

# DRAFT Implementing Guidelines

## **For the *Special Transportation for Seniors and People with Disabilities* Program funded through Measure B**

### **Purpose**

These implementing guidelines accompany the new Master Funding agreements between the Alameda CTC, city-based mobility programs for seniors and people with disabilities, and ADA paratransit providers that receive Measure B pass-through funding. These guidelines specify the rules that these programs must follow in their use of Measure B funds and, where applicable, the Vehicle Registration Fees (VRF). These guidelines are incorporated by reference in the Master Funding Agreements. All other terms and conditions for programs are contained in the agreements themselves. Exceptions to these guidelines must be approved by the Alameda CTC.

### **Background & Context**

There are a number of current issues in Alameda County that have set the stage for the development of these implementing guidelines:

**Limited Funding and Increasing Demand for Service:** The economic recession has had a notable impact on Alameda County transportation programs and transit operators. In particular, the decline in Measure B sales tax revenue has impacted programs severely since they depend on pass-through tax revenue for day-to-day operations, and transit agencies in Alameda County have been forced to cut service and raise fares due to revenue reductions from a range of sources. Finding additional funding from other sources is unlikely, as traditional federal and state funding sources have been decreasing over time; it is essential to use the available Measure B and VRF funds, as applicable, effectively. These economic hardships come at a time when the senior population is increasing and projected to increase at a higher rate in coming years due to the aging of the Baby Boom generation. Growth is projected to be particularly high in the segment of the population age 75-84 who more heavily depend on specialized transportation services.

**Diversity of Existing Programs:** The city-based programs in Alameda County are very diverse. City programs have been given a great deal of latitude to establish individual programs to serve the needs of their senior and disabled populations. As a result, programs have evolved to be quite distinct from one city to the next. Eligibility requirements, fare structure, service hours and service areas vary widely; the City department that oversees the program also varies from city to city. Perhaps the most fundamental source of diversity is that each city has chosen to operate different types of services to meet the needs of their senior and disabled residents, including taxis, van contractors, city-run shuttles, and city-run door-to-door programs, among others. In 2006 PAPCO approved a series of Minimum Service Levels (MSLs) that has resulted in a somewhat greater level of program consistency. However the programs remain very diverse in their service parameters and modes of service delivery, raising potential issues of equity in terms of the options available to individuals in different cities.

**Mobility Management in Alameda County:** The field has evolved substantially over the past decade since many of the Measure B-funded senior and disabled transportation programs began. Increasingly, mobility management is replacing traditional segregated paratransit service with a more integrated approach. Alameda County has been examining the feasibility and effectiveness of increased coordination over the past few years, most notably through the Countywide Coordination Summits in 2006-2009, the *2010 Service Delivery Analysis*, and the Coordination

and Mobility Management Planning Process (CMMP) in FY 2010-2011, which focused on identifying opportunities to streamline and/or implement effective mobility management programs.

**Desire for more Uniformity:** The outcomes of the Coordination and Mobility Management Planning (CMMP) process in FY 2010-2011, indicated that it may be beneficial to create more uniformity throughout the County as to program design and service parameters. More uniformity in program design, service parameters and availability of services across the County would improve equity and reduce confusion for new users, social service providers and tax payers.

**Potential for an Optimized “Suite” of Programs:** During the CMMP process, the idea was also proposed that each area of the county could have an array of available services that cross jurisdictional boundaries of the cities within a specific planning area and potentially into other planning areas. This would enable a “suite” of complementary programs in each region of the County that is tailored to the unique needs of that planning area. Ideally, this mix of services would reduce redundancy between services.

## Types of Service in Alameda County

In order to develop a comprehensive approach to addressing the issues stated above, the following section provides an overview of services currently provided through Measure B. In order to address differences in the timing, origin and destination of a trip as well as the abilities of the passenger, a range of service types is necessary to meet the spectrum of mobility needs across the county.

Most services can be categorized along the following dimensions that most affect the consumer experience:

1. **Timing:** Same day versus pre-scheduled
2. **Accessibility:** Accessible vehicles versus those that do not accommodate wheelchair or scooter users
3. **Origins/Destinations:** Door-to-door versus fixed route
4. **Cost to Customer:** The out-of-pocket cost to the consumer for utilizing the service.

The primary types of transportation service currently provided in Alameda County for seniors and people with disabilities are shown in the table below. Each of these serve a different travel niche based on how they meet these customer experience parameters as shown below.

**Figure 1 Customer Experience Parameters by Service Type**

| Service Type     | Customer Experience Parameters           |                          |                          |                     |
|------------------|--|--------------------------|--------------------------|---------------------|
|                  | Timing                                   | Accessibility            | Origins/<br>Destinations | Cost to<br>Customer |
| ADA Paratransit  | Pre-scheduled                            | Accessible               | Origin-to-Destination    | Varies              |
| Door-to-Door     | Pre-scheduled & Same Day                 | Accessible               | Origin-to-Destination    |                     |
| Taxi Programs    | Same Day                                 | Varies                   | Origin-to-Destination    |                     |
| Shuttle Programs | Set Schedule (some allow for flag stops) | Accessible               | Fixed Route              |                     |
| Group Trips      | Pre-scheduled                            | Accessible               | Fixed Route              |                     |
| Volunteer Driver | Pre-scheduled                            | Generally Not Accessible | Origin-to-Destination    |                     |

Some city programs do not cleanly fit in these service type categories due to program particularities or because they are hybrids of different standard service types. In addition, some programs use their Measure B allotment to fund programs that do not directly provide transportation trips, such as subsidizing East Bay Paratransit tickets or funding meal delivery programs.

The matrix above is provided as a simple way to illustrate service types that may be interchangeable in terms of the type of service they provide to the consumer. This chart will be referenced in this document to define exactly what transportation niche a service fills and the appropriate guidelines for that service type.

## Implementing Guidelines

### Taxi Programs

**Background/Justification:** Taxis are one of the least costly ways to provide a curb to curb trip in Alameda County according to the data currently available. These guidelines are intended to better define the role that taxis play in relationship to other services. Currently, the parameters of taxi programs throughout Alameda County vary widely (e.g. level of reimbursement and length of trip). As part of the Service Delivery Analysis and CMMP process, the possibility of moving towards a partial or full countywide taxi program was considered. This step would necessitate more consistency in eligibility, subsidy method and level, and trip limits. These guidelines are intended to take a step in this direction

| Taxi Service Parameters            |   |
|------------------------------------|---|
| <b>Service Description</b>         | A “premium” service intended to be a safety net to meet needs of eligible patrons for situations when they cannot make their trip on a pre-scheduled “next-day” basis. Not meant to be a routine service to be used on a daily basis. Therefore, these guidelines are designed to incentivize people to use the vouchers selectively at their discretion while taking affordability into consideration. |
| <b>Customer Service Parameters</b> | Same-day<br>Expand accessible taxi vehicles where possible<br>Door-to-door/curb to curb service   |
| <b>Eligible Population</b>         | Seniors 70 years or older without proof of a disability<br>People 18 and above with disabilities who are unable to use fixed route services.  |
| <b>Time and Days of Service</b>    | 24 hours per day/7 days per week  |
| <b>Fare (Cost to Customer)</b>     | Subsidy level: \$3 user cost for \$10 in voucher/scrip value (70% subsidy)<br>Limit: Four \$10-voucher/scrip books per person per month. This is 48 books per year for a total of \$480 in voucher/scrip per person (a subsidy of \$336 per person per year).<br>No limit on the number of vouchers that can be used per taxi trip.   |

## City Fixed Route Shuttles or “Accessible Community Buses”

**Background/Justification:** Analyses done in the past year have identified that current shuttle services are the most expensive service provided in Alameda County (aside from ADA paratransit) on a cost per trip basis. The Service Delivery Analysis and CMMP process identified that cities may be implementing shuttles that would be more appropriately provided by AC Transit, and AC Transit has had concerns in the past about shuttles providing services that duplicate AC Transit routes. In addition, the CMMP process has identified that making city-based shuttle programs accessible to the general public (possibly for a higher fare) might improve their cost effectiveness by raising ridership and revenue.

One avenue for addressing these issues is moving towards a lower cost “community bus” model that is required to coordinate with AC Transit. The guidelines were designed to move towards this model and ensure that the role and importance of shuttles in serving trip needs is clearly defined.

| City Shuttle Bus Service Parameters   |   |
|---------------------------------------|---|
| <b>Service Description</b>            | <p>Shuttles are accessible vehicles that operate on a set schedule to serve common trip origins and destinations visited by program participants. Common trip origins and destinations are: senior centers, medical facilities, grocery stores, BART stations, other transit stations, community centers, commercial districts, and post offices.</p> <p>Community circulator and shopping shuttles should be designed to <i>supplement</i> the services operated by transit agencies. Routes should not necessarily be designed for fast travel, but to get as close as possible to destinations of interest, often going into parking lots or up to the front entrance of a senior living facility. Shuttles allow for more flexibility than next day paratransit service, and are more likely to serve active seniors who do not drive than ADA paratransit registrants.</p> |
| <b>Customer Experience Parameters</b> | <p>Fixed schedule</p> <p>Accessible</p> <p>Fixed Route</p>  |
| <b>Eligible Population</b>            | <p>Shuttles should be designed to appeal to older people, but programs should move towards being open to the general public, not exclusively limited to seniors and/or people with disabilities. The senior and disabled communities should be involved in making any policy and/or operational changes to ensure that the program continues to prioritize meeting the needs of seniors and people with disabilities.</p>   |
| <b>Time and Days of Service</b>       | <p>At discretion of program sponsor with local consumer input.</p>  |
| <b>Fare (Cost to Customer)</b>        | <p>At discretion of program sponsor with local consumer input.</p>  |
| <b>Cost of Service</b>                | <p>Within 2 years of commencing shuttle operations, the cost per one-way trip must be \$20/trip or lower.</p>   |
| <b>Other</b>                          | <p>To start a local shuttle, a program must demonstrate how the service will fill a gap that is not covered by another service.</p> <p>Any city shuttle is required to coordinate with the local fixed route provider.</p> <p>Any shuttle plan must be submitted to the Alameda CTC for review prior to requesting funding to ensure effective design with clear origins and destinations.</p> <p>No deviations, except for flag stops at discretion of program sponsor.</p>  |

## City-based Door-to-Door Services

**Background/Justification:** Recent service analyses have questioned whether city-based door-to-door services, some of which predate the ADA, provide redundant services with ADA paratransit. This is a concern in an environment of increasingly limited resources and growing need. City-based door-to-door services can only be funded through Measure B and/or VRF revenues if they clearly serve a need not met by ADA paratransit service or by any other community transportation service.

In most cases the services are intended to fill gaps that are missed by ADA service, such as serving customers who live outside the ADA service area. When available on a same-day basis they can fill gaps in accessible same day service which are often not reliably met by taxi companies (however, most of the currently operating programs function primarily on a pre-scheduled basis and are not 100% reliable as same day service). City-based door-to-door services could play a very useful role in serving certain trips that are particularly costly for ADA paratransit services to meet. However it is unclear whether this is currently occurring.

The following guidelines were designed to address these issues and ensure that the role and importance of city-based door-to-door services in serving trip needs is clearly defined.

| <b>City-based Door-to-Door Service Parameters</b> |   |
|---|---|
| <b>Service Description</b>                        | City-based door-to-door programs provide a similar level of service to the mandated ADA services; when same day, the service functions like a supplemental accessible taxi service.   |
| <b>Customer Service Parameter</b>                 | Pre-scheduled (same day reservations on a space-available basis)<br>Accessible<br>Door-to-door  |
| <b>Eligible Population</b>                        | Seniors 70 years or older without proof of a disability<br>People 18 and above with disabilities who are unable to use fixed route services.  |
| <b>Time and Days of Service</b>                   | At discretion of program sponsor with local consumer input, depending on unique gap service is intended to fill.  |
| <b>Fare (Cost to Customer)</b>                    | At discretion of program sponsor with local consumer input, depending on unique gap service is intended to fill.  |
| <b>Other</b>                                      | Due to the fact that these door-to-door programs run a high risk of being redundant with ADA services, the unique mobility niche they serve must be clearly defined in order to exist.<br><br>City-based door-to-door services should exist only where ADA paratransit service and taxi services are not available unless program sponsor can justify how service is filling a gap not being met by any other community transportation service. |

## Volunteer Driver Programs

**Background/Justification:** While there are some challenges involved with initiating and maintaining volunteer driver programs (e.g., driver recruitment, addressing liability concerns), these programs have the benefit of filling a critical mobility gap by providing door-through-door service model that is essential for many older adults and people with disabilities. These trips are a limited resource and should be directed to those populations who most need the trips.

Currently, there are no volunteer driver programs that are funded as part of a pass-through program. However, this is an allowable service type that is eligible for funding from Measure B pass-through and/or VRF revenues; any current grant-funded volunteer driver program would be eligible to transition to operating with pass-through funding.

| <b>Volunteer Driver Program Service Parameters</b> |  |
|--|--|
| <b>Service Description</b>                         | Volunteer driver programs meet a key mobility gap by serving door-through-door trips for more vulnerable populations. This is a complementary gap-filling service.   |
| <b>Mobility Role/Niche</b>                         | Pre-scheduled<br>Generally not accessible<br>Door-through-door   |
| <b>Eligible Population</b>                         | If resources allow, program should be made available, at minimum, to seniors 70 years or older without proof of a disability and people 18 and above with disabilities who are unable to use fixed route services.<br><br>If sufficient resources are not available, program eligibility can be further restricted through additional eligibility criteria at discretion of program sponsor. |
| <b>Time and Days of Service</b>                    | At discretion of program sponsor; based on the availability of volunteers.   |
| <b>Fare (Cost to Customer)</b>                     | Free to user or donation-based.  |
| <b>Other</b>                                       | Program sponsors can use Measure B funds to pay for volunteer mileage reimbursement purposes or administrative purposes.   |

## **Group Trips**

Group trips are round-trip accessible van rides for pre-planned outings or to attend specific events or go to specific destinations for fixed amounts of time, e.g. shopping trips or religious services. Trips usually originate from a senior center or housing facility.

Based on recent service analyses, group trips appear to be a relatively low cost service type. Group trips can fill a key role in serving trip needs that would otherwise be met by much higher cost services.

This is an allowable service type that is eligible for funding from Measure B and/or VRF revenues.

## **Mobility Management & Travel Training**

Recent service analyses have indicated a need to better match each trip to the most appropriate and cost effective service for the person making that trip. Mobility management and travel training play an important role in ensuring that people use the “right” service for each trip, e.g., using EBP from Fremont to Berkeley for an event, using a taxi voucher for a same-day semi-emergency doctor visit, and requesting help from a volunteer driver or group trips program for grocery shopping.

This is an allowable service type that is eligible for funding from Measure B and/or VRF revenues.

## **Other Services funded through Measure B**

### **Meal Delivery Services**

Some programs choose to fund meal delivery programs with their Measure B pass-through funds. This provides access to life sustaining needs for seniors and people with disabilities. Therefore, although this is not direct transportation service provision, it is an allowable service type that is eligible for funding from Measure B and/or VRF revenues.

### **Scholarship/Subsidized Fare Program**

East Bay Paratransit ticket purchase programs are not an allowable expense to fund with Measure B revenues, as they induce demand on the costly EBP service without necessarily targeting individuals whose financial situation impedes their ability to ride. A “Scholarship Program” or “Subsidized Fare Program” designed to subsidize tickets for customers who are low-income and can demonstrate financial need is a service type that is eligible for funding from Measure B and/or VRF revenues.

To establish a program and receive funds, the sponsor must describe how financial means testing will be undertaken and cannot use more than 3% of their pass-through funds for the program.

## **ADA-mandated Services**

ADA-mandated programs are a service type that is eligible for funding from Measure B and/or VRF revenues. These programs are implemented and administered according to federal guidelines that supersede these guidelines; however all ADA-mandated programs funded through Measure B or the VRF are subject to the terms of the Master Funding Agreement.

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