made of him into two reports: 1) What happens at Satellite Dialysis and with emergency issues and 2) What happens in less than emergency situations. He can bring the first report addressing the emergency same day ride issue to the December meeting.

The motion passed with 10 voting for the motion and 3 voting against.

Mike Molesky said this issue, Scheduling Emergency Trips, was addressed 13 years ago in the paratransit design and agreement between SCMTD and the CTSA outlined in the Paratransit Implementation Plan. He was asked to make this information available to the task force.

Sam Storey spoke to item 6d.

- d. Numbers of people and contractual options for providing rides to people outside the ADA ParaCruz service area – 6 individuals were identified as out of the service area at the time of the transition. This includes both people who had been living outside of the area for some time and people newly out of the area due to recent bus service cuts. LiftLine is accommodating 4 of these people through existing programs so that their transportation is not disrupted. A pre-existing arrangement with Yellow Cab to provide service to the remaining two people was communicated to Metro.

Mr. Baehr indicated that due to district bus stops being moved, one if not both, of the remaining people are no longer outside of the service area and now qualify for ParaCruz.

5. Review and Discuss Task Force Goal 1: Funding Effectiveness and Efficiency

- a. Issues Identified from Initial Survey and during Previous Task Force Meetings

As requested by the Task Force, Karena Pushnik reported that staff had compiled an integrated matrix of the goals and issues identified through stakeholder surveys and items discussed at task force meetings thus far. The matrix includes key discussion points and space for short and long term recommendations.

The Chair suggested the following process for working on this item. Beginning with Goal #1, the task force will review each issue to see if there are recommendations and/or consensus on recommendations. Two lists will be created – one with approved recommendations and one with recommendations proposed, but not approved that could be revisited at a later date.

A question was raised about whether or not all of the issues needed to relate back to the larger goal. The Chair explained that the goals were an organizing tool for the issues and that recommendations don't necessarily need to tie back to goals. The objective is to come up with recommendations to address the issues.

The Task Force began the process of discussing and developing recommendations to address issues listed under Goal #1. Recommendations formulated so far will be distributed with the December Task Force Agenda Packet.

b. **Pick Up** List – Two items were referred to the pick-up list:

- Emergency same-day changes (such as destination) for ParaCruz rides
- Coordination and information and referral to other Transportation/Paratransit Services

7. **Confirm Next Meeting** – The next meeting was confirmed for Wednesday, December 15, 2004 from 2:00 – 5:00p.m. at the ABC Room of the Civic Auditorium. Agenda topics will be to continue discussion and developing recommendations for Goal 1: Funding Effectiveness and Efficiency and Goal 2: Customer Service and Satisfaction

8. **Adjourn** – The meeting adjourned at 4:55pm.

Respectfully submitted by,

Tegan Speiser
Sr. Transportation Planner

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Paratransit Coordination Task Force
Minutes - Meeting #5
Wednesday, October 20, 2004, 2:00 – 5:00 pm
Santa Cruz Civic Auditorium, ABC Room

Final

Members Present:

Scott Bugental
Richard Camperud
Clay Kempf
Steve Kudlak
Paul Marcelin-Sampson
Dennis Papadopulo
Eileen Pavlik
Emily Reilly
Ernestina Saldana
Pat Spence
Ellen Timberlake
Adam Tomazewski
Stuart Rosenstein

Staff Present:

Bryant Baehr, SCMTD
Mark Dorfman, SCMTD
Peg Gallagher, SCMTD
Les White, SCMTD
Karena Pushnik, SCCRTC
Tegan Speiser, SCCRTC
Link Spooner, Community Bridges
Sam Storey, Community Bridges

Others/Guests Present:

Path Star, Stroke Center

Alternates Present (* = voting):

Kirk Ance *
James Monroe
Bonnie Morr*
Andy Schiff*
MaryJo Walker*

1. Introductions

Attendees introduced themselves.

2. Oral Communications

Karena Pushnik announced that the Guide for Specialized Transportation is very popular and the Regional Transportation Commission (RTC) will be reprinting more in the near future. In addition, Spanish language and large print versions will also be developed. A sign-up sheet was distributed for the Spanish and large print versions to assist with determining printing quantities.

Paul Marcelin-Sampson urged members of the Task Force to support Measure J and to write letters to the editors of local papers.

Dennis Papadopulo thanked Santa Cruz Metropolitan Transit District (Metro) and Community Bridges staff for providing a presentation to Pleasant Care residents and staff about the ParaCruz transition.

3. Additions or Deletions to the Agenda

There were none.

CONSENT AGENDA

(Reilly/Timberlake with Items 4 and 5f pulled for discussion)

4. Minutes of the September 15, 2004 Paratransit Coordination Task Force

(This item was pulled for discussion, see first item on the regular agenda)

5. Accepted Information Items

- a. 9/24/04 memo from Margaret Gallagher Metro Counsel regarding clarification of issues raised at the September Task Force presentation
- b. 9/27 letter from Metro regarding appointed positions to Task Force
- c. Letters of appreciation for Norm Hagen, Jr. and Kanoa Dynek former Metro Advisory Committee and Consumer of Fixed Route Transit representatives, respectively
- d. ParaCruz Update from October 22 Metro packet
- e. 8/25/04 Correspondence from Human Care Alliance and 9/10/04 response from County
- f. Correspondence from Anne Zhang

(This item was referenced in the discussion for item #7, the ADA Paratransit Transition Update)

REGULAR AGENDA

4. Minutes from the 9/15/04 Paratransit Coordination Task Force meeting

This item was pulled from the consent agenda and approved (Reilly/Timberlake with Flynn, Quintinella and Schiffrin abstaining) with the following amendments:

- Norm Hagen was removed the list of attendees (p.4-1),
- The following sentence regarding eligibility staff was changed from “Discussing the item in the absence of the person currently filling the position (who also sits on the task force) made one person uncomfortable” to “One person thought discussing this item in the absence of the person currently filling the position (who also sits on the task force) was inappropriate” (p.4-7)
- Clarification was provided that recertification figures quoted were from September 2003. (p.4-7)
- Clarification was provided about the recertification numbers to indicate that many of the people previously on the roles were duplicates, have moved or are deceased (p.4-8). Handouts were distributed as additional information.
- The discussion about agency rides was changed to read “Agency trips are when an organization calls Metro and says they want to have a certain number of guaranteed trips for

a negotiated price. Booking these rides is outside the ADA paratransit situation and there's no regulation or limitation on what the paratransit agency can charge." (pp. 12-13)

6. Mandates and Program Requirements (*Continued from August 18 Meeting*)

a. Community Bridges

Using a PowerPoint presentation, Link Spooner provided an overview of the legal requirements and specific transportation program information. Included was background on the Consolidated Transportation Services Agency (CTSA) designation and eligibility information for their primary rides: Elderday Adult Day Care Center, Medi-Cal/Central Coast Alliance for Health, Transportation Development Act rides (Taxi Scrip, Medical Vouchers, Out-of-County Medical Rides/Red Cross and part of Stroke Center ride costs), and Meals on Wheels/Senior Meal Site Centers. Transportation Development Act funds are used not only to provide rides, but also for administration to support the transportation programs. Link highlighted the phone transfer system that will be installed to forward calls back and forth between Community Bridges and Metro.

Michael Bradshaw asked how the CTSA is designated. Karena Pushnik noted that the CTSA statutes were included in the packet which outline how the CTSA is designated, their responsibilities and duties.

Many people wanted to know more about how the Taxi Scrip program works, how many people are on the waiting list, the process to add new people to the waiting list, whether there was a process to regularly reevaluate whether people receiving scrip really need it, whether there was regular clerical review of the eligibility list and whether there were plans to prioritize disbursement of scrip based on prioritizing needs. Link noted that there are about 40 people currently on the waiting list and that the program serves the need for same day or on-demand rides, rides outside the ADA Paratransit service area and rides earlier/later than the ADA Paratransit service hour window. There is no expiration date on the Taxi Scrip, making it difficult to budget for this program. It was clarified that people will continue to call Community Bridges for Taxi Scrip. Community Bridges plans to discuss changes to the program with the Elderly & Disabled Transportation Advisory Committee and will bring their recommendations back to the Paratransit Coordination Task Force. Issues such as higher priority for out of the ADA Paratransit Service area and lower priority for individuals eligible for other transportation programs was discussed.

Questions ensued about differences between the Medi-Cal and Medical Voucher programs and whether there were waiting lists for the programs. Barbara Flynn answered that the Medi-Cal program has no waiting list. The program requires advance authorization which takes Community Bridges about 4 days, but can accommodate immediate need rides if necessary if the person contacts them directly. There are no limits to the number of rides that can be provided for Medi-Cal eligible rides. The Medical Voucher program has no waiting list, requires that a recipient be within 200% of the federal poverty level and was developed before there was an

arrangement with Medi-Cal to provide rides. Applications for this program are received at a rate of about one per week. Medical Vouchers have expiration date and last about three months. This program is limited by the amount of Transportation Development Act (TDA) funds available. It was agreed that the Medical Voucher program also warranted reevaluation and that this transition period was an opportunity to reexamine the cost effectiveness of the program.

Clay Kempf reminded the Task Force that the MSSP Taxi Scrip program also sends out taxi scrip to clients working through the County Health Services Agency case workers who are Medi-Cal eligible and at risk for institutionalization.

Proposed changes to the programs will be coordinated with the Paratransit Coordination Task Force recommendations, as the Task Force is charged with looking at the “big picture” and long term solutions. A goal is to get people on the “right ride” to avoid duplication and make the best use of precious resources. The transition of the ADA Paratransit program is seen as an opportunity to make changes in the programs.

Andy Schiffrin noted that the RTC currently does not really evaluate the Transportation Development Act claims and related information for any of the claimants including Community Bridges and Metro, but may request more information in the future.

b. Others and Related information

Paul Marcelin-Sampson called attention to the MedCAP article (pp. 6-16 to 6-19) noting that there were many good legal references in the article. He highlighted language from the article that Medi-Cal pays transportation costs when a client is physically unable to ride in cars, buses or taxis and said that Medi-Cal is required to be the provider of last resort.

Paul also reviewed the list of areas where Metro exceeds the legal requirements for transit and ADA paratransit. He suggested that the Task Force might want to identify priorities of additional services that could be provided should funding be available.

7. ADA Paratransit Implementation Update (*Continued from August 18 meeting*)

Bryant Baehr announced that the following was underway for ADA Paratransit or ParaCruz: Metro is fully gearing up for the November start date, the facility will be ready including computer and phone systems, vehicles will be transferred next Friday, staff is hired and will complete training on November 1, fueling and maintenance procedures are developed, clients have been contacted 3 to 4 times, and new identification cards and lanyards with the program name/phone number are currently being distributed.

Sam Storey noted that Community Bridges is in the process of transitioning staff out of the facility, is retaining eleven drivers and has hired an experienced scheduling manager.

Community Bridges staff has been instructed to communicate transition information with everyone who calls.

Stroke Center representatives asked whether the Transit District would be enforcing the requirement that the rider have the cash fare ready before the trip. Metro staff indicated that a meeting with the Stroke Center was arranged, but had to be cancelled due to schedule conflicts. The Metro allows prepaid coupons that can be purchased by eligible ParaCruz clients. Several people felt that Stroke Center students, due to their cognitive abilities and “newly disabled” status should have flexibility to have the Stroke Center help with payment when they arrive, rather than pay before they take the trip. If there was a need to change the policy, the Metro Board would need to take action. Peg Gallagher noted that the item could be included in the ParaCruz transition item already on the October 22, 2004 agenda.

Emily wondered whether a custom contractual agreement could be drawn up with the Stroke Center. Les White said that there could be an arrangement where the Stroke Center sends a list of their clients who use ParaCruz, Metro mails the tickets directly to the clients and the Metro invoices the Stroke Center for those rides. The Metro will have a meeting with the Stroke Center in the near future. It was clarified that the Stroke Center is considered an educational facility, rather than a medical facility, thereby making it ineligible for ride Medi-Cal reimbursement. Ernestina Saldana questioned whether a special arrangement with the Stroke Center would set a precedent that would also apply to other destinations (such as Dominican Rehabilitation Center which also serves stroke patients or Elderday). Emily requested that the item be on the October Metro agenda. Peggy Gallagher requested a letter from the Stroke Center for the Board packet with more information about the issue.

There was interest in the “pre-paid” coupons. Bryant said that currently they can only be purchased and used by eligible ParaCruz clients. The coupons are not negotiable or transferable, but are not printed with client names. Clients can purchase coupons in person or by mail. Currently has not been a big demand to facilitate people buying tickets for those unable to buy their own tickets (e.g. legal guardians, as presents, etc.). Only individual tickets are currently available, but Metro hopes to make books of tickets available in the future. Andy Schiffirin noted that, because Metro is responsible for controlling all the rides, there would seem to be no down side to selling tickets to a wider range of entities which would ensure more revenue and would increase efficiency. It may make sense to reconsider this aspect of the program.

People expressed hope that, as members of a compassionate community, solutions could be found.

The chair went through the Metro and Community Bridges’ responses to the Task Force transition suggestions. It was clarified that: Metro has bilingual reservation staff, Karena Pushnik will contact Anne Zhang (Letter requesting ADA Paratransit service for oversized wheelchairs, Item #5, pp. 5-13) to let her know that Metro staff will contact her and see if they have vans that could accommodate her, Title 24 will be investigated, training also provided for

Yellow Cab and the new private taxi operator, all drivers are First Aid/CPR trained, Metro will now begin to request emergency contact information for clients, Community Bridges and Metro will now track people living outside the service area, Metro can provide data about the number of people newly outside the service area due to route changes, Metro and other entities can pursue a Specialized Transportation forum or feature on Community TV's senior programs, another entity such as the Elderly & Disabled Transportation Advisory Committee can pursue an all-purpose phone guide for residential care facilities (condensed version of the Guide for Specialized Transportation), Metro will disseminate refrigerator magnets with ParaCruz and Lift Line phone numbers, Metro hopes to have solution ideas for service provider contractual arrangements for people living outside the service area, and people can call Community Bridges now for rides provided after November 1.

The list, started at previous Task Force meetings, of unresolved issues and rides not apparently covered by existing specialized transportation services was continued this meeting ([Attachment 1](#)).

Emily Reilly, Scott Bugental and Paul Marcelin Sampson thanked Metro and Community Bridges for all their great work on the transition, the incorporation of Task Force suggestions and comprehensive outreach efforts.

The next meeting will feature an update on the Stroke Center rides, prepaid coupons, large wheelchair issues, and numbers of people and contractual options for providing rides to people outside the ADA ParaCruz service area.

8. Demographics and Definitions (*Continued from August 18 meeting*)

Paul Marcelin-Sampson and Pat Spence presented demographic information from the Census and Department of Finances outlining past trends, current ParaCruz use and future projections to develop future ridership projections for ParaCruz. Steve Paulson, Metro staff, was acknowledged as inspiration. Paul asked Task Force members to focus on the senior population as a percentage of the whole population. Pat Spence suggested that if Measure J passes, the senior/disabled transportation funds may not be needed until the later years of the 30-year sales tax measure. Paul Marcelin-Sampson projects that the pressures on ParaCruz won't be unmanageable until 2030.

Task Force members noted that: the actual numbers are more important than the percentages, since funds are needed on a number of rides/cost per ride basis, advance planning will be necessary to have systems in place to meet the needs, trend have been proven wrong (one member noted that in 1950, the senior population of the City of Santa Cruz was believed to be 50% of the total population, as compared with the current rate of 10%) and that an annual growth rate in the senior population of 2.5% is substantial.

9. Review Task Force Goals and Work Plan

Andy Schiffrin noted that the Task Force developed a set of Goals/Objectives and a Work Plan early in the process and that, given the major changes in the provision of ADA Paratransit service and the time taken to address transition issues, it might be a good idea time for reevaluate of the Work Plan. He asked the group to consider the following questions:

- Where do we go from here?
- What can be done to focus on long term solutions?
- How should the task force proceed?
- What recommendations can be developed for the short term by the task force?

He proposed that the next two meetings focus on the remaining goals of funding effectiveness/efficiency and customer service/satisfaction. Task Force members asked that previously identified issues be included to build on earlier discussions and avoid “covering ground that was already covered.” Staff reports for the next two meetings will reference prior discussions and the group will work on identifying short and long term recommendations. The Task Force can decide whether it is necessary to schedule meetings beyond December 2004 at the November meeting.

10. Confirm Next Meeting:

The next meeting was confirmed for November 17, 2004 from 2:00 – 5:00p.m at the ABC Room of the Civic Auditorium.

11. Adjourn

The meeting adjourned at 5:00pm.

Respectfully submitted by,

Karena Pushnik

Sr. Transportation Planner

Attachment 1: “Pick Up” List of issues and uncovered ride types

**Paratransit Coordination Task Force
Minutes - Meeting #4**

Wednesday, September 15, 2004, 2:00 – 5:00 pm
Santa Cruz Civic Auditorium, ABC Room

Final

Members Present:

Caroline Bliss-Isberg
Scott Bugental
Richard Camperud
Clay Kempf
Steve Kudlak
Paul Marcelin-Sampson
Roger McKowan
Dennis Papadopulo
Emily Reilly
Pat Spence
Ellen Timberlake
Adam Tomazewski
Mardi Wormhoudt (Chair)
Stuart Rosenstein

Staff Present:

Bryant Baehr, SCMTD
Mark Dorfman, SCMTD
Isaac Holly, SCMTD
Peg Gallagher, SCMTD
Les White, SCMTD
Pat Dellin, SCCRTC
Karena Pushnik, SCCRTC
Tegan Speiser, SCCRTC
Link Spooner, Community Bridges
Sam Storey, Community Bridges

Others/Guests Present:

Bob Yount
Ron Dean

Alternates Present (* = voting):

Kirk Ance *
James Monroe
Bonnie Morr*
MaryJo Walker*

1. Introductions

Attendees introduced themselves. By a show of hands, it was confirmed that a quorum was present.

2. Oral Communications

Emily Reilly spoke at the last meeting about wanting the Task Force to build trust and keep moving forward. She reiterated that she wants to earn the trust of this group and, as the Metro Board representative, intends to do what she can to be responsive and put people at ease about things that concern them.

Clay Kemp appreciated Emily's comments, but noted that the concerns and frustrations that lead to people calling for the formation of this task force happened long before Metro decided to move paratransit in-house. He said that the goal for the task force is to improve paratransit for the community at large.

Karena Pushnik said that large print versions of materials for agenda item 5b are available and requested a count of the number of people who prefer large print materials (2-3 large print copies are needed.)

Ms. Pushnik also referred to the Existing Paratransit Services matrix distributed previously to the Task Force. Grace Blakeslee, of the RTC staff, will help update the table with new data for fiscal year 2003-04.

3. Additions or Deletions to the Agenda

Paul Marcelin-Sampson requested that Items 5b2 and 5b3 be handled as part of the legal mandates discussion, not part of the presentation on demographics. The Chair agreed to move these items under agenda Item 6. This material is not part of Metro's presentation, but deals with MediCal and paratransit mandates.

CONSENT AGENDA

The Consent Agenda was approved as amended (Timberlake/Bugental, motion carried with 2 no votes)

- 4. Approve the Minutes of the August 18, 2004 Paratransit Coordination Task Force including list of suggestions for the transition of ADA Paratransit service with the following amendments to page 4-7:**
 - Add the word "guaranteed" to the first bullet about rides home.
 - Add a bullet to use Public Service Announcements (PSAs) on radio and TV as another form of outreach to inform people about changes in paratransit services.
- 5. Accept Information Items**
 - a. Resignation from Norm Hagen, Jr. as the Metro Advisory Committee representative**

By consensus, a letter of appreciation will be signed by the Chair recognizing Norm Hagen for his service to the Paratransit Coordination Task Force
 - b. Demographics and Definitions items submitted by Pat Spence and Paul Marcelin-Sampson** – Item was pulled from the consent agenda and moved to the end of the regular agenda as Item 8.1 as requested by Pat Spence. If there is not time to address this item at this meeting, the item will be carried over to the next meeting.
 - i. Paratransit Demographics**
 - ii. Metro Exceeds Legal Requirements** (moved to Item 6)
 - iii. MedCAP Issue Brief** (moved to Item 6)
 - iv. 9/15/04 Memo on Definitions and Demographic Information**

REGULAR AGENDA

- 6. Mandates and Program Requirements (*Continued from August 18 Meeting*)**
 - a. Santa Cruz Metropolitan Transit District (Metro)**

Presentation by Peg Gallagher, District Counsel for Metro
"Legal Requirements for Metro ParaCruz"
The following includes text from the slides and charts used by Ms. Gallagher in her presentation (in bold type) and a summary of the discussion on each slide.

Ms. Gallagher said that most of the time, lawyers won't comment on how they feel about a law. However, she has found that the ADA is a law that brings out the best in people, makes them step out of themselves and perceive things from another person's perspective. Ms. Gallagher asked for questions during the presentation since a wide range of topics will be addressed.

Slide 1

Legal Requirements for Metro ParaCruz

The American's with Disabilities Act of 1990 (ADA) is a comprehensive framework and approach to end discrimination against persons with disabilities. ADA Goals: equality of opportunity, a chance to fully participate in society, for people to live independently and for individuals to be economically self-sufficient.

The ADA also covers employment, public entities, public accommodations and telecommunications. Legislators believed that accessible transportation would make all the other aspects of the ADA possible such as working, living independently, shopping and doing the things other people are able to do.

Slide 2

ADA Title II

A public entity fixed route operator must provide complementary, comparable paratransit service to individuals who because of their disabilities cannot use the fixed route service unless it would be an undue hardship. 42 USCA § 12143 (a)

This is civil rights legislation and is in the nature of an entitlement. Fixed route transit operators are required to provide people with disabilities who meet the eligibility requirements with this service.

An undue hardship waiver is a petition to the federal government for relief, usually due to finances. Metro has never applied for an undue hardship waiver. A number of transit districts throughout the country have requested relief, but none have been granted.

Slide 3

Fixed Route Operator

METRO is a Fixed Route Operator who's fully accessible bus fleet carries approximately 6 million rides annually, 700,000 rides are provided to people with disabilities or seniors. 49 CFR § 37.121

Legislators envisioned most people using fixed route service and that paratransit would be the exception rather than the rule.

Paratransit is about 103,000 rides out of 6 million rides annually on Metro. Metro pays for paratransit from its general transportation fund (fares, sales tax and federal funds.) As civil rights legislation, the ADA provides no funding for implementation. About 10% of the Metro's budget goes to paratransit.

Slide 4

Complementary Service

Paratransit Service is not a substitute, but a complement or “safety net” for those who are unable to use the fixed route system because of their disabilities. *49 CFR § 37.121*

Slide 5

“Comparable” Service

Paratransit Service must meet the minimum criteria set forth in the federal regulations to be “comparable”. *49 CFR § 37.121*

Slide 6

Can Provide More and/or Greater Service

Nothing in Federal Law prevents METRO from providing more or greater paratransit service or service to more individuals than the ADA requires. *42 USCA § 12143(f)(1)-(3)*

If you go beyond what’s required by the ADA, you cannot use this extra service as an excuse or justification to receive an undue hardship waiver.

Slide 7

Eligibility Requirements

All persons unable to use the fixed route service because of a disability and their companions are eligible for paratransit service. *42 USCA § 12143(c) 49 CFR § 37.123*

Additional Chart Presented at Meeting

ParaCruz Eligibility Criteria - *42 U.S.C. § 12143(c)*

Eligibility requirements are divided into three general categories:

Category 1 – A person, who because of their disabilities (mental or physical impairment,) is unable to board, ride, disembark or navigate accessible vehicles independently.

This is the primary category. This would be if because of your disability you couldn’t board a bus independently even though the bus is accessible. (They do not count the driver’s assistance.) For example, if you have Alzheimer’s and you were not able to cognitively board the bus and pay the money, then you would meet category 1.

Category 2 – An individual needs an accessible vehicle, and none is available.

All Metro buses are accessible with either lifts or ramps.

There are two other categories under category 2. If you’re on a bus, but the stop where you are to be deployed is not accessible, then you would be eligible to use paratransit.

If a vehicle is accessible to other wheelchairs, but not to your “common wheelchair,” which has a specific definition, then you could use paratransit.

Category 3 – If as a result of your disabilities, you are prevented from traveling to a boarding or coming back to a disembark location.

Basically, if you can use fixed route service, you should. If you can’t use it, then ParaCruz service is available.

Eligibility is determined solely on the applicant’s own capacities as opposed to those of others with similar problems. It’s a case by case individual functional approach to see if a person can use fixed route service.

Slide 8

Eligibility Process

The eligibility process shall “strictly limit” ADA paratransit eligibility to individuals who qualify for the service. 49 CFR § 37.125

The government is trying to make sure that operators know the categories and their legal obligations. If operators want an undue hardship waiver, they can’t let everyone onboard the paratransit system and expect a waiver.

Income isn’t a factor on either end of the spectrum in terms of ADA paratransit. If you’re poor or wealthy you can qualify, money has nothing to do with eligibility.

Slide 9

ADA Paratransit Eligible

1) Place of residence not considered for ADA eligibility.

- **Do not have to live in service area**
- **Do not have to live in community (visitor)**

49 CFR § 37.123

A rider has to live within the jurisdiction where the provider provides the service. If a rider lives in Santa Cruz County, they would apply through Metro, the provider for paratransit service. You don’t have to live in the service area to register.

Metro is also required to transport visitors on ParaCruz who show credentials from the paratransit program where they are registered or proof of disability and certify that they cannot use the fixed route bus. However, there’s a limitation on how long a rider may use a visitor pass. After that point, a visitor must apply to Metro if they are living here or not use the service if they are from outside the jurisdiction. Credentials from an out of state program also qualify.

Slide 10

ADA Paratransit Eligible (continued)

2) Disability may be temporary (certification should carry a specific

- expiration date) or permanent.
 - 3) **Disability may be intermittent.**
 - 4) **Trip-by-trip determination.**
- 49 CFR § 37.123*

The law made room for practically every area where people would need this type of service. Temporary - Someone had surgery and may need paratransit for only 3 months. Intermittent – you may have good days and bad days with a disability. Trip-by-trip - When certain criteria, established during the eligibility process come together, you could call up and use the service.

Slide 11

ADA Eligibility Process Legal Requirements

- 1) **Eligibility information in accessible formats upon request;**
 - 2) **Eligibility decision within twenty-one (21) days or paratransit service must be provided;**
 - 3) **Written decision; if ineligible, reasons provided;**
 - 4) **If ineligible, Administrative Appeal Process Provided;**
 - 5) **Documentation of eligibility provided; and**
 - 6) **May re-certify eligibility at reasonable intervals.**
- 49 CFR § 37.123,125,127*

The process cannot be unreasonable in terms of administrative burdens. People can't be forced to go through such a strenuous process that they give up because it's so difficult.

Metro's process is that people call up the eligibility coordinator (EC), they set up an interview during which the EC goes through the information with them under the eligibility categories and then a decision is made. Metro re-certifies every three years.

After 10 years of operating the program, Metro recently went through a process to recertify all paratransit participants. To conduct this project, they contracted with Orthopedic Hospital, a nationally recognized organization that works with transit districts on certifications. A registered occupational therapist from Orthopedic Hospital worked with Metro to conduct intake appointments and interviews. Over a period of 18 months, this individual also trained Metro's in-house ParaCruz Eligibility Coordinator to conduct certifications in the future. It was the intention of Metro to transfer these duties in-house once the backlog of certifications was complete. The recertification process was completed sooner than anticipated, and the timeframe to take the program in house was moved up and has already taken place. Orthopedic Hospital is still under contract with Metro to review all paratransit eligibility decisions made by Metro staff.

As part of this process, Metro purchased software from Orthopedic Hospital that provides interview questions to conduct the functional assessment as to a person's ability to use fixed route transit or to qualify for paratransit.

Some Paratransit Coordination Task Force members raised concerns about the skills and qualifications for the position assigned to conduct paratransit eligibility certifications by Metro. Concerns included:

- Previous certifications done by licensed occupational therapist, now there is no medical training requirement for this position.
- If you move away from using a licensed professional, the public would be more confident if there were a specific job description and very clear written criteria upon which decisions are made to address issues of subjectivity and confidence in decision-making
- While several people spoke to the integrity of the individual currently in the position, future people holding this position may not be trained by a licensed professional and the quality of training and skills may erode over time
- The three people who serve on the appeals board are also not medically trained. As lay people, how will they be able to tell if someone has the finer points of being disabled?
- One person thought discussing this item in the absence of the person currently filling the position (who also sits on the task force) was inappropriate
- Other people felt it was appropriate to be talking about the qualifications required for the position, not of a specific person
- The desire to make sure the right decisions are being made and prevent lawsuits

Responses from Metro Staff included:

- Assessments are functional and related to using transportation rather than diagnosing conditions (i.e., can you read a Headways, can you handle coins, etc...)
- They primarily try to determine if people fit into category 1, 2 or 3. The federal regulations are the eligibility criteria.
- There is no legal requirement to have any kind of special certification to do the job of eligibility coordinator
- All decisions are still being reviewed by Orthopedic Hospital and this contract runs through December of 2005.
- If there is a rise in denials, then the program will be looked at carefully
- The number of people rejected is very low (less than 5%). Statistics are available for three different types: restricted, unrestricted and trip by trip (Metro can provide for next meeting.)

Paul Marcelin-Sampson cited re-certification statistics from a September 2003 Metro staff report: 2,277 re-certification interviews were conducted, 146 rejections, 51 appeals, 7 reversals. He calculated that percentage wise, 6.7% of those interviewed did not qualify for service. Of those that were denied, a third appealed and of those that appealed 13% had their decisions reversed. If you carry that all the way through you find that .3% of people wound up with a reversal of their decision, an indication of the success of that process.

Pat Spence cited that when Metro started their re-certification process there were 10,000 people on the rolls. Of that amount 3,000 people have been re-certified. Many of the others were duplicates, have moved or are deceased. (*Pat Spence distributed an attachment from the October Metro packet to clarify.*)

The group agreed to place this issue on our “Pick Up List” for future discussion. It might be good to have a demonstration of the certification process and software.

Slide 12

Eligibility Determinations

The decision of the Appeals Panel will not be disturbed on appeal if it is based on credible evidence, follows the Federal Regulations and is not arbitrary, capricious or unreasonable.

Sell vs. Superior Court of New Jersey, Appellate Division (1997) 298 N.J. Super. 640; 689 A. 2d 1386; 1997 N.J. Super LEXIS 123.

If a person is denied certification, they can appeal that denial to the Appeals Panel. If the Appeals Panel denied certification, the person would have to appeal that to federal court. The litigation would take place in federal court. This would be the standard that the court would use to make a determination as to whether or not they should be certified or not.

Metro recertifies every three years. The regulations don't want you to overburden people by doing it too frequently or going too long (every 1-3 years.)

Additional Chart Presented at Meeting

Additional Qualifying Riders for ADA – Not in categories

- Each eligible rider can bring a personal care attendant at no cost
- Each eligible rider can bring at least one person to accompany him or her on their rider, if space is available more than one person can ride. These people must pay for their ride.
- Qualifying visitors.

Slide 13

Types of Service

Origin-to-Destination Service; *but* on-call accessible bus service *or* Paratransit feeder service to/from accessible fixed routes under certain circumstances.
49 CFR § 37.129

Slide 14

General Rule for Paratransit Services

It is *discrimination* not to provide Paratransit service at a level that is:

- 1) Comparable to transit services provided to those without disabilities; and

- 2) In the case of response time, which is Comparable, to the extent practicable, with the level of service provided to those without disabilities.
42 USCA § 12143(a)

Slide 15

Identical Service Not Required

“...fixed route and paratransit service are different, therefore levels of service must only be comparable – not identical.”

House Report No. 485, 101st Congress, 2nd Sess., pt 1 at 28

Slide 16

Minimum Service Criteria Required

Paratransit Service must meet the requirements set forth in the Code of Federal Regulations. *49 CFR § 37.121(b)*

Slide 17

Six Service Criteria for Determining Comparability

- 1) Service area;
- 2) Response Time;
- 3) Fares;
- 4) Any trip purpose;
- 5) Days and hours of service;
- 6) No capacity constraints.

49 CFR § 37.131

If you meet all six of these you have complied and are not discriminating.

Slide 18

Service Area

Fixed Bus Route

Paratransit Service Area

Within 3/4 of a mile on each side of each fixed route

49 CFR § 37.121(a)

The 3/4 mile minimum is established by federal government and is in the regulation. Non-core service area set at no less than 3/4 mile or through a planning process you can go up to 1 1/2 miles. If you go through a planning process, you can include this “increase” in undue hardship claim.

Slide 19

Paratransit Corridors Including Core Service Area

Paratransit Service Area Jurisdictional

Fixed Bus Route Limit Line

In metropolitan areas, where routes overlap, there may be small areas that are outside the 3/4 mile corridors. But the federal regulations require the service provider to provide service to these areas anyway.

Some Task Force members requested more information on this topic since the subject of service area limitations has come up in many previous meetings. Concerns include:

- To understand if it makes sense to expand the service area, we would need to know what would happen if it went from 3/4 mile to 1 mile or 1 1/2 miles
- How many people are not getting service because they're at 1 mile vs. 3/4?
- What is the cost benefit analysis of how those other riders are being moved around?
- What is the unmet demand and the cost ratios?
- A cost/benefit analysis would be great. Would like to look at it in bigger picture of Metro service.
- There's no fixed route service to the Harvey West area after about 5pm on weekdays, no weekend service, and no alternative bus routes within the 3/4 mile area. On what days and at what times is Metro required to provide service to provide comparability? (Metro now provides ParaCruz 7 days a week, until 10-10:30 at night.)
- Metro provides 6 million fixed route rides, 700,000 rides to seniors and people with disabilities and 100,000 paratransit rides. So we have this 98% vs. 2% situation. Could a fixed route rider file a discrimination claim if he lives in a part of the county where there is no fixed route service, but Metro is serving people with paratransit. Is that discrimination?
- If a low income person or a senior who uses the fixed route system can't get a ride because there's no fixed route service in a particular area, but someone else using paratransit could get a ride to that location, is that discrimination?

Responses:

- Up until about 2 years ago, the transit district served up to 1 1/2 miles along several rural corridors. When that service area was reduced, there was an analysis of people who would be affected.
- Legally the service area can be a different distances on some corridors (it can be inconsistent.)
- A mile and a half is acceptable to the federal government. If you go two miles, you're going beyond what's required and an undue hardship waiver could not take into consideration the extra amount you are doing to relieve you of your obligations.
- Generally, you have to be in a protected class to claim discrimination
- You couldn't provide a cause of action particularly when the regulations say an operator can provide greater and better paratransit service. Government agencies go through a process of deciding where to run a fixed route. As long as those decisions are made reasonably and not discriminating against any one specifically i.e. running only to white neighborhoods instead of Hispanic or black neighborhoods you can expand the paratransit service beyond these standards.

Slide 20

Response Time

METRO has an *affirmative obligation* to design, fund, and implement a next-day service to meet the foreseeable needs of *all* ADA eligible individuals.

49 CFR § 37.131(b)

This is one of the biggest areas in paratransit litigation right now. Next day service is the rule and requirement. A rider can call at 4:55pm and say they want a ride at 6am the next morning.

Slide 21

Response Time

- 1) Must *plan* to meet 100 percent of the demand for next-day service;
- 2) Some leeway for *occasional failures* in unanticipated circumstances to meet actual demand;
- 3) But *if a pattern of noncompliance* develops, METRO must modify its plan.

Anderson v. Rochester-Genesee Regional Transportation Authority, 26 NDLR 134 (2d Cir. 20(B))

Slide 22

Response Time

No magic number of trip denials constitutes a “substantial number.” Analysis requires “case-by-case” analysis and consideration of whether capacity constraints are within the “control” of transit agency.

Dept. of Transportation Response to Federal Appeals Court in the Rochester New York case-October 25, 2002

Courts look at each transit agency individually. If the transit district controls the capacity constraints for whatever’s happening, they’ll be tagged with a violation. If you don’t have enough reservationists to take all the phone calls, the waiting times on the phone calls are too long, someone waits 10 minutes before they get to talk to somebody that’s problematic because people get tired and put the phone down and that’s a denial because they don’t get their ride. If somebody calls in and says “I want to go at 8am and be picked up at 4pm,” and you say you can’t provide the 8am ride because you don’t have any vehicles, you can be tagged with 2 denials, the ride going and coming back. That’s the big controversy and it’s not clear how it’s going to play out. FTA is very strict on these rules.

Slide 23

Paratransit Response Time

- 1) METRO may permit reservations to be made up to 14 days in advance of trip. *49 CFR § 37.131(b)(4)*

2) Reservation services available during normal business hours of the METRO admin offices as well as before any service day.

49 CFR § 37.131(b)(1)

Metro is required to provide next day service. Although Metro is allowed to make reservations up to 14 days in advance, it is not required to take reservations. Ms. Gallagher is not aware of Metro's policy ever being 30 days and it was probably not permissible.

Normal business hours means during the week. Metro's administrative offices are open 8-5, Monday through Friday. That's when you have to make reservations available, as well as before any service day. Any service day is any day the buses run.

Reservations are taken 8-5, 7 days a week. You could not schedule a next day ride at 9pm since it's after business hours. On holidays, there's an automated number that people can call and Metro will call people back to confirm the reservation request.

Slide 24

Response Time (continued)

3) May negotiate pick-up times; cannot schedule a trip more than one hour before or after the individual's desired departure time. *49 CFR § 37.131(b)(2)*

4) "Real time" scheduling used in the taxi industry is encouraged, but not required. *49 CFR § 37.131(b)(3)*

Once a pick up time is negotiated, there's what's known as the "ready window". Metro's ready window is more narrow than one hour. This is an area where Metro provides better service by having a shorter window. The vehicle can arrive 10 minutes before and up to 20 minutes after the scheduled pick up time.

Real time scheduling is done with some return trips such as doctor's appointments since it's not known when the person will be done so it needs to be flexible.

Slide 25

Paratransit Fares

1) The fare cannot exceed twice the fare including transfer and premium charged for fixed route. *49 CFR § 37.131(c)*

2) Personal care attendants ride Free. *49 CFR § 37.131(c)(3)*

Metro's cost to provide a ride on the fixed route bus is \$3.50 vs. \$28 on paratransit.

Slide 26

Paratransit Fares (continued)

3) Social Agency or other organization for agency trips (i.e. trips guaranteed to the organization) may be charged higher fare. *49 CFR § 37.131(c)(4)*

Agency trips are when an organization calls Metro and says they want to have a certain number of guaranteed trips for a negotiated price. Booking these rides is outside the ADA paratransit situation and there's no regulation or limitation on what the paratransit agency can charge.

This situation is different than if someone from an organization is assisting a paratransit rider. Then the regular fare applies. An individual paratransit rider has the right to have an individual within the organization call and book a ride for them.

An agency could not book rides for 50 individuals in one call. The limit is 4 reservations in one call. If you need to make more than 4, you have to call back. That's so that people are not on hold for a long time and to prevent people from always getting a busy signal.

Other related comments included:

- Half of the local paratransit rides are not ADA paratransit. A good portion of those are directly funded by social service agencies that pay for those rides through other funding sources.
- A cost avoidance to ParaCruz is happening by the rides provided by social service agencies.
- Some people who don't live within the $\frac{3}{4}$ mile are transported into the service area so that they can connect with a paratransit ride. Part of confusion is trying to understand how many people are being driven into the paratransit system who have one source of funding on the front end and a second source on the back end. These people could potentially be better served and for a lower price, if there was a vision of doing things differently. Without understanding all of these pieces, it's hard to form an opinion. (This item was placed on issues list.)
- A certain number of riders are being brought into the service area. Others are not being brought in, but are getting rides some other way like MediCal.
- There are also people completely within the service area whose rides are being paid for by services other than the ADA. That's also cost avoidance.
- It's not just a legal question, but has come up other ways that there's a shared vision to enhance service delivery and also be mindful of cost effectiveness. There needs to be an ability to distinguish the data in a way that looks at what's really working well and also at areas where we can increase or enhance service without going into an area that not cost feasible.
- Could we get data on the rides that Metro does not provide? Community Bridges may present some of this information.
- On this issue of rides outside the service area, how would we get this data? Paratransit is in transition now as is Community Bridges. In terms of statistics and analysis, Metro is not sure they can provide information in the next 3 months in terms of latent demand and who's out there. Maybe the Task Force could contribute some of the stories and information to the equation.

At this point, the Chair interrupted the discussion to poll the Task Force on the plumbing problem odors and loud equipment noise. A decision was made to continue meeting. A request was made to contain questions to legal questions. All other issues are to be written on a pick up list. In light of the fact that some people may leave due to the challenging circumstances, the schedule and agenda items for the October meeting were confirmed and the presentation resumed.

Slide 27**Trip Purpose**

No restrictions on trip purpose. No priorities based on trip purpose.

49 CFR § 37.131(d)

Slide 28**Hours and Days of Service**

Must operate same hours and days as the fixed route service. *49 CFR § 37.131(e)*

The regulations specifically exclude commuter service from the requirement of having to provide paratransit service in conjunction with a fixed route.

Slide 29**No Capacity Constraints**

- 1) No restrictions on number of trips an individual will be provided;**
- 2) No waiting lists for access to the service; and**

Must provide for 100% demand.

Slide 30**No Capacity Constraints (continued)**

- 3) No operational pattern or practice that significantly limits the availability of service to ADA paratransit eligible persons. *49 CFR § 37.131(f)***

An operator can't do anything in the way they provide service that would significantly limit the availability of service to an eligible rider. For example, you couldn't have only one person answering the phone or pick up reservations every two days.

Slide 31**Potential Capacity Constraint Problems**

- 1) Telephone reservation capacity and hold time;**
- 2) Trip denials or missed trips;**
- 3) On-time performance;**
- 4) On-Board travel time;**
- 5) Any other time-limiting factors.**

Your plan has to be for 100% demand. There are unplanned circumstances, however, you can't plan for a missed trip.

On board travel times is an issue. Can't stop everywhere because it takes too long. FTA gives some guidance in this area.

Item for the pick up list: Compare fixed route and paratransit travel times for some standard routes.

Slide 32

Due Process Rights

A Paratransit rider must be afforded adequate due process rights prior to any suspension or termination of service. FTA Compliant No.98208

In terms of removing people from the paratransit program, people have to be given due process rights. If someone is violent, you might require that they have a personal care attendant or you might have to put one of your people on a vehicle pending the outcome of the due process hearing.

Some operators have tried to institute a policy that says when you miss five rides you're out. However, the government says that you have to look at how many rides they missed in relation to how many rides they took. Because 5 rides, if you ride twice a day 30 days in the month, may not be substantial. The policy must be reasonable and not capricious.

There's a situation where a paratransit driver sued the transit agency based on the actions of the paratransit rider. The court said that the agency could be held liable in that circumstance because they did not provide a safe working environment or they took no action to protect the individual from the rider.

You'd need to go through a similar due process hearing to deny fixed route service to someone because they need to be riding paratransit. The agency would have to have a factual basis with credible evidence to move the person to paratransit.

Slide 33

Operations/Equipment Requirements

Subscription service.

Equipment specifications.

Proper maintenance of access-related equipment.

Regulations do not require the agency to allow subscription service. But if the agency does, it can only allow to book 50% of capacity. The 14-day advance reservation limitation still applies. Sometimes is a problem in that people forget to call.

There is a plus side to subscription riders that you can really schedule them well. Paratransit is not singular service. Just like the buses, it's shared service so you can have more than one person in the bus as long as you make allowances for the personal care attendant or friend or family member who wants to accompany the person.

Slide 34

Operations/Equipment Requirements

Lift & securement use.

Accommodation of mobility aids & life support equipment.

The provision of accessible information & communications.

Employee training.

The only way that an agency can refuse to take life support equipment is if federal hazardous materials laws don't allow you to take that type of equipment on a vehicle. People are allowed to take service animals on board.

Slide 35

Compliance/Enforcement

- 1) DOT Federal Transit Administration Office Of Civil Rights:**
 - a. On-site Assessments of Fixed Route and Paratransit Programs;**
 - b. Administrative Enforcement (can Jeopardize FTA funding).**
- 2) United States Department of Justice:**
 - a. Seeks compliance through administrative Proceedings and litigation.**

Slide 36

Compliance/Enforcement

- 3) Private Individual:**
 - a. Can pursue complaint through METRO's internal grievance Procedures;**
 - b. Can file an administrative complaint With FTA or DOJ;**
 - c. Can file a civil lawsuit (attorney's fees included in judgment.**
 - d. Lawsuit can include state law violations and request injunctive relief.**

PICK UP LIST

The following concerns came up during the presentation for future discussion and/or research:

1. Eligibility Determination

- Qualified Staff
- Appeals Process

2. Outside Service Area

- Cost/Benefit Analysis
- Pros and Cons (of expanding service area)
- Compare to all Metro Services
- Crossing the county line (outside the jurisdiction)

3. Group vs. Individual Rides (for ADA-eligible person)

4. Request Data on:

- Number of ADA-eligible people outside the service area
- Including the number brought into the Service Area
- And the number of agency rides covering the area outside the Service Area

5. Criteria for Travel Time – compare between fixed route and paratransit

6. Subscription Service (avoid no shows)

6. Mandates and Program Requirements (*continued to October 20 meeting*)

- b. Community Bridges
- c. Others

7. ADA Paratransit Implementation Update (*continued to October 20 meeting*)

- a. Response to Suggestions raised at last meeting

8. Next Meeting – The next meeting schedule was confirmed.

- a. Date, Time & Place: Wednesday, October 20, 2004 from 2:00 – 5:00p.m. at the Santa Cruz Civic Auditorium, ABC Room, 307 Church Street, Santa Cruz.

- b. Agenda Items:

The following agenda items will be continued to the October 20 meeting.

1. Mandates and Program Requirements

- a. Community Bridges
- b. Others
 - Metro Exceeds Legal Requirements (Paul Marcelin-Sampson)
 - MedCAP Issue Brief (Paul Marcelin-Sampson)

2. ADA Paratransit Implementation Update

- a. Response to Suggestions raised at August Task Force meeting

3. Demographics and Definitions (Pat Spence and Paul Marcelin-Sampson)

These potential agenda items were not discussed: Funding Efficiency and Effectiveness OR Customer Service/Satisfaction

9. Adjourn

The meeting adjourned at 5:00pm.

Respectfully submitted by,

Tegan Speiser
Sr. Transportation Planner

**Paratransit Coordination Task Force
Minutes - Meeting # 3**

August 18, 2004, 2:00 to 5:00 pm

ABC Rooms of the Santa Cruz Civic Auditorium

Final

Members Present:

Michael Bradshaw
Scott Bugental
Richard Camperud
Barbara Flynn
Kathleen Johnson
Clay Kempf
Paul Marcelin-Sampson
Roger McKowan
Eileen Pavlik
Dennis Papadopulo
Emily Reilly
Carmen Robles
Ernestina Saldana
Pat Spence
Ellen Timberlake
Adam Tomaszewski
Arturo Zamudio

Alternates Present (* = voting):

Kirk Ance *
Manual Coto *
Steve Kudlak *
James Monroe
Bonnie Morr
Andy Schifffrin

Staff Present:

Bryant Baehr, Metro
Robyn Brown, Yellow Cab
Peggy Gallagher, Metro
Steve Paulson, Metro
Karena Pushnik, SCCRTC
Tegan Speiser, SCCRTC
Link Spooner, Community

Bridges

Sam Storey, Community Bridges
Les White, Metro

Others/Guests Present:

Barbara Jackson
Trudy Jackson

1. Introductions

Attendees introduced themselves.

2. Oral Communications

Barbara Jackson suggested that Lift Line services include reasonable accommodation for hearing impaired individuals and that information about this disability be included in computer records for clients. She also asked that Metro and ADA materials be mailed rather than only available at transit centers.

Paul Marcelin-Sampson announced that Pat Spence would arrive tardy due to a late ride pick up.

Dennis Papadopulo requested that something be done for his wheelchair-using friend in the Pleasant Care facility who has a difficult time visiting his mother because she lives ¼ mile past the bus stop. This item was discussed further with the ADA Paratransit Service item.

Karena Pushnik distributed an updated draft of the Existing Services matrix noting that the chart will continue to be updated as new information becomes available.

Mardi Wormhoudt said that she has had many conversations with people about paratransit issues and reminded attendees that the Task Force had come about to try to address practical problems. She expressed hope that the Task Force can help create a plan that provides efficient, effective and compassionate transportation services. She asked members to set aside bad feelings, mistrust and frustration, and use their talents to look toward the future and the long term.

3. Additions/Deletions to the Agenda

Karena Pushnik distributed additional materials for Item #5.

Pat Spence requested that future agendas include consent and regular agendas so that items that are not discussed can still be formally accepted. There was no objection.

Ms. Spence also asked why the minutes, Item #4, included the Goals/Issues and Work plan when they were also attached to Item # 5. They were considered in Item #5.

4. Approve Minutes of June 16, 2004 Paratransit Task Force Meeting

(Kempf/Robles, with 1 abstention and 2 no votes to Attachment 1) - Approved the minutes with the following amendments:

- Change IHHS to IHSS defined as In Home Support Services
- Add Bryant Baehr to the list of attendees

Paul Marcelin-Sampson distributed his assessment of changes to Attachment 1, the presentation by Paratransit Inc and additional research he has conducted.

5. Mandates and Program Changes

Mardi Wormhoudt provided an overview and explained that planned changes in the provision of ADA Paratransit services warranted discussion and thus a deviation from the work plan. Karena Pushnik described the background materials on legal requirements were provided in the packet about ADA Paratransit, Medi-Cal and the Consolidated Transportation Service Agency.

Additional materials about the Volunteer Center, Cabrillo College and UCSC specialized transportation program requirements were distributed at the meeting.

Emily Reilly requested that the Task Force do its best to move forward as a group reminding the attendees that regardless of who provides the rides, the goal is to provide the best service for the people that need it. She noted that she has been given unanimous direction from the transit board to find out about people's fears, issues and problems, and find solutions. She encouraged people to be forthright and to express their ideas about ways to build trust.

Scott Bugental cited the adage "actions speak louder than words" and requested that the transit board follow through with expressed community interests.

Adam Tomaszewski felt confident that, once the programs are separate, complaints could be better directed to separate agencies (Community Bridges and Metro). He also noted that seniors are currently confused about the future of specialized transportation to meet their needs.

Mardi Wormhoudt asked whether there were changes to the Work Plan and Goals/Issues. There were none.

Bryant Baehr provided an overview of the ADA Paratransit/ParaCruz transition plan and distributed a list of Frequently Asked Questions (FAQs). He noted that: operation of ParaCruz will be fully transitioned to Metro on November 1; space has been leased at 2880 Research Park Drive; transition agreements have been made with the drivers union representing both Metro and Community Bridges; a transition agreement is in place with Community Bridges; Requests for Proposals are out for supplemental service providers (assuming that 1-2 providers will carry 20-30% of the rides), a new telephone system and a mobile communication system; a seamless phone connection between the two agencies has been planned; three new larger vehicles will arrive soon; nineteen vans in storage are being prepared for service; Community Bridges drivers can apply for ParaCruz positions; and a letter has been sent to current clients with information and the new phone number. The plan is to contact current ParaCruz clients a total of three times between now and November. The only update needed to the current ParaCruz Guide (policies and procedures) is the new phone number.

Kathleen Johnson asked what kind of outreach will be provided to 38 residential care facilities and 10 skilled nursing care facilities. Bryant answered that Metro plans to provide information in September to the primary trip generators for ParaCruz.

Michael Bradshaw expressed concern that people who don't read, have cognitive disabilities, use TTY, speak Spanish, etc will have a hard time getting the needed information.

Ellen Timberlake wondered why a supplemental service provider is necessary. Bryant noted that it can be more cost effective to have private operators provide service early in the morning, late at night or on weekends.

Adam Tomaszewski requested that the FAQs for ParaCruz also include information about Community Bridges programs. Bryant suggested that the FAQs for both Community Bridges and ParaCruz be combined for the next wave of outreach to avoid confusion. Sam Storey noted that dispatch operators have also been instructed to provide information about the changes in services.

Michael Bradshaw asked whether the funding for any of the other types of specialized transportation services would be affected by the ParaCruz transition. Bryant answered that he didn't think so.

Clay Kempf wondered whether the several hundred thousand dollar operating deficit experienced by Community Bridges in FY 2002-03 can be paid back by Metro now that Community Bridges will no longer be providing ADA Paratransit services. Sam Storey indicated that Community Bridges will benefit financially by not providing ADA paratransit services and that they may be able to provide more community rides. Bryant answered that Metro had a competitively bid contract with Community Bridges for service and that Metro is not responsible for the deficit.

Sam Storey noted that a possible unintended consequence of the new operations configuration is that private operator and driver availability capacity could be affected. In addition, there could be potential impacts on other services.

Mardi Wormhoudt asked whether a greater percent of service will now be delivered by independent contractors. Bryant answered that currently 55-60% of ParaCruz service is subcontracted to private operators and estimates are that in the future private operators will carry 20-30% of all ParaCruz rides. Mardi also asked whether there will be a net increase in jobs, and both Sam and Bryant answered that they thought it there would be a net increase in jobs.

Tegan Speiser asked for clarification about the total number of ParaCruz clients. Bryant answered that there are 3,600 people in the database and 1,000 frequent users, averaging about 230 trips per day.

Scott Bugental requested clarification about the future of an existing policy that allowed people a ride home if they couldn't pay. Bryant answered that Metro will make every attempt to avoid stranding people, but will be sensitive to patterns. Les White noted that it is likely that staff will make recommendations to the Metro Board at their August, September and October meetings about various ParaCruz policy issues.

Sam Storey provided a presentation about the transition plan from Community Bridges' perspective referring to the FAQs included in the packet. He stated that the approximately 100,000 annual non-ADA rides (Alliance/Medi-Cal, Senior Meal Site, Elderday, TDA, etc.) will continue and that Community Bridges will strive to fill unmet needs in the community beyond ADA Paratransit.

Clay Kempf asked whether Metro intended to pursue funding sources currently used by Community Bridges. Bryant answered that they are currently focused on complying with the law and transitioning ADA ParaCruz and that no other commitments can be provided. The Metro board has not discussed this topic.

Andy Schiffrein asked whether rides will be provided for trips originating outside the ParaCruz service area and whether it will be a connection to ParaCruz or a continuous ride. Sam responded that TDA funds are not sufficient to fulfill requests for all trips throughout the county and, thus far, has focused on medically necessary rides. Bryant will look into the current practice of people getting on and off the vehicle at the service area border and related future policies. Paul Marcelin-Sampson wondered whether Metro perceived an equity difference between bus riders transferring and paratransit riders transferring.

Karena Pushnik will research kinds of contractual/cost sharing arrangements that exist in other areas of the state for rides connecting to ADA Paratransit.

Some attendees provided the suggestions to Metro and Community Bridges to assist with the transition of ADA ParaCruz operations (Attachment 1). ***Both agencies will provide a response to these suggestions to be included in the next Task Force meeting packet.***

The committee decided to postpone the Metro Legal Mandates portion of this item to the next month's agenda due to the lack of time.

6. Upcoming Unmet Paratransit/Transit Needs Public Hearing

Karena Pushnik provided an overview of the purpose of defining Unmet Paratransit and Transit Needs, noting their function as both short and long range needs. She noted that input was received from the Elderly & Disabled

Transportation Advisory Committee, Santa Cruz Metropolitan Transit District, Metro Advisory Committee and the Metro Accessible Services Transit Forum to develop a draft list of needs. The Regional Transportation Commission will hold a public hearing on this topic during their September 2 meeting at 9:30 am at the County Government Center to receive additional testimony.

Mardi Wormhoudt asked attendees whether an integrated system run by one agency might be more efficient in the long term. Many agreed with that vision but would need to know more about the financial implications. A long term integration goal with phased interim goals could be a good approach. *The group agreed to work toward a definition or vision of what success would look like.*

7. Review Specialized Transportation Program/CTSA Structure in Other California Communities – Continued from 6/16/04 meeting

This item was again continued.

8. Accept Information Items

- a. Updated Draft Matrix of Existing Services
 - This item was distributed earlier in the meeting.
 - *Information items from the 6/16 agenda were requested to be included in the September agenda: Disability and age data from 2000 census, Projections through 2050 of people over 65 in Santa Cruz County*

7. Confirm Next Meeting

- a. The next meeting date and time & place was confirmed:
Wednesday, September 15, 2004 from 2:00 – 5:00pm at the Santa Cruz Civic Auditorium, ABC Room, 307 Church Street, Santa Cruz.
- b. Agenda Items:
Chair Wormhoudt confirmed that the next meeting would focus on: 1) Legal mandates for both Metro and Community Bridges; 2) Response to suggestions for ParaCruz service; and 3) Customer Service and Satisfaction

8. Adjourn

The meeting adjourned at 5:00 pm.

Respectfully submitted by:

Karena Pushnik, SCCRTC Staff

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Paratransit Coordination Task Force**Minutes - Meeting # 2**

June 16, 2004, 2:00 to 5:00 pm

ABC Rooms of the Santa Cruz Civic Auditorium

Members Present:

Caroline Bliss-Isberg
Michael Bradshaw
Scott Bugental
Richard Camperud
Barbara Flynn
Norm Hagen
Kathleen Johnson
Clay Kempf
Paul Marcelin-Sampson
Roger McKowan
Eileen Pavlik
Carmen Robles
Ernestina Saldana
Pat Spence
Ellen Timberlake
Adam Tomazewski
Arturo Zamudio

Alternates Present (* = voting):

Kirk Ance *
James Monroe
Edenilson Quintanilla *
Andy Schiffrin (Chair) *
Suzanne Young *

Staff Present:

Bryant Baehr, SCMTD
Peggy Gallagher, SCMTD
Steve Paulson, SCMTD
Pat Dellin, SCCRTC
Karena Pushnik, SCCRTC
Tegan Speiser, SCCRTC
Link Spooner, Community Bridges

Others/Guests Present:

Bill Durant, Paratransit, Inc.
Kevin Welch, Paratransit, Inc.

1. Introductions

Attendees introduced themselves.

2. Oral Communications

Karena Pushnik distributed an updated Paratransit Coordination Task Force roster that includes contact information for Task Force participants. She also reported that the Expenditure Plan for the November 2004 transportation sales tax ballot measure is moving forward. Since the last Task Force meeting, the amount earmarked for Senior and Disabled Transportation in the Expenditure Plan increased from 3 to 4% of the funds that will be raised by the measure.

Pat Spence requested that groups participating in the task force give an overview of their respective agencies and what they do, board of directors, where their authority comes from, funding sources and organizational flow charts. Andy Schiffrin said that item 5a on today's agenda will focus on local paratransit services and that some of her questions may be addressed. He added that members of the task force are welcome to provide information about their organization to the task force.

3. Additions/Deletions to the Agenda

There were none.

4. **Approve Minutes of May 19, 2004 Paratransit Task Force Meeting including revised goal/issue list and work plan.** (Johnson/Kempf) The vote for approval was unanimous.

Regarding item 4.2 in the minutes (number 5, 4th bullet), Pat Spence asked for clarification about what “designating responsibilities” referred to. Staff responded that development of a work plan would include tasks and would probably identify the organizations who would implement the tasks. Ms. Spence noted that Metro staff can not take on any additional responsibilities. Chair Schifffrin clarified that the assignment of responsibilities would be the topic of future agendas.

5. **Review Existing Services and Funding**

a. **Specialized Transportation Services within Santa Cruz County.**

Karena Pushnik reviewed a matrix, still in draft form, that outlines all of the specialized transportation services in Santa Cruz County used by elderly and/or disabled individuals.

This chart is intended to give the Task Force a sense of total amount of specialized transportation rides provided annually in Santa Cruz County, where the money comes from to pay for these rides, the entity overseeing delivery of these rides, and whether there is unmet demand.

Task Force participants reviewed the outline of services offered by each specialized transportation provider and/or program listed on the chart and contributed missing information, changes and corrections to the draft form. RTC staff will update the chart to reflect this new information. A column summarizing transportation services offered by Veteran’s Services to the VA hospitals and In Home Health Services will also be added to the next version.

The specialized transportation services for elderly and/or disabled individuals listed on the chart include:

- Elderly and Disabled Riders on Santa Cruz Metro Fixed Route Transit (bus)
- ADA Paratransit (ParaCruz) provided by Santa Cruz Metro Transit District
- Medi-Cal/Alliance Transportation
- Senior Meal Sites Transportation
- Elderday Transportation
- Medical Service Rides
- Non-Emergency Medical Transport
- Stroke Center Transportation
- Taxi Scrip Program
- MSSP
- Red Cross Paratransit Services
- Volunteer Center Transportation Services
- Laidlaw Transportation Services
- Cabrillo College Disabled Student Services

- UCSC Disability Van Services
- Mental Health Client Action Network Paratransit
- On Call Taxi (Accessible Senior)
- Veteran's Services Transportation
- In Home Health Services Transportation

b. Specialized Transportation Programs in Other California Communities

Karena Pushnik referred to the agenda packet materials regarding Specialized Transportation Ideas from other areas. She offered replacement pages for pages 5-2 to 5-6 that were reprinted to correct typos.

Karena Pushnik introduced the guest speakers from Paratransit, Inc. of Sacramento, a group has been repeatedly recognized for their innovative and successful paratransit programs. Executive Director, Bill Durant, and Mobility Training Coordinator, Kevin Welch, were present to share information about their organization, services, coordination role and especially funding. Karena highlighted that Paratransit Inc. has a dedicated source of revenue through a local sales tax measure.

A summary of Mr. Durant and Mr. Welch's presentations including questions and answers is included in **Attachment 1.**

6. Accept Information Items

- a. Disability and age data from 2000 census**
- b. Projections through 2050 of people over 65 in Santa Cruz County**

7. Confirm Next Meeting

a. Agenda Items:

Chair Schiffirin recommended that the remainder of item 5b regarding Specialized Transportation Programs in Other California Communities be deferred until the August meeting. Additional agenda items for August include: Mandates, Labor Issues and Other Requirements.

Since there are a small number of meetings, he also recommended that people with proposals for the task force to consider on any of the goals and/or issues under the goals, or ideas of ways to improve the system may want to write up those proposals and submit them to the task force before the relevant meeting so people will have a chance to review them and provide thoughtful discussion.

Karena Pushnik added that staff would like to receive items for inclusion in the task force packets at least two weeks in advance of the meeting.

Concern was expressed about how to get information from this meeting to the transit district staff and representatives given that the general manager, assistant general manager and one of the transit district board member and alternate were not present.

Chair Schiffrin acknowledged that a transit district staff member was present and, like all groups represented on the task force, it would be up to the representative to take back information from the meeting to their respective groups.

b. The next meeting date, time and place was confirmed:

Wednesday, August 18, 2004 from 2:00 – 5:00pm at the Santa Cruz Civic Auditorium, ABC Room, 307 Church Street, Santa Cruz. (PLEASE NOTE: No meeting in July.)

8. Adjournment

The meeting adjourned at 5:00 pm.

Respectfully submitted by:

Tegan Speiser and Karena Pushnik, SCCRTC Staff

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Attachment 1

**Presentations by
Paratransit Inc., Sacramento, CA
to the Paratransit Coordination Task Force
Santa Cruz, June 16, 2004**

Guest Presenter:

Bill Durant, Executive Director, Paratransit, Inc.

General Agency Information:

- Paratransit, Inc. (PI) is the CTSA (Consolidated Transportation Services Agency) for the Sacramento area, similar to the role of Community Bridges here in Santa Cruz County.
- Their annual budget is \$10-11 million.
- They are a 501c-3 non-profit organization.
- They provide or support the delivery of about 800,500 paratransit rides per year.
- They provide direct services and operate a maintenance facility that serves 20 agencies and 400 vehicles. The maintenance facility is their version of a “bake sale” (i.e. a profit center that generates revenue, but not yet enough to pay taxes).
- Their entire system is fully automated. They have mobile data computers and antennae on board all vehicles for GPS and GIS. The software they use is called PASS – a product of Trapeze Software, the industry standard for automated scheduling.
- PI started in 1978 by a group of community organizers who developed a concept paper on how human service transportation could be coordinated and at the same time provide accessible transportation for people who aren’t necessarily associated with human service organizations. They wanted to serve people who didn’t go to a meals program, weren’t involved in the disability rights movement or activities designed for people with disabilities, but were in the community and needed to be able to move around in order to survive.
- Initial organizers secured \$300,000 in operating funds from the transit district to begin service and negotiated the use of two vans owned by the community college district. Service was provided to the community college district disabled students; the rest of the time the same vehicles were used to provide paratransit service to people in the broader community.

Service Characteristics:

- Their system has no restrictions. ADA service is provided by PI. In addition, half of the rides delivered are provided by human service agencies.

- PI is purposely segregated from the fixed route system, although the goal is become more integrated. PI's position is that it's time for public transit agencies to begin to shift their paradigm and become the creators/managers of useable transportation, including use of all mobility tools (taxicabs and paratransit). This can be accomplished by: providing different services; using small buses or paratransit vehicles to provide some level of service by day of week and time of day; using different community resources; and grouping all types of riders on the same vehicle. So "those who are temporarily able bodied don't become culturally deprived because they can't ride on a bus with someone who's 100 years old."
- Question: You said that integration is one of the center pieces of your philosophy. In looking at our matrix of all these services here in Santa Cruz and focusing especially on eligibility, I'd like to know what you do in Sacramento to help the consumer, in the easiest way possible, look at their own eligibility, their own needs for flexibility and type of ride frequency and then find the most cost-effective best method? Do you have a centralized method? From a consumer's perspective how does that work?

Answer: Mr. Durant answered that by training he is a social worker. He feels that the whole eligibility process is ineffective. He questioned how many of the meeting attendees ride the bus. He questioned how many people would lie, cheat and steal to get on the bus and if there is a service that people are going to lie, cheat and steal to use, then there should be more of it, not less of it. The focus shouldn't be keeping people off the system, but rather should be getting people on the system. His feeling is let's make everyone eligible, get that off the table and put the money into service. PI used to do ADA eligibility, but gave it back to the transit district. However, they think there remains an issue with the way Regional Transit District (RTD) is doing eligibility. PI feels that the really important component that is missing is "orientation to the system", not eligibility. People are calling up who have no orientation to the service and who think that PI is a taxicab company, which they are not.

- Question: In trying to use paratransit to go to work, the issue of timing arises. For example, if a person is on time for her ride, but another person sharing the ride with her is 10-15 minutes late, the first person then arrives late to work. Does PI have this problem and how do they handle this situation? Does the person going to work have priority over the other person?

Answer: That's an issue. There are some regulations under the ADA that are difficult to deal with when you have people going to work or you have people that are developmentally disabled people where dealing with change is difficult for them. PI allows their drivers to wait 5 minutes or a little longer if they think the passenger is going to make it. They try and protect the rider's time. It's difficult enough to get people to work on time given that the freeway can become a parking lot with one accident, without people being late for their ride. In terms of rider priority, PI tries to get riders to their destinations on time and tries to get there at the same time every day for subscription riders. If a client is calling in every day, that just adds to the frustration. Those are the kinds of issues that need to be worked out as a community in terms of how to handle specific situations. How is the best way to provide that regular ride at the time when someone needs to be there and at the same time provide a shared ride system. Part of it is having people be more conscious not just of themselves, but

of other riders. "This really is the family car and families (recognize) the fact that people can't always be picked up at the same time and we have to deal with that."

- Question: In terms of providing same day trips does PI have a taxi scrip program? How do you fill that gap in the system in terms of meeting people with emergency same day needs?

Answer: PI does same day service and would like to move to real time scheduling. For example, a person could call 3 hours in advance and get a ride. The idea is to get as close to real time as possible so that the decision-making time for public transit service is fairly close to what you can get in your car. Mr. Durant believes that people who don't drive cars should have that kind of service. Funding may be available through a variety of funding sources.

Program Characteristics:

- PI pools its money with human service providers' funds to keep them in business. There's no way the ADA Paratransit program funded by the Sacramento Regional Transit Agency (RTD) could cover the 400,000 rides currently being provided by human service agencies. So it's also in the RTD's interest to work cooperatively and keep those agencies in business.
- Paratransit Inc. provides the human service agencies with vehicles and pays for their insurance, maintenance, fuel and driver training. The agencies provide and pay the drivers and do their own scheduling. PI will provide technical assistance if the agencies want and need it. Their contracts are simple, although each one is different. The agencies define what their interests are. If their interests coincide with PI's interests then they have the basis for doing business.

Mobility Training

- In the spirit of more integration, PI provides mobility training. Last year they trained 629 people successfully to ride the fixed route bus and light rail and calculated savings to the transit district of \$1.4 million. If all of these bus riders took paratransit rides instead, the cost would have been \$1.8 million. PI is trying to make sure that their public transit system serves everyone, not just commuters.
- When Mobility Training started in 1983, PI would help people learn to go wherever they wanted to go (no trip priorities) since their feeling was that wherever people were going was an important trip to that individual.

ADA and Other Paratransit Trip Coordination

- PI is currently providing ADA paratransit transportation for the Sacramento Regional Transit District. It's an expensive service and PI is trying to convince the transit agency to redesign some of the non-productive fixed route service into an integrated system that would provide a level of mobility for everyone in that community. PI is not a replacement for fixed route service, but a complement to it.

- Question: Can you provide a breakdown and associated costs for: 1) strict ADA paratransit trips - within the minimum service area prescribed by law 2) premium trips - outside the service area or at times when there's no fixed route service and 3) social service rides – including the relationships with other agencies that you're providing trips for?

Answer:

ADA Service - The regional transit agency (RTD) pays PI about 45% of the cost to provide service, about \$7-8 million annually. Pure paratransit service costs about \$55-60/hr. In this case the public transit agency is being subsidized by a non-profit. It would be difficult for the RTD to find another contractor who would come up with the other 55% of the cost. PI sees relationship as collaborative.

Agency Service – PI pays an out-of-pocket expense of \$15/hr for this service, far less than the \$55-60/hr cost to provide ADA paratransit. PI gives agencies credit for their in-kind contributions. Agencies provide and pay the driver's wages. PI trains the driver and gets him/her licensed. They also make the driver part of PI's drug screen and pull-notice program so they can keep track of their driver. A little less than half (45%) of the 800,500 trips they provide are of this type. The idea is that by providing and stabilizing human service transportation, it is recognized as a valuable part of the public transit system. It is also important for the public transit agency to realize that if the social service agencies stopped providing rides tomorrow, there would be no way to deal with the increased demand for ADA rides (agency clientele is about 80% ADA eligible). That would then be 400,000 additional trips that would then be calling the ADA call center and in Sacramento, the transit agency is in no position to deal with that. Also, this allows PI to provide subscription service outside of the ADA where there's a limit that only half of the trips can be subscription service. When they are included in to the entire system, productivity goes up. In a pure paratransit ADA system, the best Mr. Durant has ever seen is serving 2 people per hour. The productivity of Paratransit Inc is almost 3 rides per hour. So they are able to do a lot of things by supporting and recognizing the value of what human service agencies are doing. At a cost of \$15/hour, a person could barely afford to operate their own car. All are shared ride systems and contracts have productivity standards that they're expected to meet.

Other Services - PI provides services supported separately through funding generated through their maintenance shop and other activities. Mobility training is about 85% self supporting.

- Question: Could you provide more clarification about the relationship between PI and the social service providers? You provide the vehicle and agencies provide the driver.

Answer: PI pays for some or all of the following: maintenance, fuel, insurance and driver training.

- Question: Does PI interact with the Medi-Cal managed care plans, and if so, what portion do these trips account for?

Answer: PI is not a Medi-Cal provider, but would like to be. No one in Sacramento County can tell PI how much is being spent on transportation through Medi-Cal. There have been times when the regional Medi-Cal office has told clients that they don't do non-emergency medical transportation and to take paratransit instead. The problem is that demand always outstrips the ability to supply services. PI has had to go to legislators and tell them that they can't continue doing providing certain types of transportation. For example, dialysis is a growing industry in the community. In 1978, there were 4 dialysis units, now there are about 25.

- Question: Could you review how much the transit district supplies of your budget? Does that 100% cover the ADA rides? Who monitors ADA compliance?

Answer: About 45-50% of PI budget comes from the transit district. This doesn't cover all of the cost of the ADA rides. ADA compliance is monitored by transit district as they are the agency responsible by law. They have conducted FTA compliance audits and thus far everything is in conformance with federal laws, no one has been sued.

- Question: One of the reasons that the Metro's ADA Program will not allow anyone other than the ADA passenger to ride the vehicle is because they are concerned that if someone else is on the vehicle, then the transit district is subsidizing the social service program instead of transporting their ADA Paratransit individuals and that the ADA passengers have to suffer because someone else is on board. Is that an issue in Sacramento?

Answer: PI doesn't worry about it. Mr. Durant expressed confusion about why anyone wouldn't want to get as many people on the vehicle, since it's out there anyway. PI has identified 10 agencies that are also providing services to people who are eligible under the ADA. If they didn't provide the service, the regional transit district would have to provide the service and it would be much more expensive.

- Question: Regarding coordination issues and referrals, an attempt was made to request a Medi-Cal ride from PI. The caller was told that PI doesn't provide Medi-Cal rides, but no referral was given. The questioner is hearing that we have problems here in Santa Cruz with our patchwork of programs, but it seems to him that it's no different in Sacramento.

Answer: Essentially, PI used to make up a list of other agencies that do Medi-Cal rides, now there are too many. However, if a person is eligible for service, PI will make the trip. Medi-Cal eligibility is not a question that PI would ask someone if they called for a ride.

Neighborhood/Community Transit

- PI operates some "community transit service" where rides can deviate from fixed routes to communities within Sacramento not well served by public transit. PI organized Mobility Committees in these neighborhoods. Residents got involved, were able to secure TEA-21 funds to set up community transit systems and were able to have an impact on how the routes were structured. Because PI already had the real time technology, they set up fixed routes using 24' paratransit vehicles that were able to deviate from a fixed route by $\frac{3}{4}$ of a mile and provide door-to-door service.

- Initially there were two demonstration projects and currently there are eleven neighborhood routes. Every community in Sacramento County would like to have one. They go throughout the neighborhood, tie into major bus lines and they deviate providing door-to-door service from a residence or senior center. This flexibility alleviates the difficulty of a bus dropping people off at a mall and riders then having to walk across the parking lot to get to the entrance. All vehicles providing this service are accessible.
- PI has also partnered with a local Transportation Management Association (TMA) to provide community transit in a developing neighborhood. Subscription type service is provided during the peak period for people to get to and from work. In the off peak period, they provide real-time, demand-responsive door-to-door service. In addition, door-to-door links are provided to the regional transit system bus or light rail stops enabling people to go anywhere in the community served by transit. Service is provided in real time. From the time a phone call is placed, PI guarantees to pick up clients within 15 minutes. Shared rides are used as much as possible. As the universe of riders grows, the opportunity for shared rides increases.
- PI thinks this model would work in a lot of communities where neighborhoods are well-defined and where amenities are available that support neighborhoods. Because many of the trips that people want to make are within their own community, the system has both senior citizens and young people being sent to the store by their parent on the same buses. PI sees buses as kiosks running through the neighborhood where notices can be posted to sell refrigerators, find a babysitters, find homes for puppies, or take in wash, for example. "The bus becomes the new front porch; it's how you meet your neighbors. It becomes a whole new set of eyes and it's got radio contact so you can provide a level of security that wasn't there before. In some neighborhoods that's really important."

Labor Issues:

- PI has been a union shop since 1981 and is currently an Amalgamated Transit Union (ATU) property. Even being a union shop, PI and other operators can provide service at a lower cost than the transit district. PI believes that we need to start making the best possible use of the technology that's available. We can create systems that are reflective of the communities we live in.
- PI can provide service in communities that, because of the densities or the way they're constructed, are not good for fixed route service. They can provide service in those types of settings to connect people to fixed route service. The travel time getting from one community to another can be cut if that service is reallocated rather than meandering through suburban communities.
- Question: If the agency hires the drivers that are trained by PI, what is the relationship between the agency drivers and those that work specifically for PI? All they all part of the same union? Do they coordinate with each other or are they totally separate?

Answer: All drivers are part of the Sacramento Mobility Coalition. For example, PI will coordinate with human service agencies when they receive a request from a nursing home to do a group trip such as lunch downtown. PI may not be able to do that trip themselves. However, since they know that a certain agency doesn't use their vehicles during the hours needed, they make a deal with the agency with the vehicle to do the trip for PI at a negotiated price.

- Question: You said that the agencies that collaborate with you use non-union labor. The contract between Community Bridges/Lift Line and UTU forbids this practice. Was there union opposition to this and how did you overcome it? Also, who represents the fixed route drivers?

Answer: PI is aware that they are the agency charged with managing the paratransit system, not the union Amalgamated Transit Union (ATU). PI understands that the ATU has the responsibility of doing what's in the interest of the rank and file. The ability to contract out service is critical to the job PI is charged with doing and they make that clear to the ATU. It's a collective bargaining process so you give a little, you get a little. PI makes sure that they have a contract that still allows them to manage their system. The same ATU local represents the fixed route drivers as well.

- Question: There is no labor savings in driving a smaller vehicle since what drivers are paid is not a function of the size vehicle they drive. How did you address that?

Answer: The driver cost dictates the hourly cost of the service. The most expensive piece of the trip is the driver. Some properties have a dual wage system. PI pays less for specialized transportation drivers than fixed route transit drivers. However, it's important to understand this from a historical perspective. The wages that are being paid to fixed route drivers, come from a time in the early 70's when transit districts were awash in funding from the Transportation Development Act. Local service was run by people that were very smart and they were able to take advantage of the availability of that money. Unions did a good job in getting some of that money for their members. There isn't anyone who's awash in money now, so there is a need to bargain from a different perspective.

Funding:

- PI currently receives 1.8% of revenues generated by a local sales tax. A November 2004 ballot measure proposes to increase that amount to 4.5% of the revenues raised.
- PI works to help build a constituency for public transit. If public transit is going to thrive and survive in Sacramento, it needs a constituency. PI takes this on and participates in how Sacramento presents its public transit product.
- Question: PI receives \$7 million annually from the transit agency. What percentage of the transit agency's overall budget is that?

Answer: Of the transit district's \$100 million budget, it's about 7%. PI's board is committed to the ADA and to making the promises of the ADA a reality. PI is very aggressive about

being an advocate for opportunities to create partnerships for an integrated public transit system (rather than just for more money for a segregated paratransit system).

- Question: With all of the merged funding sources to make the system more efficient, how do you satisfy your funders that you're not using their money to transport someone who is not one of their clients?

Answer: PI stopped asking for funds from the Area Agency because they wanted too much documentation which drove up costs. PI let the nutrition programs go after that funding. PI will then subcontract with the social service agencies. The program that gets the most varied funding is the Mobility Options. They get funds from the Regional Center, community service block grants, regional transit funding and they handle that within their program. Most of it is computerized.

- Another issue is that sales tax money in Sacramento is designated specifically for transportation for elderly *and* disabled. Elderly is defined as 75 or older. A lot of people that are ADA eligible are not being defined as ADA, they are being defined by age and that's all being handled through the mail.
- Question: Can you clarify the amount of sales tax that PI receives?

Answer: After the money comes off the top of the sales tax, PI gets 1.8% of what's left. What this means in terms of real dollars is about \$1.6 million/year. This is a fairly stable source of revenue although it has the ability to grow if people buy more refrigerators and cars.

- Question: How are the neighborhood rides funded and how do they relate to fixed routes? How many of these neighborhood transits are there? And are they accessible?

Answer: Initially they were funded through a TEA 21 federal grant to Sacramento County. Federal dollars were matched with a coalition of paratransit, advocacy groups like the Commission on Aging for Sacramento County and Department of Human Assistance who had welfare to work money. Those operating now are exclusively funded through the regional transit district because the communities are asking for this type of service. The regional transportation provider is working to upgrade their technology so can go real time (without 24 hours in advance scheduling).

Eligibility/Orientation

- PI has discussed an idea to develop something like a credit card or other identification mechanism for people that would store the types of transportation options available specifically to them. Once eligible, a person could call PI and they would do an orientation over the phone on all the services that person can use and connect clients to mobility options/training. What's missing in Sacramento, and he suspects here as well, is a lack of understanding by clients about what's out there or how to get it. He sees this as a problem associated with eligibility, which is handled mostly through the mail without seeing people.

- From PI's perspective, it's all about the orientation. The goal is to cut down the time their call takers are on the telephone so that every time someone calls for a ride, they don't need to teach them how to use the system.

Guest Presenter:

Kevin Welch, Mobility Training Coordinator, Paratransit, Inc.

General:

- During Kevin's 9 months in 1987 developing a Mobility Training Program for Santa Cruz Metro, surveys were taken to assess the community's needs and about 50 people were trained in 4 months. Community outreach is big factor in the success of mobility training.
- PI's Kevin Walsh was in Santa Cruz County for 9 months in 1987 during which time he developed the mobility training program for Santa Cruz Metro. He was thrilled to see that the brochure he produced is still in use. However, he expressed concern that he hasn't heard much about mobility training at the Task Force meeting and wondered whether it was still happening and viable. METRO said that they trained 30 people in the past year.

Program Information:

- In Sacramento, PI has 6 full time mobility trainers who go out in the community every day training seniors and people with disabilities. The annual budget for Mobility Training is \$50,000. Trainees are referred from a wide variety of sources. Community outreach is a key component of the Mobility Training Program. Kevin's job is to visit the senior centers and residential facilities to get the word out about mobility training. He also works with the transit district to have them publicize the mobility training program. Recently, a new policy was adopted by the transit district that everyone 75 years or older is entitled to a lifetime bus pass so they'll never pay for public transit again. This is a real enticement for seniors to get comfortable riding fixed route service and helps reduce the need /cost for ADA paratransit.
- PI and the Sacramento RTD are trying to create "bus riders for life." When faced with the option of using the free lifetime bus pass vs. paying \$6 to ride paratransit, seniors usually choose the free public transit option. When seniors start using the transit system, they notice the beauty parlors and bakeries that they can get to by bus. PI has found that there are two main reasons people don't take the bus 1) they rely on family and friends for rides and 2) or just don't know how. PI also arranges senior group trip training where they will take 10-15 people out on an initial bus experience trip. If there is interest, PI will follow up with one-on-one or up to three-on-one training. Out of the 8,560 people trained since the program's inception 4,040 were seniors, the rest were developmentally and physically disabled individuals.
- PI's trainees are taught how to use the bus, how to make transfers, how to travel the streets safely, and how to advocate for their mobility needs. They are advised about what they are entitled to when using public transit, and about how to communicate their needs to bus drivers.

- Statistics for mobility training 2002-2003: Cost avoidance of \$1.4 million annually to transit; 629 people successfully trained. About 84-90% of the people trained continued to ride transit 3 months later.
- Trainers have found that they can go into a center and find a senior who is interested in acting as a mobility training organizer for the entire community. One example is Trudy who is almost 90. She approached them to come into the facility where she lived because she observed neighbors pulling out of the parking lot and almost getting hit. Since the time Trudy contacted them a year and a half ago, PI has trained 163 people out of the 313 residents to ride transit. Now Trudy sends PI referrals directly. Once trained, seniors are also able to take the bus down to city hall to ask for what they need. PI took a whole group to city hall to bring forth issues about a certain traffic light that was not long enough for them to cross the street safely. (In six days, the crossing light time was corrected.)
- A component of the Mobility Training program includes use of an out of service bus to teach trainees how to use the lifts before they ever get out to the streets, so that when the bus arrives, they know how to board and de-board the bus. This greatly assists transit drivers.
- PI is also involved in sensitivity training of regional transit drivers about disabled riders. PI spends a full day out in the community, putting drivers in blindfolds, wheelchairs and visual acuity glasses. They take them to one of the malls and have them spend an afternoon trying to order lunch and get around with these limitations. Then come back and discuss the experience. It has a great impact on the drivers when they actually get out on the street.
- PI mobility trainers have flexible hours beginning and/or ending sessions based on client needs. They get referrals from their Regional Center (like our San Andreas) the Department of Rehabilitation. For no cost, PI provides individuals with an ID, valid bus pass sticker for time they are training, and assistance in filling out the ADA applications in case they need to use paratransit for some or all of their trips. PI also considers itself a mobility options department: advising trainees about their transportation options including how to use light rail. In the future PI may have ambassador or buddy programs.
- Regarding training manuals, PI found that seniors like to have written resource materials. PI creates different books for each place that they train. PI also has developed a Mobility Training Certification handbook that includes what the trainer has to learn. The key is to hire people who have excellent people skills, are compassionate and that will do a good job.
- Question: Please explain more about free bus passes for people 75 and over.

Answer: This program was devised by the public transit agency to create an incentive for seniors to look at using bus and light rail transit first rather than using paratransit. Public transit should be the first mobility option people should think about when they lose their driver's license, not complementary ADA Paratransit.

Comment: This is a concept that could really help both Metro and paratransit: a free bus pass at \$23/month is equivalent to the cost for approximately paratransit trip. (

- Question: What type of programs has PI or the transit district created to encourage people to use public transit besides the free 75+ bus pass? One of the problems here is ridership is not expanding. How do we entice people to ride the bus?

Answer: First, by showing people that they can easily use public transit. Second, there is a benefit to creating relationships; training one senior, doesn't accomplish what happens when two are trained. When people move to a senior facility, they usually don't know anyone. If a couple of people can teamed to ride transit together, they start going out into the community more. Then they tell some more people and it snowballs. They have groups of people that they see out in the community all the time. They go out together shopping, and forming groups. They're forming lunch clubs. The biggest incentives are free or reduced passes. PI doesn't offer hats and bags or cutesy things like that. What the bus pass offers is independence and freedom of mobility. Paratransit in Sacramento requires one to two days advance notice. Public transit users can travel where ever they want to go – whenever the bus is running.

Funding:

- Question: You said the bus passes are given away free by the regional transit. They must be subsidized. How are they paid for?

Answer: The regional transit agency has chosen to pay for them out of their operating budget and find that it saves them ADA paratransit costs.

Paratransit Coordination Task Force

Minutes

Meeting # 1: May 19, 2004, 3:00 to 5:00 pm

ABC Rooms of the Civic Auditorium

Members:

Mardi Wormhoudt, Chair
Michael Bradshaw
Scott Bugental
Richard Camperud
Kanoa Dynek
Barbara Flynn
Norm Hagen
Kathleen Johnson
Clay Kempf
Paul Marcelin-Sampson
Roger McKowan
Eileen Pavlik
Dennis Popadopulo
Emily Reilly
Carmen Robles
Ernestina Saldana
Pat Spence
Adam Tomazewski
Suzanne Young
Arturo Zamudio

Alternates (* - voting):

Kirk Ance *
James Monroe
Bonnie Morr
Edenilson Quintanilla *
Andy Schiffrin

Staff:

Bryant Baehr, SCMTD
Mark Dorfman, SCMTD
Peggy Gallagher, SCMTD
Eileen Hooten, Community Bridges
Steve Paulson, SCMTD
Karena Pushnik, SCCRTC
Tegan Speiser, SCCRTC
Link Spooner, Community Bridges
Sam Storey, Community Bridges
Les White, SCMTD

Others:

April Axton, SCMTD
Susan Hogue, Epilepsy Network
Camilla Shaffer, Laidlaw Transit

1. Introductions

The attendees introduced themselves.

2. Additions/Deletions to the Agenda

There were none.

3. Process of Decision Making

The Task Force discussed and agreed to the following by consensus (in priority order):

Quorum Required: A quorum of the Task Force must be present for the meeting to be held and any decisions to be made. A quorum is defined as 50% + 1 of the 24-member Task Force. Therefore, the presence of 13 or more members/alternates will constitute a quorum for this Task Force.

- I. The group will aim to reach consensus on issues.
- II. The Gradients of Agreement, as presented by SCMTD Director Reilly, will be used when consensus cannot be reached.

- III. Voting will be used if the other two methods are not successful. A motion will pass with a simple majority (50% + 1) of the voting members present. A tally of votes on each motion will be recorded for the meeting minutes including the number of yeses, nos and abstentions.

4. Identify Overall Purpose & Goals

By consensus, the following issues were added or amended to the goals forwarded by the SCCRTC (shown in underline/strikeout format). The group indicated a desire to prioritize identified actions and differentiate between short and long term goals.

Goal 1: The paratransit System will use funding as efficiently and effectively as possible.

- Make the ~~bus~~ transit system and related infrastructure more accessible (e.g. sidewalks, coordination with planning/public works departments on land use, etc.)
- Increase ridership amongst those with functional abilities (e.g. Mobility Training)
- Maintain fair funding allocations without disadvantaging one group over another
- Encourage accessible multi-modal transportation choices

Goal 2: The paratransit system will strive to maximize customer service and satisfaction.

- Customer service (phone hold times, ~~timeliness of~~ eligibility determination, etc.)
- Countywide availability of accessible vehicles (including taxi scrip)
- Clear transportation system understanding/expectations and community outreach (riders, caseworkers, counselors) *This item moved from Goal 1*

Goal 3: Legal mandates shall be observed.

- Assurance that legal requirements will be met (ADA, Area Agency on Aging, MediCal, TDA, CTSA, Motor Vehicle laws)

Goal 4: Increase funding for specialized transportation services.

5. Review and Approve Issues, Draft Work Plan & Meeting Schedule

The Goals and Issues were addressed as one item in #4.

By consensus, the Task Force agreed to the following:

- The June meeting will include a review of current services including funding and existing local/statewide programs.
- The July meeting is cancelled.
- The August meeting will focus on Goal 3: Legal Mandates and Constraints. Peggy Gallagher (Metro Staff) will provide materials and give a presentation at the meeting.
- Future meetings will focus on discussing the remaining goals, formulating recommendations, developing an action plan and designating responsibilities.
- Andy Schiffrin will be the vice chair.

6. Information Items

The Expenditure Plan for the ½ cent sales tax measure to be placed on the November 2004 ballot was discussed and a few people noted that the funding level included in the Plan for Elderly and Disabled Transportation is not adequate. Attendees were encouraged to attend the RTC's June 3 evening public hearing or send written comments to the SCCRTC.

Other suggestions for staff follow up:

- Expand the current services matrix to include current funding for services
- Explore creative funding opportunities such as Project Action and Easter Seals
- Allow time during discussions for brainstorming to be followed by reality checks

7. Announcements

Association for Monterey Bay Area Governments Elderly & Mobility Conference (6/25/04) draft agenda distributed.

The binder contents were reviewed.

8. Review future meeting time/date

By consensus, it was agreed that future meetings will be held from 2:00 to 5:00 pm on the third Wednesday of the month at the Santa Cruz Civic Auditorium ABC Room. The next meeting will be June 16, 2004.

9. Adjournment

The meeting adjourned at 5:00 pm

Respectfully submitted by:

Karena Pushnik and Tegan Speiser, SCCRTC Staff

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Specialized Transportation Services Currently Available in Santa Cruz County ~ DRAFT (per FY 2002-03 information)

Updated: 3/15/2005	E/D on Fixed Route Bus Transit (5)	ADA Paratransit - ParaCruz (7)	Medi-Cal/ Alliance (8)	Senior Meal Sites	Elderday	Medical Service Rides (9)	Stroke Center	Taxi Scrip (10)	MSSP	Red Cross	Volunteer Center	Laidlaw	Cabrillo College Disabled Student Services	UCSC Disability Van Services (on campus)	Mental Health Client Action Network	On-Call Taxi (Accessible/ Senior)	Veterans Services	In Home Health Services	Non- Emergency Medical Transport	Total (11) (based on avail info)	
	# of one-way rides/trips for paratransit in FY 02-03 (1)	(see below)	105,989	34,096	22,502	31,429	10,752	1,671	3,690	1,796	1,811	6,130	63,900	4,720	9,000	4,800	12,843	2,065	unknown	?	317,194
	# of one-way rides/trips for S/D fixed route in FY 02-03 (5)	542,275	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	542,275
	Coordinator of Service	Metro	Metro	Medi-Cal/ Central Coast Alliance for Health	Community Bridges	Salude para la Gente	Community Bridges	Stroke Center	Community Bridges	County	Red Cross	Volunteer Center	San Andreas Regional Center / Laidlaw	Cabrillo	UCSC	MHCAN	Private Operators	County Veterans Service Office	Coordinated between caregiver and client	Hospitals	
	Provider of Transportation Service	Metro	Community Bridges & Taxis	Community Bridges / private cabs / Tri-County services	Community Bridges	Community Bridges	Community Bridges	Community Bridges	Taxis	Taxis through Community Bridges	Red Cross' volunteers	Volunteer Center's volunteers	Laidlaw	Cabrillo	UCSC	MHCAN	Private Operators	CVSO, DAV volunteers & VA employees	Caregiver car. May ride with other existing services.	Tri-County, Central Coast Ambulance, American Medical Response	
Eligibility	Discount fares for disabled or seniors age 62+ (6)	Unable to ride fixed route transit	Income and medical need / not eligible for transit	Age - Mealsite manager determines	Elderday staff	Medically necessary rides only	Stroke Center	Income, age, disability	MSSP (County)	Medical need outside SCZ Co.	Seniors (55+) and disabled/ non-WC	Develop- mentally disabled adults	Cabrillo students w/ special needs	must have eligible temporary/ permanent disability	County Mental Health client	n/a	Veterans	Income, assets and functional need	Hospital discharge staff		
Fares	50% discount of regular fares	\$3 each trip (double fixed route prices)	no	no	no	no	no	\$8 or \$15 for \$30 of Scrip depending on income	no	\$10-20 donation	no	no	no	no	no	Based on mileage, discounts for E/D riders	no	None for caregiver car, only for accompany- ment time	\$65-\$115		
Funding	n/a	\$2,565,293	\$1,304,407	\$209,868	\$230,037	\$319,354	\$60,588	\$37,904	\$26,455	\$12,040	\$71,208	n/a	\$29,696	n/a	\$10,000	n/a	n/a	\$0	\$144,368	\$4,876,850	(12)
Funding Amounts/ Types (2)	TDA, State & Federal Transit Operating Funds, 1/2 cent sales tax, fares	92% -Metro Operating funds, 8% fares	No fixed budget, carries annually 50% State, 50% Federal	44% Nutrition Program, 20% AAA, 20% City of Cap, 12% City of SCZ, 2% City of Wats, 1% City of SV, 1% clients	95% Elderday, 5% County (Area Agency on Aging)	100% TDA	TDA, Cabrillo	76% TDA, 24% client	100% State	TDA, donations, fundraising, Medi-Cal/ Alliance	90% TDA, 7% fund raising, 3% donations	80% Federal Medicaid, 20% State	Student Fees, State funds	Student Transit Fees and Parking Fees	25% federal, 50% county, 25% private donations	fares	100% Federal	n/a	Private Pay, MediCal/ Alliance, Hospitals or Insurance		
Unmet Demand (3)	yes	none	none	yes, esp. in South Co. (hold hearing annually)	none	yes	attendance in program based on transportation availability	yes (35 on wait list)	yes		yes, rides limited to available volunteer drivers	none	none		yes, beyond 5 mile service area	None	yes, in South County	possibly	yes, due to affordability		
Governing Board (4)	11 members + 1 ex-officio (Co 5, Cities of Santa Cruz - 2, Wats - 2, Cap - 1, SV - 1, UCSC - ex.officio)	11 members + 1 ex-officio (Co 5, Cities of Santa Cruz - 2, Wats - 2, Cap - 1, SV - 1, UCSC - ex.officio)	Alliance - 16 members (8 from Santa Cruz Co., 8 from Monterey Co.), Medi-Cal is a federal agency	12 members	12 members	12 members	12 members	private companies	taxis private companies, 12 member board for Community Bridges	11 members	10 members	private, for- profit company	7 members	Transportation and Parking Services (TAPS) with oversight by Business/ Administrative Services	10 members	private companies	VAMC Palo Alto	n/a	12 members		
Advisory Committees (4)	official - MAC, MASTF; semi- official - E/D TAC; unofficial - Riders Union	See box to left	Member Services, Physicians, Allied Health Providers	E/D TAC, AAA	E/D TAC	E/D TAC	Cabrillo Board, Stroke Center, E/D TAC	none		E/D TAC	E/D TAC	none (?)		Transportation Advisory Committee, Transit Oversight Committee	none	none	none	IHSS Advisory Committee	E/D TAC		

NOTES: n/a - Not Available

1 Number based on funding source, not destination. On-Call Taxi rides based on estimates provided by Courtesy Cab and Yellow Cab.

2 Transportation Development Act (TDA) funds may be used for overhead/administration or the provision of rides.

3 Unmet Demand includes situations were there are waiting lists and/or funding constraints which prevent greater use of the program. Some systems may not legally allow denied trips.

4 For service provider

5 This figure, calculated by Paul Marcellin-Sampson and endorsed by Metro, represents the MINIMUM number of trips that could be made based on sales of Senior and Disabled trip, day and monthly passes. The MAXIMUM number of trips is estimated at 699,680. Excludes the Highway 17 Express and specialty shuttle services. The Metro also provides Mobility Training to assist seniors and disabled individuals to learn to use the bus.

6 Disabled includes those with certification form from medical practitioner, Medicare ID, Disabled person parking placard or Disabled veterans ID.

7 ADA service currently contracted to Community Bridges with taxi subcontractors. Will transition to in-house service by SCMTD in late 2004.

8 Medi-Cal/Alliance rides also provided by private taxis, and Tri-County Transportation (for trips between Santa Cruz and Monterey Counties)

9 Medi-Cal/Alliance riders not eligible

10 Can buy 3 months at a time, scrip has no expiration date or client name

11 Based on available info. Does not reflect senior and disabled rides provided on fixed route transit (see note #12) and those provided by American Cancer Society, Aptos-Capitola Village Taxi, City of Capitola Seasonal Shuttle, Delux Cab, Greyhound, West Coast Limos/Sedans, Care-A-Van for Kids, Davenport Resource Service Center, Doran Center for the Blind & Visually Impaired, and Tri-County (and other ambulance services). These groups also provide small amounts of specialized transportation rides.

12 Total funding amount is incomplete because it does not include information from five entities.

LEGAL REQUIREMENTS FOR METRO PARACRUZ

METRO

ADA Title II

A public entity fixed route operator must provide complementary, comparable paratransit service to individuals who because of their disabilities cannot use the fixed route service unless it would be an undue hardship.

42 USCA § 12143(a)

METRO

Fixed Route Operator

METRO is a Fixed Route Operator whose fully accessible bus fleet carries approximately 6 million people annually, 700,000 of whom are disabled or seniors.

49 CFR § 37.121

METRO

Complementary Service

Paratransit Service is not a substitute, but a complement or "safety net" for those who are unable to use the fixed route system because of their disabilities.

49 CFR § 37.121

METRO

"Comparable" Service

Paratransit Service must meet the minimum criteria set forth in the federal regulations to be "comparable".

49 CFR § 37.121

METRO

Can Provide More and/or Greater Service

Nothing in Federal Law prevents METRO from providing more or greater paratransit service or service to more individuals than the ADA requires.

42 USCA § 12143(f)(1)-(3)

METRO

Eligibility Requirements

All persons unable to use the fixed route service because of a disability and their companions are eligible for paratransit service.

42 USCA § 12143(c)
49 CFR § 37.123

METRO

Eligibility Process

The eligibility process shall "strictly limit" ADA paratransit eligibility to individuals who qualify for the service.

49 CFR § 37.125

METRO

ADA Paratransit Eligible

- 1) Place of residence not considered for ADA eligibility.
 - Do not have to live in service area;
 - Do not have to live in community (visitor).

49 CFR § 37.123

METRO

ADA Paratransit Eligible

(continued)

- 2) Disability may be temporary (certification should carry a specific expiration date) or permanent.
- 3) Disability may be intermittent.
- 4) Trip-by-trip determination.

49 CFR § 37.123

METRO

ADA Eligibility Process Legal Requirements

1. Eligibility information in accessible formats upon request;
2. Eligibility decision within twenty-one (21) days or paratransit service must be provided;
3. Written decision; if ineligible, reasons provided;
4. If ineligible, Administrative Appeal Process provided;
5. Documentation of eligibility provided; and
6. May recertify eligibility at reasonable intervals.

49 CFR § 37.123,125,127

METRO

Eligibility Determinations

The decision of the Appeals Panel will not be disturbed on appeal if it is based on credible evidence, follows the Federal Regulations and is not arbitrary, capricious or unreasonable.

Sell v. Superior Court of New Jersey, Appellate Division (1997) 398 N.J. Super. 640; 689 A. 2d 1386; 1997 N. J. Super LEXIS 123.

METRO

Types of Service

Origin-to-Destination Service; but on-call accessible bus service or Paratransit feeder service to/from accessible fixed routes under certain circumstances.

49 CFR § 37.129

13

General Rule for Paratransit Services

It is *discrimination* not to provide paratransit service at a level that is:

- 1) Comparable to transit services provided to those without disabilities; and
- 2) In the case of response time, which is comparable, to the extent practicable, with the level of service provided to those without disabilities.

42 USCA §12143(e)

14

Identical Service Not Required

“... fixed route and paratransit service are different, therefore levels of service must only be comparable - not identical.”

House Report No. 445, 101st Congress, 2nd Sess., pt 1 at 28

15

Minimum Service Criteria Required

Paratransit Service must meet the requirements set forth in the Code of Federal Regulations.

49 CFR §37.121(b)

16

Six Service Criteria for Determining Comparability

- 1) Service area;
- 2) Response time;
- 3) Fares;
- 4) Any trip purpose;
- 5) Days and hours of service;
- 6) No capacity constraints.

49 CFR §37.131

17

Service Area

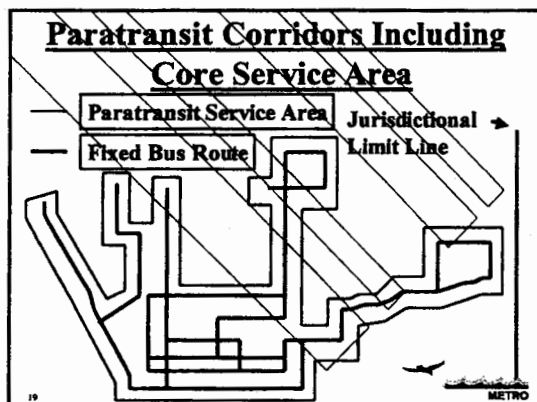
Fixed Bus Route

Paratransit Service Area
Within 1/4 of a mile on each side of each fixed route



49 CFR §37.121(a)

18



Response Time

METRO has an *affirmative obligation* to design, fund, and implement a next-day service to meet the foreseeable needs of *all* ADA eligible individuals.

Dept. of Transportation Response to Federal Appeals Court in the Rochester New York case-October 23, 2002

49 CFR §37.131(b)

20 METRO

Response Time

- 1) Must *plan* to meet 100 percent of the demand for next-day service;
- 2) Some leeway for *occasional failures* in unanticipated circumstances to meet actual demand;
- 3) But if a *pattern of noncompliance* develops, METRO must modify its plan.

Anderson v. Rochester-Geneseo Regional Transportation Authority, 26 NDLR 134 (2d Cir. 2008)

21 METRO

Response Time

No magic number of trip denials constitute a "substantial number." Analysis requires "case-by-case" analysis and consideration of whether capacity constraints are within the "control" of transit agency.

Dept. of Transportation Response to Federal Appeals Court in the Rochester New York case-October 25, 2002

22 METRO

Paratransit Response Time

- 1) METRO may permit reservations to be made up to 14 days in advance of trip.

49 CFR §37.131(b)(4)

- 2) Reservation services available during normal business hours of the METRO admin offices as well as before any service day.

49 CFR § 37.131(b)(1)

23 METRO

Response Time
(continued)

- 3) May negotiate pick-up times; cannot schedule a trip more than one hour before or after the individual's desired departure time.

49 CFR §37.131(b)(5)

- 4) "Real time" scheduling used in the taxi industry is encouraged, but not required.

49 CFR §37.131(b)(5)

24 METRO

Paratransit Fares

1. The fare cannot exceed twice the fare including transfer and premium charges for fixed route.

49 CFR §37.131(c)

2. Personal care attendants ride free.

49 CFR §37.131(e)(3)

25

METRO

Paratransit Fares

(continued)

3. Social Agency or other organization for agency trips (i.e. trips guaranteed to the organization) may be charged higher fare.

49 CFR §37.131(b)(4)

26

METRO

Trip Purpose

No restrictions on trip purpose. No priorities based on trip purpose.

49 CFR §37.131(d)

27

METRO

Hours and Days of Service

Must operate same hours and days as the fixed route service.

49 CFR § 37.131(e)

28

METRO

No Capacity Constraints

1. No restrictions on number of trips an individual will be provided;
2. No waiting lists for access to the service; and

29

METRO

No Capacity Constraints

(continued)

- 3) No operational pattern or practice that significantly limits the availability of service to ADA paratransit eligible persons.

49 CFR § 37.131(f)

30

METRO

Potential Capacity Constraint Problems

1. Telephone reservation capacity and hold times;
2. Trip denials or missed trips;
3. On-time performance;
4. On-Board travel time;
5. Any other time-limiting factors.

31

Due Process Rights

A Paratransit rider must be afforded adequate due process rights prior to any suspension or termination of service.

FTA Complaint No. 98208

32

Operations/Equipment Requirements

- Subscription service.
- Equipment specifications.
- Proper maintenance of access-related equipment.

33

Operations/Equipment Requirements

- Lift & securement use.
- Accommodation of mobility aids & life support equipment.
- The provision of accessible information & communications.
- Employee training.

34

Compliance/Enforcement

1. DOT Federal Transit Administration Office of Civil Rights:
 - a. On-site Assessments of Fixed Route and Paratransit Programs;
 - b. Administrative Enforcement (can jeopardize FTA funding).
2. United States Department of Justice:
 - a. Seeks compliance through administrative proceedings and litigation.

35

Compliance/Enforcement

3. Private Individual:
 - a. Can pursue complaint through METRO's internal grievance procedures;
 - b. Can file an administrative complaint with FTA or DOJ;
 - c. Can file a civil lawsuit (attorney's fees included in judgment).
 - d. Lawsuit can include state law violations and request injunctive relief.

36

Community Bridges

CTSA

Consolidated Transportation Services Agency

Legal Requirements



Paratransit Coordination Task Force

October 20, 2004

CTSA

Consolidated Transportation Services Agency

- Statutory authority: CA Government Code Sect.15950-15952
- Intent is to improve transportation through:
 - Combined purchasing = cost savings
 - Adequate training = safety
 - Centralized dispatch = efficient use of vehicles
 - Centralized maintenance = safety, savings
 - Centralized admin = eliminate duplication, improve savings, efficiency

CTSA

Legal Restrictions

- Designated by Regional Transportation Commission in 1980, Community Bridges is the original and sole CTSA in Santa Cruz County
- Eligible for 5310 federal capital grants
 - requires drug testing of drivers
 - Class B driver license required due to vehicle size

Types of Rides

- Elderday Adult Day Health Care
- Medi-Cal/Central Coast Alliance for Health
- Transportation Development Act (TDA)
- Meals on Wheels (MOW)



Elderday

- Transportation availability mandatory
included in Medi-Cal or private pay rate¹
- Eligibility: Medi-Cal determined through Alliance
Private Pay determined by medical referral
- One-way travel not to exceed 1 hour for participant¹
- ADHC is attendance driven
must meet minimum of 4 hours at site
- Driver assists client in and out of home as necessary¹
- Legal custody and control until safely at residence

1. Source: CA Code of Regulations Title 22, Section 78343



Medi-Cal/Alliance

(Central Coast Alliance for Health)

- Transportation based on documented medical necessity, with doctor's written verification¹
- For medical purpose only, medical destinations pre-approved by Alliance¹
- 4 days advance scheduling²
- Restricted to Medi-Cal clients unable to ride other forms of public/private transportation¹
- Must be on time for client appointments
- Medi-Cal eligibility is determined through Alliance

Sources: 1. Alliance contract with CA Dept. of Health Services and CA Code of Regulations Title 22, Section 51323
2. Central Coast Alliance for Health regulations

Transportation Development Act (TDA)

- Funds used for unmet needs for elderly and disabled, as determined by E&DTAC
- Source of funds: Regional Transportation Commission and City of Santa Cruz
- Quarterly reports to RTC

TDA continued

Unfunded transportation needs include:

- Stroke Center
 - » Eligibility: Stroke Center client
- Red Cross
 - » Eligibility: Out of county rides
- Taxi Scrip
 - » Eligibility: Age 60+ or disabled
Low-income \$30 of scrip for \$8 - or - \$15
Waiting list
- Medical Voucher
 - » Eligibility:
Age 60+ or disabled
medical destination
low-income

Meals on Wheels

- Governed by Title IIIB funding through AAA
- Governing codes found in Older Americans Act and Older Californians Act
- Monthly reporting and annual audit with Seniors Council
- Local government funding requires fulfillment of scope of work
- Rides must be on time to support meals program
- Legal custody and control until safely at residence
- Eligibility: Age 60+, destination Meals on Wheels dining center



Thank you!

Transportation Development Act Statutes and California Codes of Regulations



May 2003

ARTICLE 7. CONSOLIDATED TRANSPORTATION SERVICE AGENCIES

6680. DESIGNATION.

Consolidated transportation service agencies shall be designated by the transportation planning agency, except that within the area of the Southern California Association of Governments, they shall be designated by the county transportation commissions and the county of Imperial, and that for the area of the San Diego Metropolitan Transit Development Board, they shall be designated by the Board. The consolidated transportation service agencies shall be designated in accordance with the action plan adopted pursuant to section 15975 of the Government Code.

Each consolidated transportation service agency shall be an entity other than the transportation planning agency and shall be one of the following:

(a) A public agency, including a city, county, operator, any state department or agency, public corporation, or public district, or a joint powers entity created pursuant to Chapter 5 (commencing with section 6500) of Division 7, Title 1, of the Government Code.

(b) A common carrier of persons as defined in section 211 of the Public Utilities Code, engaged in the transportation of persons, as defined in section 208.

(c) A private entity operating under a franchise or license.

(d) A nonprofit corporation organized pursuant to Division 2 (commencing with section 9000) of Title 1 of the Corporations Code.

The transportation planning agency or other designating agency may designate one or more consolidated transportation service agencies. The geographic areas of consolidated transportation service agencies may be overlapping. For the purpose of filing claims, the division of responsibility between designated consolidated transportation service agencies shall be by the transportation service provided (i.e., by geographic area, route, time, clientele, etc.) and not by service function (i.e., operation, maintenance, marketing, etc.). This does not preclude a consolidated transportation service agency from contracting with various contractors to perform different service functions.

The transportation planning agency or other designating agency may rescind the designation of a consolidated transportation service agency if it finds that the agency has failed substantially to comply with the terms of its allocations, with the Act or with the action plan. The rescission of the designation of the consolidated transportation service agency may

be appealed pursuant to Public Utilities Code section 99242 by any claimant, including the consolidated transportation service agency, even where the designating agency is not the transportation planning agency.

Whenever the designation of a consolidated transportation service agency is rescinded or a new agency is designated, other than in the text of the action plan originally submitted, the transportation planning agency or other designating agency shall notify the Department within ten (10) days.

6681. CLAIMANT ELIGIBILITY.

A consolidated transportation service agency may file claims under article 4.5 of the Act for its operating costs, to the extent specified in section 6634(a), and for its costs in purchasing vehicles and communications and data processing equipment, to the extent specified in Section 6634(f). Claims may also be filed by a consolidated transportation service agency for state transit assistance funds as specified in section 6731.1.

A consolidated transportation service agency may provide transportation services itself or contract with one or more other entities to provide service in accordance with section 6683. In either case, the consolidated transportation service agency alone is the claimant for funds under the Act and bears all the responsibilities of a claimant under the Act. These include, but are not limited to, the filing of claims, the maintaining of complete and accurate records in accordance with the uniform system of accounts and records, complying with fare revenue requirements, and the submittal of fiscal and compliance audit reports. The consolidated transportation service agency shall meet all requirements of the Act and these regulations as a single claimant, even where it is responsible for services provided by more than one contractor. For example, the fare revenue requirements shall apply to all of the agency's transportation services jointly, not separately. The consolidated transportation service agency's responsibilities as a claimant may not be delegated or assigned to its contract services providers.

6682. VEHICLES AND EQUIPMENT.

The consolidated transportation service agency may be allocated funds to purchase vehicles and equipment to be used either for transportation services that the agency provides itself or for transportation services provided by a service contractor. In either case, legal title to the vehicles and equipment (other than equipment included in operating cost) shall be vested in the consolidated transportation service agency, if it is a public agency, or in a public agency specified by the transportation planning agency. The consolidated transportation service agency may also be allocated funds to be used as the local match for a grant made for the purchase of vehicles under Section 16(b)(2) of the Urban Mass Transportation Act of 1964, as

amended, provided that the grant is to the consolidated transportation service agency or to an organization under contract to the agency to provide transportation services. Legal title to the vehicles shall be vested in accordance with the requirements of the grant program.

Vehicles and equipment purchased with funds allocated to a consolidated transportation service agency shall be used only for transportation services provided by or under contract to a consolidated transportation service agency.

6683. CONTRACT SERVICE PROVIDERS.

The consolidated transportation service agency may contract with any entity to provide service. The contract shall be awarded on the basis of competitive bidding.

6684. COMPETITIVE BIDDING.

The award of a service contract pursuant to Section 6683 shall be made on the basis of the procurement procedures of the county or other competitive bidding procedures approved by the transportation planning agency.

At a minimum, the opportunity to submit a bid shall be afforded to any entity that has made its availability and interest known to the consolidated transportation service agency.

CALIFORNIA CODES
GOVERNMENT CODE
SECTION 15950-15952

15950. This part shall be known and cited as the "Social Service Transportation Improvement Act."

15951. It is the intent of the Legislature, through the enactment of this part, to improve transportation service required by social service recipients by promoting the consolidation of social service transportation services so that the following benefits may accrue:

(a) Combined purchasing of necessary equipment so that some cost savings through larger number of unit purchases can be realized.

(b) Adequate training of vehicle drivers to insure the safe operation of vehicles. Proper driver training should promote lower insurance costs and encourage use of the service.

(c) Centralized dispatching of vehicles so that efficient use of vehicles results.

(d) Centralized maintenance of vehicles so that adequate and routine vehicle maintenance scheduling is possible.

(e) Centralized administration of various social service transportation programs so that elimination of numerous duplicative and costly administrative organizations can occur. Centralized administration of social service transportation services can provide more efficient and cost effective transportation services permitting social service agencies to respond to specific social needs.

(f) Identification and consolidation of all existing sources of funding for social service transportation services can provide more effective and cost efficient use of scarce resource dollars. Consolidation of categorical program funds can foster eventual elimination of unnecessary and unwarranted program constraints.

15952. (a) Centralized administration of consolidated social service transportation services shall utilize, to the maximum extent possible, existing public and private administrative capabilities and expertise. Utilization of existing administrative capabilities and expertise shall not require employment of those public and private administrative personnel nor shall it preclude any consolidated agency from developing a necessary administrative organization.

(b) Efficient and continual use of all existing sources of funding, utilized prior to the enactment of this part for social service transportation services, shall, to the maximum extent possible, be continued. Social service agencies participating in consolidation or coordination shall continue to maintain funding levels for consolidated services necessary to meet the transportation needs of their social service consumers. Rescinding or eliminating funding for consolidated services by any participating agency shall require cancellation of service to the agency's consumers by the consolidated agency. Cancellation of such service shall not be required if rescission or elimination of funding occurs because of a program change with respect to the source of funding.

(c) Consolidation of social service transportation services shall, to the maximum extent possible, utilize existing agency operating and maintenance personnel and expertise. Effective use of employees of participating agencies shall be achieved without mandating that such employees become directly employed by the designated consolidated agency.

(d) Consolidation of existing social service transportation services shall more appropriately be achieved if local elected

officials are involved in the process. Local elected officials shall, to the maximum extent possible, be involved in the development of the action plans and other local actions necessary for the successful implementation of this part.

CALIFORNIA CODES
GOVERNMENT CODE
SECTION 15955-15958

15955. Unless the context otherwise requires, the provisions of this chapter govern the construction of this part.

15956. "County transportation commission" means such a commission created pursuant to Division 12 (commencing with Section 130000) of the Public Utilities Code.

15957. "Secretary" means the Secretary of the Business, Transportation and Housing Agency.

On and after January 1, 1985, any duty, power, purpose, responsibility, or jurisdiction which is vested by this part in the secretary is hereby transferred to the Director of Transportation. Whenever any reference is made in this part to the secretary, it shall be deemed to be a reference to, and to mean, the Director of Transportation.

15958. "Transportation planning agency" means an entity designated by the secretary pursuant to Section 29532.

For purposes of this part, the Counties of Imperial and Ventura shall serve as the transportation planning agency for their respective jurisdictions. The San Diego Metropolitan Transit Development Board shall serve as the transportation planning agency for its area of jurisdiction.

CALIFORNIA CODES
GOVERNMENT CODE
SECTION 15960

15960. For the purposes of this part, the following agencies, organizations, and programs enumerated in this chapter shall be exempt from consolidation required by this part;

- (a) Vehicles owned and operated by school districts shall be exempt from this part.
- (b) Employees of school districts shall be exempt from this part.

(c) Individual transportation allowances and recipients of such allowances, as defined in Chapter 2 (commencing with Section 11200) of Part 3 of Division 9 of the Welfare and Institutions Code, shall be exempt from this part.

(d) Individual transportation allowances and recipients of such allowances, as defined in Part 5 (commencing with Section 17000) of Division 9 of the Welfare and Institutions Code, shall be exempt from this part.

(e) Individual transportation allowances and recipients of such allowances, as defined in Article 3 (commencing with Section 12550) of Chapter 4 of Part 3 of the Welfare and Institutions Code, shall be exempt from this part.

(f) Individual transportation allowances and recipients of such allowances, as provided under Title XX of the Social Security Act shall be exempt from this part.

CALIFORNIA CODES
GOVERNMENT CODE
SECTION 15970-15971

15970. The requirements of this chapter shall be completed by December 31, 1980, except for the requirements of Section 15972, which shall be completed not later than September 1, 1981.

15971. (a) The Director of Finance shall identify in the proposed budget all state funds that are available for the support of social service transportation services. The director shall also identify, to the maximum extent possible, all federal funds that are available for funding social service transportation services.

(b) The Director of Finance shall request the federal government and appropriate state agencies to ascertain which, if any, categorical funding constraints exist regarding the eventual use of federal or state funds for consolidated social service transportation services.

(c) The Director of Finance shall request all federal and state agencies providing funds for social service transportation services to notify the county transportation commissions and transportation planning agencies of the transportation services provided from funding by the agency.

(d) Funding for these responsibilities of the Director of Finance shall be included in the proposed budget.

CALIFORNIA CODES
GOVERNMENT CODE
SECTION 15980-15984

15980. The Director of Transportation shall be responsible for generally monitoring the implementation of this part . The funds for administration and monitoring of this program by the Director of Transportation shall be funded by funds made available for that purpose from federal funds.

15982. (a) Any social service transportation provider may request an exemption from coordination or consolidation as required under the action plan. The request for exemption shall be submitted to the Director of Transportation, who shall render a decision within 60 days after receiving the request. If the Director of Transportation denies the request, it shall be forwarded to the California Transportation Commission, which shall render a decision within 60 days after receiving it.

The request for exemption shall be granted if, on the basis of information submitted with the request, the Director of Transportation or the commission, as the case may be, finds that the effectiveness of the social transportation service provided the recipients would be impaired by consolidation or coordination.

(b) The Director of Transportation shall adequately inform social service program managers about these requirements well in advance of the deadlines outlined in this section.

(c) The commission shall periodically review, as it deems necessary, the performance of the designated agencies to determine compliance with the action plans and conditions for approval.

15984. The Department of Transportation shall provide technical assistance to paratransit providers who may wish to explore coordination strategies but lack the capability to develop and implement those strategies.

CALIFORNIA CODES
GOVERNMENT CODE
SECTION 15985-15986

15985. Provisions of the Public Utilities Code and orders and regulations of the Public Utilities Commission relating to common carriers of passengers shall not apply to social service transportation delivered by a nonprofit social service transportation provider or to a locally licensed or franchised for-profit transportation provider which operates, in dedicated vehicles, social service transportation pursuant to contract with a nonprofit social service transportation provider organization.

This section does not apply to a nonprofit social service transportation provider that uses one or more vehicles which are designed for carrying more than 16 persons including the driver or that operates vehicles which offer transportation services over regularly scheduled or fixed routes and allows any person to use those transportation services for a fee.

15986. No county, city, or district may impose a special license or fee for social service transportation provided by a nonprofit social service transportation provider organization or by a for-profit transportation provider, operating under local license or franchise, which provides social service transportation pursuant to contract with a nonprofit social service transportation provider organization.

Summary of Consolidated Transportation Service Agency (CTSA) Information

today = 1/18/05

Agency	Area	Service Area Population (square miles)	Structure	Duties	# of vehicles (% W/C securement capacity)	How funded	Comments	Contact Info
Access Services	Los Angeles	11,789,500 (1966)	Private, non-profit Transportation Agency, 67 employees	Provides ADA Paratransit and coordinates/consolidates other paratransit service providers.	470 (51%)	Federal, state and local (Proposition C)		213/270-6082
Amador Regional Transit System	Amador County, City of Sacramento, Rancho Murieta	35,000 (n/a)	Publicly operated transit system, with 19 employees (16 part-time)	Provides deviated fixed-route transit.	12 (9%)	Federal and state		290/223-2877 Patrick Ireland
Clovis Transit/CTSA	City of Clovis and Fresno metropolitan area	81,000 (19)	Publicly operated transit system, with 31 employees (16 part-time)	Operates four fixed-routes and two school routes (M-F), as well as ADA paratransit 7 days per week. After-hour taxi for ADA certified passengers.	24 (3%)	State and local		
CTSA/Pride Industries	Placer County	234,000 (n/a)	Non-profit transportation agency with 35 employees	Provides wide array of transportation services: fixed-route, ADA paratransit, Dial-a-Ride, client transportation, school buses, shuttles and charter services.	40 (1%)	Federal, state and local (also revenue from contracts, maintenance and charters)		916/788-2322 George Sachs
Easy Lift Transportation, Inc.	South Santa Barbara County	180,000 (250)	Non-profit Transportation Agency with 32 employees (12 part-time)	Provides Dial-a-Ride, ADA paratransit, and other CTSA services.	13 (n/a)	Federal, state, and local		805/681-1410
El Dorado County Transit Authority	Western slope of El Dorado County, also Pollock Pines, Placerville, El Dorado, Diamond Springs, Grizzly Flats, El Dorado Hills	102,000 (1527)	Publicly operated transit system with 39 employees (13 part-time)	Provides local deviated fixed-route service, Dial-a-Ride, commuter, and client transportation for local social service programs.	36 (7%)	Federal, state, and local	Special event transportation: county fair, October weekends, and historic Placerville trolley during holiday season	530/642-5383 Mindy Jackson
Fresno County Economic Opportunities Commission/CTSA	All of Fresno County	850,000 (6,000)	Publicly operated transit system with 120 employees (20 part-time)	Operates Headstart school bus, contract transportation for disabled and senior citizens, and Dial-a-Ride fixed route services.	187 (10%)	Federal and state (TDA Article 4.5)		559/486-6594 Gary Joseph
Fresno County Rural Transit Agency	Thirteen rural incorporated cities and 24 rural unincorporated communities	210,070 (6005)	Consolidated Transportation Service Agency (County EOC and Council of Fresno County Governments) with 67 employees (23 part-time)	Provides rural public transit services as 19 coordinated transit subsystems.	58 (>1%)	NA	Service provided Monday through Saturday, and holidays	559/934-8700
Glenn County Transit	Willows, Orland, Hamilton City in Glenn County, and Chico in Butte County	n/a	Publicly operated transit system with 6 employees (3 part-time)	Provides a deviated fixed-route service, subsidized taxi, volunteer medical transportation, and CaWORKS (Ride to Work).	13 (11%)	Federal and state (CaWORKS)		530/934-8700
Inyo Mono Transit Program	All of Inyo and Mono Counties	30,000 (13,170)	Publicly operated transit system with 43 employees (25 part-time)	Provides fixed-route, route deviations, Dial-a-Ride, paratransit, charter, shuttle, and special events services (all in-house through county government).	35 (9%)	Federal and state (AB 437)		760/872-1901
Lake Transit Authority	Lake County	61,300 (1,258)	Publicly operated transit system with (unknown) number of employees	Operates local fixed-route, regional route deviation, intercity bus, Dial-a-Ride, and ADA paratransit.	20 (11%)	Local, state, and federal (Rural Transit System Grant Program)	Also provides contract elderly and disabled transportation services and funding for volunteer driver program.	559/734-2646 Mark Wall

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Summary of Consolidated Transportation Service Agency (CTSA) Information

today = 1/18/05

Agency	Area	Service Area Population (square miles)	Structure	Duties	# of vehicles (% W/C securement capacity)	How funded	Comments	Contact Info
Mendocino Transit Authority	Mendocino County, with two daily routes to Santa Rosa and to Sonoma County	90,000 (3,600)	Publicly operated transit system with 65 employees	Operates three Dial-a-Ride services, local fixed-routes, intercity and intercounty fixed routes, one developmentally-disabled adult route, special event transportation, and charters.	41 (7%)	Local, federal, and state	Contracts with senior centers and also provides welfare to work transportation service.	707/462-5765
Merced County Transit	All of Merced County	205,000 (1,800)	Publicly operated transit system with 6 employees (1 part-time)	Operates both regularly scheduled fixed-route and Dial-a-Ride (door-to-door) transit services.	55 (8%)	Federal and local		209/385-7600
Napa County Transportation Planning Agency	Napa County, Vallejo ferry from Napa	128,100 (400)	Local or regional government agency with 7 employees	Provides administrative oversight of the Vine Fixed Route Transit Service and Vango Paratransit Service in Napa Valley, and planning & coordination w/ other local transit providers in Napa County.	0			707/259-8779
North County Lifeline, Inc.	All of north San Diego County, including Fallbrook, Bonsall, Valley Center, Ramona, and unincorporated area	n/a (1,100)	Human service agency with 36 employees (2 part-time)	Provides ADA paratransit services for the local public transit district.	34 (10%)	Local, state, and federal		760/726-3961 Stacy Zwagers
Paratransit, Inc.	Greater Sacramento County	n/a (400)	Non-profit transportation agency with 217 employees (21 part-time)	Provides door-to-door ADA demand-response and ADA eligible agency subscription transportation, as well as non-ADA shuttle and charter services.	131 (n/a)	Local and federal (includes Sacramento city and county general funds)		916/429-2009 Linda Deavens
Riverside Transit Agency	Western Riverside County	n/a (2,500)	Publicly owned transit system with 380 employees (50 part-time)	Provides fixed-route, ADA paratransit, Dial-a-Ride, route deviation, client transportation, shuttles, and special event services.	268 (6%)	Federal and state		909/565-5124
San Benito Local Transportation Authority	San Benito County (Hollister, San Juan Bautista, Gilroy, and unincorporated Co.)	55,600 (n/a)	Local or regional government agency with 3 employees (2 part-time)	Operates fixed route svc in the City of Hollister, ADA paratransit, on-demand Dial-a-Ride svc outside the fixed route area, interregional svc to commuters and students traveling to Santa Clara Co. (Contracts for these svcs).	24 (n/a)	Federal, state, and local		831/637-7667
San Diego Association of Governments	San Diego	n/a	Regional planning agency, one person assigned CTSA job		n/a			Lydia Callis 619/699-7330
San Diego Rural Bus	Cities of Poway, El Cajon, La Mesa, Santee, Lemon Grove, Coronado, Imperial Beach, National City, Chula Vista, and parts of San Diego County	n/a	Publicly operated transit system with 11 employees (4 part-time)	Contracted services are fixed-route, flex-route, ADA paratransit, Dial-a-Ride, and rural bus. Staff's roles include operations, planning, and contract management.	n/a	Local transportation funds		619/235-2643
Ride-On Transportation	San Luis Obispo	n/a	Non-profit transportation management agency		70	Tri-County Regional Center - TDA - 4.5%		Mark Schaffer 805 541-8747
Easy Lift Transportation	Santa Barbara County	n/a	Non-profit transportation management agency	Provides Dial-a-Ride, ADA paratransit, and other CTSA svcs.	13	Federal, state and local funds. Also local sales tax measures.		

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Summary of Consolidated Transportation Service Agency (CTSA) Information

today = 1/18/05

Agency	Area	Service Area Population (square miles)	Structure	Duties	# of vehicles (% W/C securement capacity)	How funded	Comments	Contact Info
Santa Maria Organization of Transportation Helpers (SMOOTH) since 2000	Northern Santa Barbara County and southern San Luis Obispo County	100,000 (600)	Governed by a board, have an Exec. Director and CTSA Director. Audited by SBCAG	Provides 8 transp services; they consolidate and provide group trips for (mostly) ADA eligible clients and some non ADA clients (senior Dial-a-Ride).	36 (7%)	City Transit TDA funds - less than \$200k transportation contracts	Transit District provides its own ADA Paratransit	Joseph Rye 805/925-0951 or Jim Talbott
Shasta Sr. Nutrition Programs, Inc.	In Shasta County: Anderson, Cottonwood, Happy Valley, Redding, Shasta Lake City, Palo Cedro, Burney, Fall River, and McArthur Park	163,256 (3,850)	Human service agency with 15 employees (7 part-time)	Provides transportation to srs. & disabled individuals w/in Shasta County who are outside local boundaries. Customers phone in 24 hrs. in advance to make reservations. Shared ride and door to door service.	15 (16%)	Federal and local (TDA)		530/226-3060
SunLine Transit Agency	Coachella Valley (Eastern Riverside County)	320,000 (1,120)	Publicly owned transit system with (unknown) number of employees	Provides daily fixed-route (Sun Bus) and paratransit (Sun Dial) services within the Coachella Valley, as well as weekday regional express (Sun Link) service to the Inland Valley	77 (6%)	Federal and state (Measure A)		760/343-3456
Transportation Agency for Monterey County (TAMC)	Monterey County	409,600 (3,324)	Regional government agency with 12 employees	Conducts TDA audits, 5310 workshops; supplies 5311 application assistance, and is the SSTAC lead agency.	0		Actually, they claim that there is no official CTSA designation and that it has no value.	831/775-4412 Walt Allen
Trinity County Planning Department/Transit Division	In Trinity County: Hayfork, Douglas City, Weaverville, and Lewiston	13,000 (3,208)	Publicly owned transit system with 4 employees (2 part-time)	Operates fixed-route, route deviation, and shuttle service.	8 (10%)	Federal, state, and local (also package delivery)		530/623-5438
Yuba-Sutter Transit	Yuba and Sutter Counties, including Marysville, Yuba City, Live Oak, and Wheatland	150,000 (n/a)	Publicly operated transit system (joint powers authority) with 3 employees	provides urban fixed-route, Dial-a-Ride, rural route deviation, and intercity commuter services.	37 (6%)	Federal, state, and local (rentals, Job Access, advertising, and Air Quality District Funds)		530/634-6880

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Attachment 1
Draft Unmet Paratransit/Transit Needs
August 2004

Draft

*The following unmet paratransit/transit needs and proposed actions have been identified by the Elderly & Disabled Transportation Advisory Committee (E/D TAC), the Santa Cruz Metropolitan Transit District (Metro) and its two advisory committees, the Metro Advisory Committee (MAC) and the Metro Accessible Services Transit Forum (MASTF). The source is indicated. **(Needs are not in priority order, E/D TAC recommendations are shown with an asterisk*)**:*

General

- * Expanded publicity necessary about existing specialized transportation services including ADA paratransit, non-ADA paratransit, Medi-Cal rides and mobility training for people to use regular fixed route buses. (E/D TAC)
- * Lack of paratransit and accessible transit connections with neighboring counties — including Monterey (Pajaro), San Benito, Santa Clara and other points north. (E/D TAC)
- * Shortage of transportation services for low-income children and their families, including a lack of transportation for people transitioning from welfare to work. (E/D TAC)
- * Shortage of projected funding to the Transit District for fixed route and ADA Paratransit to meet the needs of the senior and disabled population expected to increase over the next 15 to 30 years. (E/D TAC)
- * Lack of safe travel paths between senior and/or disabled living areas and bus stops (examples: Capitola Road and side streets, trailer park at Antionelli, Pleasant Care facility,). (E/D TAC)

Paratransit/Specialized Transportation

- * Shortage of programs and operating funds for 'same day' medical trips on paratransit. (E/D TAC)
- * Shortage of programs and operating funds for 'same day' non-medical trips (E/D TAC)

- * Shortage of volunteer drivers in Santa Cruz County including for the Volunteer Center Transportation Program and the American Red Cross out-of-county medical ride program, particularly in south county. (E/D TAC)
- * Shortage of affordable special care trips and gurney vehicles for medically fragile individuals and those needing “bed to bed” transportation. (E/D TAC)
- * Current shortage of specialized transportation rides throughout the community due to funding constraints. (E/D TAC)
- * Shortage of projected funding for ADA and non-ADA Paratransit to meet the needs of the senior population expected to increase over the next 15 to 30 years. (E/D TAC)
- * Lack of specialized transportation for areas outside the ADA Paratransit service area (E/D TAC, MASTF)
- * Shortage of availability of Taxi Scrip. (E/D TAC)
- * Additional transportation needed for the Watsonville Senior Center. (E/D TAC)
- * Additional transportation needed for the Live Oak Senior Center (E/D TAC)
- * Additional transportation needed for the Highlands Senior Center (E/D TAC)
- * Need for coordinated and seamless-to-the-public system of specialized transportation with central information point. (E/D TAC)
- * Need for the Consolidated Transportation Services Agency to acquire an improved operations and maintenance facility. (E/D TAC)
- * Ongoing attempts should be made to provide ADA Paratransit certification at group facilities. (E/D TAC)

Draft

Transit

- * Need to prioritize bus shelter replacement based on high usage by seniors and people with disabilities. (E/D TAC)

- * Continued need for transit to unserved housing areas in south county (examples: Stonecreek Apartments in downtown Watsonville and the San Andreas Migrant Labor Camp). (E/D TAC)
- 15-minute frequencies and expanded window of service on Highway 17/Amtrak service (Metro, MAC)
- Extension of Highway 17/Amtrak service to UCSC at key times (Metro)
- 30-minute peak frequencies on collector and arterial routes (Metro, MAC)
- Bi-directional service on local Watsonville routes (Metro, MAC)
- Expanded service to new residential and commercial areas in Watsonville (Metro)
- Service to new Watsonville High School (Metro, MAC)
- Increased frequency of service to Scotts Valley High School (Metro)
- Expanded service/increased frequency of service for UCSC (Metro, MAC)
- East/West Express service to UCSC and Cabrillo (Metro, MAC)
- Express service between Cabrillo-Aptos campus and Cabrillo-Watsonville campus (Metro)
- Minimum frequency standard of 60 minutes (Metro)
- Express service between San Lorenzo Valley and both UCSC and Cabrillo (Metro, MAC)
- * Holiday service on all holidays (Metro, MASTF)
- Expanded service between UCSC and Westside University activity centers such as Long Marine Lab, Wrigley building offices, Texas Instruments building offices (Metro)
- Expanded window of service on major collector and arterial service (Metro, MAC)

Draft

- Service from Santa Cruz County to Los Gatos (MAC)
- “Bona Fide” express service connecting the four transit centers in Santa Cruz County together (MAC)
- * Service to Independent Square in Watsonville (MAC)
- * Service to the Santa Cruz County Fairgrounds in Watsonville (MAC)
- Service from the UC Inn to UCSC (MAC)
- Expanded evening and late night service on major fixed routes to improve service accessibility (MAC)
- Expanded bicycle capacity and access on the fixed route system (MAC)
- Reduce the cash fare while preserving the pass charges so that the average fare using a pass is a higher percentage of the cash fare than currently exists (MAC)
- Establish a means-tested low income fare (MAC)
- * Restoration of lost fixed route service (Metro, MASTF)
- * Upgrading head-signs on buses so that all head-signs are of the same level of legibility as those most recently purchased (MASTF)
- * Bus stops and bus routing in front of all senior and disabled trip generators (MASTF)
- * More ADA compliant bus stop improvements, including benches, shelters, and lighting (MASTF)
- * Braille and raised numbers on bus signage at bus stops indicating which bus routes are being offered at each stop (MASTF)
- Expansion of Highway 17/AMTRAK Service to Watsonville (Metro)
- Bus Rapid Transit Service (Metro)
- Express routes throughout the service area (Metro)

Draft

- Direct service to Santa Cruz on Portola (Metro)
- Fare free service to students under the age of 13 (Metro)
- Increased peak hour frequencies on routes between Watsonville and Mid-County (Metro)
- Increased service frequencies throughout the system (Metro)

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Draft

Paratransit Demographics

September 15, 2004

A presentation to the Paratransit Coordination Task Force

Pat Spence

Member, Board of Directors,
Santa Cruz Metro

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Paul Marcelin-Sampson

Founder, The Metro Riders Union
La Unión de Los Pasajeros

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Approach

1. Identify the population
2. Review recent population data
3. Review population projections
4. Use 2 and 3 to make predictions

Note: Figures cover Santa Cruz County,
unless otherwise stated.

ParaCruz = good barometer

- **Largest paratransit program in county**
- **Ability-based (necessity) certification**
- **No capacity constraints**
- **No trip purpose restrictions**
- **Mirrors conventional bus network, so geared to dominant travel patterns**

Age helps predict ParaCruz registration

- **Of people age 65 and over, 9.2% are ParaCruz clients**
- **Of people under age 65, 0.4% are ParaCruz clients**

Data sources: Metro (ParaCruz registration by age), Census Bureau (population by age). Results approximate.

The over-65 population declined from 1990 to 2000

<u>Year</u>	<u>All People</u>	<u>People 65+</u>	<u>Share</u>
1990	229,700	25,900	11.3%
2000	255,600	25,500	10.0%

Data source: Census Bureau.

Proportion of people over 65 begins to rise in 2010

<u>Year</u>	<u>Share</u>	<u>Year</u>	<u>Share</u>
2000	10.0%	2030	21.1%
2010	11.2%	2040	21.2%
2020	17.4%	2050	20.8%

Data sources: Census Bureau (baseline population),
CA Dept of Finance (population projections).

Projected 65+ population

<u>Year</u>	<u>People 65+</u>	<u>Year</u>	<u>People 65+</u>
2000	25,500	2030	62,100
2010	30,300	2040	62,200
2020	49,700	2050	60,900

Data sources: Census Bureau (baseline population),
CA Dept of Finance (population projections).

Pointers to Data Sources

Census <http://factfinder.census.gov/>
(Select "Data Sets" and then "Detailed Tables". "Census 2000 Summary File 1" should be selected. Now, set the "Geographic type" to "County", drill down from the State of California to the County of Santa Cruz, and click "Add".)

Dept of Finance http://www.dof.ca.gov/HTML/DEMOGRAP/DRU_Publications/Projections/P3/P3.htm
(Select Santa Cruz.)

Now we can project the number of clients

Projected population (From the California Department of Finance)	×	ParaCruz registration rate (From Metro and the Census Bureau)
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In fact, the calculation is much more detailed

- **Each age group (5 years)
is considered separately**
Of people over age 85, 25% are ParaCruz clients;
of people age 80 to 84, 15% are clients; and so on...
- **Men and women
are considered separately**
Overall, men are half as likely to be clients.

Our projections for ParaCruz

Year	Clients	Change
2004	3,250	n/a
2010	3,740	+ 490
2020	4,430	+ 690
2030	5,920	+ 1,490
2040	6,930	+ 1,010
2050	6,700	– 230

Figures not reviewed by Metro.

Specialized Transportation Programs Implemented in Other Areas

6/9/2004

	Category	Programs	Description
Los Angeles - Access Services	Mobility Maximizer	Travel Planning/ Orientation	Eligibility Specialists evaluate applicants, offer informed choices/resources, provide personalized travel itineraries
(funded in part by local Prop C		Transit Independence/ Free To Go	Seminars to familiarize those with special needs about accessible transportation options. Offers free passes, demonstrations of accessible transit, personalized trip itinerary and travel buddy Partnered with Easter Seals. Attempts to channel E/D rides in 10:00 am to 2:00 pm time frame.
Discretionary Sales Tax)		Standardized fares throughout service area	Free fare for ADA-eligible patrons and assistants. Requires coordination of fixed route services to cater to needs of ADA eligible that can use these services.
		Regional Eligibility	Universal service eligibility program to remove service restrictions and limitations created by multiple client/eligibility requirements of varying entities.
	Access Information and Referral Services	RideInfo	Telephone referral service providing quick, accurate referrals to public and private specialized transportation providers, as well as human services
		Directory of Specialized Transp. (Grey Book)	Extensive database of public, social service, medical and commercial organizations offering transp. Services or assistance. Includes easy to use color maps, reference guides, info for adjacent counties, reservation requirements, eligibility info & web sites.
		Web Site Referrals	Info via the internet, plus links to other sites
	Access Education and Training Programs	Transit/Paratransit Management Certificate Program	University-based program to train agency staff
		CTSA Scholarships	Assists transportation providers to develop management skills and participation in service networks.
		Technical Training Workshops	Effort to bring nationally recognized training opportunities to the area

	Category	Programs	Description
	Coordinated Mobility Training	Info Clearinghouse and Technical Assistance	Provide resource library, technical workshops, publications, conference planning, announcements, committee involvement and Section 5310 help.
		Service Coordination Agreements	Three coordination models proposed: 1. User side subsidies to offer incentives to eligible (ADA) paratransit users to divert demand to a different service provider, 2. Direct operations to authorize an agency to deliver trips which would otherwise be provided by Access Paratransit, 3. Group Sub- Contracting to purchase services on a cost basis depending on availability of excess capacity
Riverside		TRIP	Riders recruit and pay their own drivers who are reimbursed by TRIP @ IRS rate/mile. Associated with RSVP program. Some drivers donate \$ to charity. 17 organizations participate in Volunteer Driver Corps incl residential centers, churches, social service agencies. Referrals only, no advertising.
Sacramento - Paratransit Inc.		Accessible Services Guidebook	Comprehensive information regarding accessible transportation services
		Mobility Training	Program offers training to people learning to ride buses and light rail focusing on: lower costs and more independence and flexibility. Offered at senior residence/activity centers. Funded by Measure A. Promotes use of free transit for ADA pass holders. Adult Day Health Care Centers have a cost sharing agreement and train people to use deviated neighborhood fixed routes.
		Free Lifetime Bus Pass	Free transit pass for people 80 or older, travel training, trip planning, stop announcements and priority seating
		Ride Derivated fixed routes	Offers 17 neighborhood service areas. Smaller vehicles drive a route, but can derivate 3/4 mile off route. Scheduled a day in advance. Only time for one deviation every half hour. Paratransit and Regional Transit agencies coordinate to provide service.
		Shared Cost Contracts	Work with agencies needing groups of rides to: make vehicles available, train drivers from the agencies, pay vehicle insurance cost (included in agency vehicle insurance and reimbursed by Paratransit Inc) and pay fuel costs.
		Shuttle Programs	TMA contracted with Paratransit company to provide rides in an area.

Category	Programs	Description
Metropolitan Transportation Commission (incl.24 ADA operators)	Senior's on the Go (Santa Rosa)	Marketing campaign for 65+ people for one week annually including free access, incentives, Riding Tips brochure. Increased S/D ridership on bus 60% for promo week. Bus Buddy program trains senior trainers (2-3 hours) who in turn train others. Program provides shopping carts to senior centers for shared use. Tailored fixed route bus service for heavily traveled paratransit routes using low floor, small buses that serve front door of senior complex. Added amenities on small buses like coolers to accommodate frozen food.
	Santa Rosa	Put ADA contract out to bid: decreased costs, provided new same-day service. Used Paratransit user committee to help spread word that no-shows cost.
	Transit Ambassadors (Napa County)	Personalized orientation and "travel buddy" services by trained volunteers. Volunteers receive 4 hours classroom training and free bus pass, and agree to spend at least 8 hours/month as an ambassador either at the transit center, riding the bus and/or providing 1-on-1 help. Ambassadors meet 6X per year incl xmas luncheon and summer picnic.
	Local Shuttles/ Circulators	Operate during non peak periods connecting housing with amenities. Some services coordinate needs of commuters, children and seniors (non-drivers).
	ADA Cost Sharing	Bay Area operators developed a cost sharing agreement with SF to cover the portion of trips that exceed their mandated ADA paratransit service area
	Faith in Motion (Oakland)	Eight religious congregations make a van available on a fee basis using volunteer drivers for groups as a community building endeavor
	Community Services Agency (Mountain View/ Los Altos)	Volunteers, coordinated by geriatric case managers, provide escort/shopping assistance, use their own vehicles or escort on paratransit and are recruited with public service announcements in newspapers
	Discounted Taxi Scrip (various SF Bay cities)	Richmond - \$10 for \$30 of taxi scrip, can purchase 3 sets/month; Emeryville - \$1 for a \$5 discount off taximeter; Albany - reimburses 80% of total cost; Berkley - \$1-5 for \$10 of taxi scrip, baseline of # of scrip books established per need/income
	Accessible Taxi (SF)	ADA riders call any of 13 taxi operators & pay using 90% discounted scrip. City owns some ramp vehicles which is leases to taxi companies who are required to participate in training and handle an average of 3 wheelchair service calls per shift.
	San Mateo (SamTrans)	Switched from non-profit CTSA to for profit company to provide ADA. Projected to save \$200,000/year. Planned new service not well received in the community. Developed a pre-screening brochure that lists options, qualification/eligibility to "get the right service for the user." Allow riders to negotiate rides by reservationists giving top three trapeeze options. Drivers call customers 10 minutes before vehicle arrives using MVT/GPS/AVL. Contract out for mobility training that (by diverting riders to fixed route) more than pays for the cost of training.

	Category	Programs	Description
San Diego - STRIDE		Web Info	Users or social workers specify origin and destination then chose from list of 23 types of service they may need (door-to-door, medical, wheelchair lifts, etc.) Services suggested that meet needs or people can browse 150 participating programs. Maintained by the CTSA (SANDAG)
Orange County (OoA)		Enhanced Info & Referral	Office on Aging dedicates a substantial portion of its Tobacco Settlement Revenue to a "one-stop" info/outreach program to inform seniors of avail transport options. Staff of 6 handles 2,500 calls/month, 1/3 of which are transp.
Portland, Maine	Business Support	Ride & Shop	Businesses contribute \$1.50 toward cost of transport for each customer. Collected by annual dues then debited.
		Healthy Miles	Per trip contribution by health care providers similar to typical cost of parking validation
Reno, Nevada	Foundation Support	CitiCare	Group of citizens founded a non-profit --comprised of government, private businesses, foundations, individuals --to bridge specialized transport funding gap. Donations tax-deductible
Portland, Oregon		Ride Connection	Coordinates transportation by community-based organizations (30 agencies) and volunteers. Many volunteers use their own vehicles
Lane County, Oregon		Coordinated ADA Paratransit	Volunteers reduce cost by providing rides in their own vehicles, escort services from door to curb-to-curb ADA service for medical rides only and rides outside the service area
National (AARP, Contra Costa)		Driver Safety Program	For seniors and families: how to maintain mobility with sacrificing safety, tips for compensating for effects of aging, defensive driving training, exercises for older drivers, self-assessment, resource worksheet to identify alternatives and costs
Project Action		Mobility Plan	Assists communities develop assess options, develop mobility plans and conduct sensitivity training

**Presentations by
Paratransit Inc., Sacramento, CA
to the Paratransit Coordination Task Force
Santa Cruz, June 16, 2004**

Guest Presenter:

Bill Durant, Executive Director, Paratransit, Inc.

General Agency Information:

- Paratransit, Inc. (PI) is the CTSA (Consolidated Transportation Services Agency) for the Sacramento area, similar to the role of Community Bridges here in Santa Cruz County.
- Their annual budget is \$10-11 million.
- They are a 501c-3 non-profit organization.
- They provide or support the delivery of about 800,500 paratransit rides per year.
- They provide direct services and operate a maintenance facility that serves 20 agencies and 400 vehicles. The maintenance facility is their version of a "bake sale" (i.e. a profit center that generates revenue, but not yet enough to pay taxes).
- Their entire system is fully automated. They have mobile data computers and antennae on board all vehicles for GPS and GIS. The software they use is called PASS – a product of Trapeze Software, the industry standard for automated scheduling.
- PI started in 1978 by a group of community organizers who developed a concept paper on how human service transportation could be coordinated and at the same time provide accessible transportation for people who aren't necessarily associated with human service organizations. They wanted to serve people who didn't go to a meals program, weren't involved in the disability rights movement or activities designed for people with disabilities, but were in the community and needed to be able to move around in order to survive.
- Initial organizers secured \$300,000 in operating funds from the transit district to begin service and negotiated the use of two vans owned by the community college district. Service was provided to the community college district disabled students; the rest of the time the same vehicles were used to provide paratransit service to people in the broader community.

Service Characteristics:

- Their system has no restrictions. ADA service is provided by PI. In addition, half of the rides delivered are provided by human service agencies.

- PI is purposely segregated from the fixed route system, although the goal is become more integrated. PI's position is that it's time for public transit agencies to begin to shift their paradigm and become the creators/managers of useable transportation, including use of all mobility tools (taxicabs and paratransit). This can be accomplished by: providing different services; using small buses or paratransit vehicles to provide some level of service by day of week and time of day; using different community resources; and grouping all types of riders on the same vehicle. So "those who are temporarily able bodied don't become culturally deprived because they can't ride on a bus with someone who's 100 years old."
- Question: You said that integration is one of the center pieces of your philosophy. In looking at our matrix of all these services here in Santa Cruz and focusing especially on eligibility, I'd like to know what you do in Sacramento to help the consumer, in the easiest way possible, look at their own eligibility, their own needs for flexibility and type of ride frequency and then find the most cost-effective best method? Do you have a centralized method? From a consumer's perspective how does that work?

Answer: Mr. Durant answered that by training he is a social worker. He feels that the whole eligibility process is ineffective. He questioned how many of the meeting attendees ride the bus. He questioned how many people would lie, cheat and steal to get on the bus and if there is a service that people are going to lie, cheat and steal to use, then there should be more of it, not less of it. The focus shouldn't be keeping people off the system, but rather should be getting people on the system. His feeling is let's make everyone eligible, get that off the table and put the money into service. PI used to do ADA eligibility, but gave it back to the transit district. However, they think there remains an issue with the way Regional Transit District (RTD) is doing eligibility. PI feels that the really important component that is missing is "orientation to the system", not eligibility. People are calling up who have no orientation to the service and who think that PI is a taxicab company, which they are not.

- Question: In trying to use paratransit to go to work, the issue of timing arises. For example, if a person is on time for her ride, but another person sharing the ride with her is 10-15 minutes late, the first person then arrives late to work. Does PI have this problem and how do they handle this situation? Does the person going to work have priority over the other person?

Answer: That's an issue. There are some regulations under the ADA that are difficult to deal with when you have people going to work or you have people that are developmentally disabled people where dealing with change is difficult for them. PI allows their drivers to wait 5 minutes or a little longer if they think the passenger is going to make it. They try and protect the rider's time. It's difficult enough to get people to work on time given that the freeway can become a parking lot with one accident, without people being late for their ride. In terms of rider priority, PI tries to get riders to their destinations on time and tries to get there at the same time every day for subscription riders. If a client is calling in every day, that just adds to the frustration. Those are the kinds of issues that need to be worked out as a community in terms of how to handle specific situations. How is the best way to provide that regular ride at the time when someone needs to be there and at the same time provide a shared ride system. Part of it is having people be more conscious not just of themselves, but

of other riders. "This really is the family car and families (recognize) the fact that people can't always be picked up at the same time and we have to deal with that."

- Question: In terms of providing same day trips does PI have a taxi scrip program? How do you fill that gap in the system in terms of meeting people with emergency same day needs?

Answer: PI does same day service and would like to move to real time scheduling. For example, a person could call 3 hours in advance and get a ride. The idea is to get as close to real time as possible so that the decision-making time for public transit service is fairly close to what you can get in your car. Mr. Durant believes that people who don't drive cars should have that kind of service. Funding may be available through a variety of funding sources.

Program Characteristics:

- PI pools its money with human service providers' funds to keep them in business. There's no way the ADA Paratransit program funded by the Sacramento Regional Transit Agency (RTD) could cover the 400,000 rides currently being provided by human service agencies. So it's also in the RTD's interest to work cooperatively and keep those agencies in business.
- Paratransit Inc. provides the human service agencies with vehicles and pays for their insurance, maintenance, fuel and driver training. The agencies provide and pay the drivers and do their own scheduling. PI will provide technical assistance if the agencies want and need it. Their contracts are simple, although each one is different. The agencies define what their interests are. If their interests coincide with PI's interests then they have the basis for doing business.

Mobility Training

- In the spirit of more integration, PI provides mobility training. Last year they trained 629 people successfully to ride the fixed route bus and light rail and calculated savings to the transit district of \$1.4 million. If all of these bus riders took paratransit rides instead, the cost would have been \$1.8 million. PI is trying to make sure that their public transit system serves everyone, not just commuters.
- When Mobility Training started in 1983, PI would help people learn to go wherever they wanted to go (no trip priorities) since their feeling was that wherever people were going was an important trip to that individual.

ADA and Other Paratransit Trip Coordination

- PI is currently providing ADA paratransit transportation for the Sacramento Regional Transit District. It's an expensive service and PI is trying to convince the transit agency to redesign some of the non-productive fixed route service into an integrated system that would provide a level of mobility for everyone in that community. PI is not a replacement for fixed route service, but a complement to it.

- Question: Can you provide a breakdown and associated costs for: 1) strict ADA paratransit trips - within the minimum service area prescribed by law 2) premium trips - outside the service area or at times when there's no fixed route service and 3) social service rides – including the relationships with other agencies that you're providing trips for?

Answer:

ADA Service - The regional transit agency (RTD) pays PI about 45% of the cost to provide service, about \$7-8 million annually. Pure paratransit service costs about \$55-60/hr. In this case the public transit agency is being subsidized by a non-profit. It would be difficult for the RTD to find another contractor who would come up with the other 55% of the cost. PI sees relationship as collaborative.

Agency Service – PI pays an out-of-pocket expense of \$15/hr for this service, far less than the \$55-60/hr cost to provide ADA paratransit. PI gives agencies credit for their in-kind contributions. Agencies provide and pay the driver's wages. PI trains the driver and gets him/her licensed. They also make the driver part of PI's drug screen and pull-notice program so they can keep track of their driver. A little less than half (45%) of the 800,500 trips they provide are of this type. The idea is that by providing and stabilizing human service transportation, it is recognized as a valuable part of the public transit system. It is also important for the public transit agency to realize that if the social service agencies stopped providing rides tomorrow, there would be no way to deal with the increased demand for ADA rides (agency clientele is about 80% ADA eligible). That would then be 400,000 additional trips that would then be calling the ADA call center and in Sacramento, the transit agency is in no position to deal with that. Also, this allows PI to provide subscription service outside of the ADA where there's a limit that only half of the trips can be subscription service. When they are included in to the entire system, productivity goes up. In a pure paratransit ADA system, the best Mr. Durant has ever seen is serving 2 people per hour. The productivity of Paratransit Inc is almost 3 rides per hour. So they are able to do a lot of things by supporting and recognizing the value of what human service agencies are doing. At a cost of \$15/hour, a person could barely afford to operate their own car. All are shared ride systems and contracts have productivity standards that they're expected to meet.

Other Services - PI provides services supported separately through funding generated through their maintenance shop and other activities. Mobility training is about 85% self supporting.

- Question: Could you provide more clarification about the relationship between PI and the social service providers? You provide the vehicle and agencies provide the driver.

Answer: PI pays for some or all of the following: maintenance, fuel, insurance and driver training.

- Question: Does PI interact with the Medi-Cal managed care plans, and if so, what portion do these trips account for?

Answer: PI is not a Medi-Cal provider, but would like to be. No one in Sacramento County can tell PI how much is being spent on transportation through Medi-Cal. There have been times when the regional Medi-Cal office has told clients that they don't do non-emergency medical transportation and to take paratransit instead. The problem is that demand always outstrips the ability to supply services. PI has had to go to legislators and tell them that they can't continue doing providing certain types of transportation. For example, dialysis is a growing industry in the community. In 1978, there were 4 dialysis units, now there are about 25.

- Question: Could you review how much the transit district supplies of your budget? Does that 100% cover the ADA rides? Who monitors ADA compliance?

Answer: About 45-50% of PI budget comes from the transit district. This doesn't cover all of the cost of the ADA rides. ADA compliance is monitored by transit district as they are the agency responsible by law. They have conducted FTA compliance audits and thus far everything is in conformance with federal laws, no one has been sued.

- Question: One of the reasons that the Metro's ADA Program will not allow anyone other than the ADA passenger to ride the vehicle is because they are concerned that if someone else is on the vehicle, then the transit district is subsidizing the social service program instead of transporting their ADA Paratransit individuals and that the ADA passengers have to suffer because someone else is on board. Is that an issue in Sacramento?

Answer: PI doesn't worry about it. Mr. Durant expressed confusion about why anyone wouldn't want to get as many people on the vehicle, since it's out there anyway. PI has identified 10 agencies that are also providing services to people who are eligible under the ADA. If they didn't provide the service, the regional transit district would have to provide the service and it would be much more expensive.

- Question: Regarding coordination issues and referrals, an attempt was made to request a Medi-Cal ride from PI. The caller was told that PI doesn't provide Medi-Cal rides, but no referral was given. The questioner is hearing that we have problems here in Santa Cruz with our patchwork of programs, but it seems to him that it's no different in Sacramento.

Answer: Essentially, PI used to make up a list of other agencies that do Medi-Cal rides, now there are too many. However, if a person is eligible for service, PI will make the trip. Medi-Cal eligibility is not a question that PI would ask someone if they called for a ride.

Neighborhood/Community Transit

- PI operates some "community transit service" where rides can deviate from fixed routes to communities within Sacramento not well served by public transit. PI organized Mobility Committees in these neighborhoods. Residents got involved, were able to secure TEA-21 funds to set up community transit systems and were able to have an impact on how the routes were structured. Because PI already had the real time technology, they set up fixed routes using 24' paratransit vehicles that were able to deviate from a fixed route by $\frac{3}{4}$ of a mile and provide door-to-door service.

- Initially there were two demonstration projects and currently there are eleven neighborhood routes. Every community in Sacramento County would like to have one. They go throughout the neighborhood, tie into major bus lines and they deviate providing door-to-door service from a residence or senior center. This flexibility alleviates the difficulty of a bus dropping people off at a mall and riders then having to walk across the parking lot to get to the entrance. All vehicles providing this service are accessible.
- PI has also partnered with a local Transportation Management Association (TMA) to provide community transit in a developing neighborhood. Subscription type service is provided during the peak period for people to get to and from work. In the off peak period, they provide real-time, demand-responsive door-to-door service. In addition, door-to-door links are provided to the regional transit system bus or light rail stops enabling people to go anywhere in the community served by transit. Service is provided in real time. From the time a phone call is placed, PI guarantees to pick up clients within 15 minutes. Shared rides are used as much as possible. As the universe of riders grows, the opportunity for shared rides increases.
- PI thinks this model would work in a lot of communities where neighborhoods are well-defined and where amenities are available that support neighborhoods. Because many of the trips that people want to make are within their own community, the system has both senior citizens and young people being sent to the store by their parent on the same buses. PI sees buses as kiosks running through the neighborhood where notices can be posted to sell refrigerators, find a babysitters, find homes for puppies, or take in wash, for example. "The bus becomes the new front porch; it's how you meet your neighbors. It becomes a whole new set of eyes and it's got radio contact so you can provide a level of security that wasn't there before. In some neighborhoods that's really important."

Labor Issues:

- PI has been a union shop since 1981 and is currently an Amalgamated Transit Union (ATU) property. Even being a union shop, PI and other operators can provide service at a lower cost than the transit district. PI believes that we need to start making the best possible use of the technology that's available. We can create systems that are reflective of the communities we live in.
- PI can provide service in communities that, because of the densities or the way they're constructed, are not good for fixed route service. They can provide service in those types of settings to connect people to fixed route service. The travel time getting from one community to another can be cut if that service is reallocated rather than meandering through suburban communities.
- Question: If the agency hires the drivers that are trained by PI, what is the relationship between the agency drivers and those that work specifically for PI? All they all part of the same union? Do they coordinate with each other or are they totally separate?

Answer: All drivers are part of the Sacramento Mobility Coalition. For example, PI will coordinate with human service agencies when they receive a request from a nursing home to do a group trip such as lunch downtown. PI may not be able to do that trip themselves. However, since they know that a certain agency doesn't use their vehicles during the hours needed, they make a deal with the agency with the vehicle to do the trip for PI at a negotiated price.

- Question: You said that the agencies that collaborate with you use non-union labor. The contract between Community Bridges/Lift Line and UTU forbids this practice. Was there union opposition to this and how did you overcome it? Also, who represents the fixed route drivers?

Answer: PI is aware that they are the agency charged with managing the paratransit system, not the union Amalgamated Transit Union (ATU). PI understands that the ATU has the responsibility of doing what's in the interest of the rank and file. The ability to contract out service is critical to the job PI is charged with doing and they make that clear to the ATU. It's a collective bargaining process so you give a little, you get a little. PI makes sure that they have a contract that still allows them to manage their system. The same ATU local represents the fixed route drivers as well.

- Question: There is no labor savings in driving a smaller vehicle since what drivers are paid is not a function of the size vehicle they drive. How did you address that?

Answer: The driver cost dictates the hourly cost of the service. The most expensive piece of the trip is the driver. Some properties have a dual wage system. PI pays less for specialized transportation drivers than fixed route transit drivers. However, it's important to understand this from a historical perspective. The wages that are being paid to fixed route drivers, come from a time in the early 70's when transit districts were awash in funding from the Transportation Development Act. Local service was run by people that were very smart and they were able to take advantage of the availability of that money. Unions did a good job in getting some of that money for their members. There isn't anyone who's awash in money now, so there is a need to bargain from a different perspective.

Funding:

- PI currently receives 1.8% of revenues generated by a local sales tax. A November 2004 ballot measure proposes to increase that amount to 4.5% of the revenues raised.
- PI works to help build a constituency for public transit. If public transit is going to thrive and survive in Sacramento, it needs a constituency. PI takes this on and participates in how Sacramento presents its public transit product.
- Question: PI receives \$7 million annually from the transit agency. What percentage of the transit agency's overall budget is that?

Answer: Of the transit district's \$100 million budget, it's about 7%. PI's board is committed to the ADA and to making the promises of the ADA a reality. PI is very aggressive about

being an advocate for opportunities to create partnerships for an integrated public transit system (rather than just for more money for a segregated paratransit system).

- Question: With all of the merged funding sources to make the system more efficient, how do you satisfy your funders that you're not using their money to transport someone who is not one of their clients?

Answer: PI stopped asking for funds from the Area Agency because they wanted too much documentation which drove up costs. PI let the nutrition programs go after that funding. PI will then subcontract with the social service agencies. The program that gets the most varied funding is the Mobility Options. They get funds from the Regional Center, community service block grants, regional transit funding and they handle that within their program. Most of it is computerized.

- Another issue is that sales tax money in Sacramento is designated specifically for transportation for elderly *and* disabled. Elderly is defined as 75 or older. A lot of people that are ADA eligible are not being defined as ADA, they are being defined by age and that's all being handled through the mail.
- Question: Can you clarify the amount of sales tax that PI receives?

Answer: After the money comes off the top of the sales tax, PI gets 1.8% of what's left. What this means in terms of real dollars is about \$1.6 million/year. This is a fairly stable source of revenue although it has the ability to grow if people buy more refrigerators and cars.

- Question: How are the neighborhood rides funded and how do they relate to fixed routes? How many of these neighborhood transits are there? And are they accessible?

Answer: Initially they were funded through a TEA 21 federal grant to Sacramento County. Federal dollars were matched with a coalition of paratransit, advocacy groups like the Commission on Aging for Sacramento County and Department of Human Assistance who had welfare to work money. Those operating now are exclusively funded through the regional transit district because the communities are asking for this type of service. The regional transportation provider is working to upgrade their technology so can go real time (without 24 hours in advance scheduling).

Eligibility/Orientation

- PI has discussed an idea to develop something like a credit card or other identification mechanism for people that would store the types of transportation options available specifically to them. Once eligible, a person could call PI and they would do an orientation over the phone on all the services that person can use and connect clients to mobility options/training. What's missing in Sacramento, and he suspects here as well, is a lack of understanding by clients about what's out there or how to get it. He sees this as a problem associated with eligibility, which is handled mostly through the mail without seeing people.

- From PI's perspective, it's all about the orientation. The goal is to cut down the time their call takers are on the telephone so that every time someone calls for a ride, they don't need to teach them how to use the system.

Guest Presenter:

Kevin Welch, Mobility Training Coordinator, Paratransit, Inc.

General:

- During Kevin's 9 months in 1987 developing a Mobility Training Program for Santa Cruz Metro, surveys were taken to assess the community's needs and about 50 people were trained in 4 months. Community outreach is big factor in the success of mobility training.
- PI's Kevin Walsh was in Santa Cruz County for 9 months in 1987 during which time he developed the mobility training program for Santa Cruz Metro. He was thrilled to see that the brochure he produced is still in use. However, he expressed concern that he hasn't heard much about mobility training at the Task Force meeting and wondered whether it was still happening and viable. METRO said that they trained 30 people in the past year.

Program Information:

- In Sacramento, PI has 6 full time mobility trainers who go out in the community every day training seniors and people with disabilities. The annual budget for Mobility Training is \$50,000. Trainees are referred from a wide variety of sources. Community outreach is a key component of the Mobility Training Program. Kevin's job is to visit the senior centers and residential facilities to get the word out about mobility training. He also works with the transit district to have them publicize the mobility training program. Recently, a new policy was adopted by the transit district that everyone 75 years or older is entitled to a lifetime bus pass so they'll never pay for public transit again. This is a real enticement for seniors to get comfortable riding fixed route service and helps reduce the need /cost for ADA paratransit.
- PI and the Sacramento RTD are trying to create "bus riders for life." When faced with the option of using the free lifetime bus pass vs. paying \$6 to ride paratransit, seniors usually choose the free public transit option. When seniors start using the transit system, they notice the beauty parlors and bakeries that they can get to by bus. PI has found that there are two main reasons people don't take the bus 1) they rely on family and friends for rides and 2) or just don't know how. PI also arranges senior group trip training where they will take 10-15 people out on an initial bus experience trip. If there is interest, PI will follow up with one-on-one or up to three-on-one training. Out of the 8,560 people trained since the program's inception 4,040 were seniors, the rest were developmentally and physically disabled individuals.
- PI's trainees are taught how to use the bus, how to make transfers, how to travel the streets safely, and how to advocate for their mobility needs. They are advised about what they are entitled to when using public transit, and about how to communicate their needs to bus drivers.

- Statistics for mobility training 2002-2003: Cost avoidance of \$1.4 million annually to transit; 629 people successfully trained. About 84-90% of the people trained continued to ride transit 3 months later.
- Trainers have found that they can go into a center and find a senior who is interested in acting as a mobility training organizer for the entire community. One example is Trudy who is almost 90. She approached them to come into the facility where she lived because she observed neighbors pulling out of the parking lot and almost getting hit. Since the time Trudy contacted them a year and a half ago, PI has trained 163 people out of the 313 residents to ride transit. Now Trudy sends PI referrals directly. Once trained, seniors are also able to take the bus down to city hall to ask for what they need. PI took a whole group to city hall to bring forth issues about a certain traffic light that was not long enough for them to cross the street safely. (In six days, the crossing light time was corrected.)
- A component of the Mobility Training program includes use of an out of service bus to teach trainees how to use the lifts before they ever get out to the streets, so that when the bus arrives, they know how to board and de-board the bus. This greatly assists transit drivers.
- PI is also involved in sensitivity training of regional transit drivers about disabled riders. PI spends a full day out in the community, putting drivers in blindfolds, wheelchairs and visual acuity glasses. They take them to one of the malls and have them spend an afternoon trying to order lunch and get around with these limitations. Then come back and discuss the experience. It has a great impact on the drivers when they actually get out on the street.
- PI mobility trainers have flexible hours beginning and/or ending sessions based on client needs. They get referrals from their Regional Center (like our San Andreas) the Department of Rehabilitation. For no cost, PI provides individuals with an ID, valid bus pass sticker for time they are training, and assistance in filling out the ADA applications in case they need to use paratransit for some or all of their trips. PI also considers itself a mobility options department: advising trainees about their transportation options including how to use light rail. In the future PI may have ambassador or buddy programs.
- Regarding training manuals, PI found that seniors like to have written resource materials. PI creates different books for each place that they train. PI also has developed a Mobility Training Certification handbook that includes what the trainer has to learn. The key is to hire people who have excellent people skills, are compassionate and that will do a good job.
- Question: Please explain more about free bus passes for people 75 and over.

Answer: This program was devised by the public transit agency to create an incentive for seniors to look at using bus and light rail transit first rather than using paratransit. Public transit should be the first mobility option people should think about when they lose their driver's license, not complementary ADA Paratransit.

Comment: This is a concept that could really help both Metro and paratransit: a free bus pass at \$23/month is equivalent to the cost for approximately paratransit trip. (

- Question: What type of programs has PI or the transit district created to encourage people to use public transit besides the free 75+ bus pass? One of the problems here is ridership is not expanding. How do we entice people to ride the bus?

Answer: First, by showing people that they can easily use public transit. Second, there is a benefit to creating relationships; training one senior, doesn't accomplish what happens when two are trained. When people move to a senior facility, they usually don't know anyone. If a couple of people can teamed to ride transit together, they start going out into the community more. Then they tell some more people and it snowballs. They have groups of people that they see out in the community all the time. They go out together shopping, and forming groups. They're forming lunch clubs. The biggest incentives are free or reduced passes. PI doesn't offer hats and bags or cutesy things like that. What the bus pass offers is independence and freedom of mobility. Paratransit in Sacramento requires one to two days advance notice. Public transit users can travel where ever they want to go – whenever the bus is running.

Funding:

- Question: You said the bus passes are given away free by the regional transit. They must be subsidized. How are they paid for?

Answer: The regional transit agency has chosen to pay for them out of their operating budget and find that it saves them ADA paratransit costs.

paratransit

a consolidated transportation service agency inc.



FY 2002-2003 Mobility Training Statistics

Total Persons Trained	651
Successful Trainees	629
Unsuccessful Trainees	22
Direct Training Hours	9,416.75
Trips Shifted to Regional Transit District	83,970
Cost of RT Passenger Trips	\$382,065
Cost of Paratransit Passenger Trips	\$1,850,699
Savings to Regional Transit	\$1,468,634

Trips shifted to RT = The projected one-way rides successful trainees will make per month X the number of month's remaining in the Fiscal Year X 80% (the percentage of successful trainees who continue to use RT, as per following surveys).

Cost of RT passenger trips calculated at \$2.31 per trip as per RT's Annual Performance Report and \$2.24 mobility training cost per trip. Total cost \$4.55 per trip.

Cost of Paratransit trips calculated at \$22.04 per trip per RT's Annual Performance Report.

Savings to Regional Transit = The difference between the cost of trips shifted to RT and the cost of those same trips if they had been provided on paratransit service.

J-16

Re: Paratransit, Inc. - serious factual errors

Date: August 18, 2004

To: Paratransit Coordination Task Force

From: Paul Marcelin-Sampson, Metro Riders Union representative

Memo:

It appears that there are serious factual errors in the Paratransit, Inc. presentation summary (Attachment 1 to the Minutes of our June 16, 2004 meeting). Many of them seem to come not from the transcription process, but from the presentation itself.

I request that this memo be included in the permanent public record of the proceedings of our Task Force. I do not mean to criticize any person or agency. In fact, I would single out Paratransit, Inc. as an agency that does many good things. Nevertheless, we owe it to the people of Santa Cruz County to maintain a realistic outlook.

Summary

Apparent Error	Correction
"annual budget is \$10-\$11 million"	Paratransit, Inc.'s operating budget alone exceeded \$11 million in 2003. The total, with capital costs, was \$14 million.
"system has no restrictions"	Service area not county-wide. No 24-hour service. Reservations required. ADA eligibility rules apply, except for people 75 and over who are traveling only within the City of Sacramento.
"same day service"	Paratransit, Inc. Web site: "We do not provide same-day emergency service."
"the public transit agency is being subsidized by a non-profit"	Some of Paratransit, Inc.'s funding happens to pass through the transit agency first, and some doesn't. Either way, it's locally-administered public money.
"PI doesn't worry about [commingling]."	Transit agency documents: "Paratransit, Inc. currently has 58 paratransit vehicles <u>exclusively dedicated</u> to ... ADA complementary paratransit service."
"ballot measure proposes to increase [Paratransit, Inc.'s sales tax share] to 4.5%"	Share is only 3.5% for first ten years. A large part of the increase replaces existing funding from the City of Sacramento and the County of Sacramento.

I explore each of these items in greater detail, below.

Note: "Sacramento RT" is the principal public transit provider in Sacramento County.

Apparent Error	Correction
<p>"Their annual budget is <u>\$10-\$11 million</u>" [Attachment 1, p. 1]</p>	<p>"Cost to Provide Services" in 2003 was \$14 million;</p> <ul style="list-style-type: none"> • \$11,350,039 went to transportation, • 628,262 went to mobility training, and • 2,040,000 went to capital. <p>See Paratransit, Inc.'s "The Challenge", which the presenters handed out during their presentation.</p>
<p>"Their system has <u>no restrictions</u>" [Attachment 1, p. 1]</p>	<p>Paratransit, Inc.'s programs have restrictions, such as:</p> <p><u>For ADA Paratransit:</u></p> <ul style="list-style-type: none"> • Service area: not county-wide. Roseville, Folsom and West Sacramento are excluded. • Span of service: 6:30 AM to 12:30 AM • Reservations: required • Earliest reservation: two days ahead • Latest reservation: one day ahead, before 5 PM • Disability status: "A person must have an actual physical, visual, or mental functional limitation which causes him or her to be unable to use accessible fixed-route transportation." <p>See Paratransit, Inc.'s "Frequently Asked Questions" and Sacramento RT's "Eligibility Requirements for ADA Paratransit Service".</p> <p><u>For Senior Transportation Service:</u></p> <ul style="list-style-type: none"> • Minimum age: 75 years • Service area: City of Sacramento ("If you are disabled and will need to use paratransit service outside of the greater Sacramento area, we recommend you apply for ADA service.") <p>See Sacramento RT's "Instructions to Apply for Senior Transportation Service".</p> <p><u>In General:</u></p> <ul style="list-style-type: none"> • Capacity constraints: "When at capacity [<i>sic</i>], alternative times and/or days may be negotiated, a non-guaranteed 'standby' reservation may be offered, or the trip may be denied." <p>See "Policies related to individual users of Paratransit, Inc.'s service". [Side Note: In the ADA paratransit context, parts of this Paratransit, Inc. "policy" would be illegal, and I hope that they are not applied in practice. The current trip denial rate for ADA paratransit is 1.8%, per Sacramento RT's "Strategic Plan 2004-2009".]</p>

<p>"PI does <u>same day</u> service" [Attachment 1, p. 3]</p>	<p>"Reservations are accepted one to two days in advance of the day of your ride. We do not provide same-day emergency service." See Paratransit, Inc.'s "Frequently Asked Questions".</p>
<p>"ADA Service - The regional transit agency (RTD) pays PI about 45% of the cost to provide service ... In this case <u>the public transit agency is being subsidized by a non-profit.</u>" [Attachment 1, p. 4]</p>	<p>The "subsidy" is an artifact of Sacramento County's chosen transportation funding mix. Whether locally-administered public money comes to Paratransit, Inc. directly, as in the case of a portion of the Measure A sales tax, or indirectly, as in the case of the transfer from Sacramento RT, it is still public money. The "Where the Money Comes From" graph in Paratransit, Inc.'s (untitled) brochure suggests that locally-administered public money is Paratransit, Inc.'s <i>only</i> funding source.</p> <p>In 2004-2005, Paratransit, Inc. is set to receive:</p> <ul style="list-style-type: none"> • \$8.7 million from Sacramento RT • \$1.9 million from the TDA (Transportation Development Act -- sales tax money returned to counties) • \$1.7 million from the Measure A county sales tax • \$661,629 from the City of Sacramento • \$66,600 from Sacramento County <p>I had to compile these figures using documents from each of the funding agencies. Unlike its funders, Paratransit, Inc. does not publish its budget online.</p>
<p>"Metro's ADA Program will not allow anyone other than the ADA passenger to ride the vehicle ... Is that an issue in Sacramento? ... PI doesn't worry about it." [Attachment 1, p. 5]</p>	<p>According to multiple Sacramento RT documents, "Paratransit, Inc. currently has 58 paratransit vehicles <u>exclusively dedicated</u> to the provision of ADA complementary paratransit service." See, for example, RT's 2003-2004 and 2004-2005 budget documents.</p>

<p>"PI currently receives 1.8% of revenues generated by a local sales tax. A November 2004 ballot measure proposes to <u>increase</u> that amount <u>to 4.5%</u> of the revenues raised." [Attachment 1, p. 7]</p>	<p>The final text of the ballot measure is quite different, and is consistent with proposals that were available in May -- <i>before</i> Paratransit, Inc. addressed our Task Force.</p> <ol style="list-style-type: none"> 1. The allocation would rise gradually: <ul style="list-style-type: none"> • 1.8% (current allocation) • <u>3.5%</u> from 2009 through 2019 • 4.5% from 2019 through 2029 • 5.5% from 2029 through 2039 2. A large part of the initial increase would <u>replace</u> existing contributions from the City of Sacramento and the County of Sacramento, which "will expire with the Existing Tax". 3. The expenditure plan could be <u>amended</u> in 2019 and again in 2029, "to meet changing transportation needs." <p>See Sacramento Transportation Agency Ordinance No. STA 04-01.</p>
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Sources

- Sources are listed in order of first reference.
- Online documents were downloaded on August 14, 2004. Copies have been kept, in case the documents change in the future.
- "Proposed" budgets were used only when "final" versions were not available online.

"The Challenge - Meeting the Growth in Demand for Paratransit Services" (Paratransit, Inc. hand-out, no date)

"Paratransit, Inc. - Frequently Asked Questions (FAQ)"
<http://www.paratransit.org/html/faq.html>

"Eligibility Requirements for ADA Paratransit Service" (Revised 10/9/03)
http://webster.sacrt.com/Public_Docs/Publishing/Download/ParatransitRequirementsBrochure.pdf

"Instructions to Apply for Senior Transportation Service" (Revised 8/2/02)
http://webster.sacrt.com/Public_Docs/Publishing/Download/STS-AppNORMAL.pdf

"Policies related to individual users of Paratransit, Inc.'s service" (Amended January 27, 2000)
http://www.paratransit.org/html/passenger_policies.html

"Sacramento Regional Transit District - Strategic Plan 2004 - 2009"
<http://www.sacrt.com/documents/StrategicPlan.pdf>

Paratransit, Inc. brochure (no title, no date, contains a graph entitled "Where the Money Comes From")

"Operating and Capital Budget - Sacramento Regional Transit District - Fiscal Year 2003-2004"

<http://www.sacrt.com/documents/RTbudget.pdf>

"Sacramento Regional Transit District - Proposed Budget FY04 - FY05"

<http://www.sacrt.com/documents/budget04-05.pdf>

"Transportation Development Act - Local Transportation Fund - Findings of Apportionment For FY 2004/05"

<http://www.sacog.org/transit/LTF200405.pdf>

"Draft FY 2004 2004-05 Budget -

Measure A One-Half Per Cent Transportation Sales Tax [etc.]"

<http://www.sta.sacramento.ca.us/agendas/2004/items/05-21-2004-06AT.pdf>

"City of Sacramento - FY2004/05 Proposed Budget"

<http://www.cityofsacramento.org/budget/operating/fy2005/proposed/pdf/FY2005-Proposed-Budget.pdf>

"County of Sacramento, California - Proposed Budget 2004-2005"

<http://www.saccounty.net/budget/ba-ir/fy2004-05/2004-05-proposed-budget/>

"Ordinance No. STA 04-01"

<http://www.sta.sacramento.ca.us/pdf/OrdSTA-04-01.pdf>

"Measure A Expenditure Plan Development -

Staff/Consultant Recommendation - May 21, 2004"

<http://www.sta.sacramento.ca.us/agendas/2004/items/05-28-2004-recexplan.pdf>

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