

**IMPROVING
SPECIALIZED
TRANSPORTATION
SERVICES
IN
SANTA CRUZ COUNTY**

*A Historical Review
and a Call to Action
for Meeting the Challenges of the New Millennium*

**Prepared by Clay Kempf
Executive Director Seniors Council/Area Agency on Aging**

OVERVIEW

Santa Cruz County developed a comprehensive system of public transportation services for the elderly and the disabled in 1980-81, giving birth to the designation of Food and Nutrition Services as the Consolidated Transportation Services Agency (C.T.S.A.) of the County.

A series of events have led to the expansion of these services over the past two decades, the most significant of which was the passage of the Americans with Disabilities Act in 1990, leading to an increased role by the local Metro, as required by law.

Recent economic challenges in the nation have pressured funders to save costs by service reductions, often constraining the delivery of many services and limiting options for coordination and unintentionally creating confusion regarding program guidelines.

We are about to experience an aging of the population to an extent never before experienced. The fastest growing segment of the California population is those aged 85 and over; clearly, huge increases in this age group will put demands on the paratransit system never before experienced.

Over \$5,000,000 is being spent annually by the CTSA to provide paratransit services, yet rides provided, coordination of trips, user satisfaction, and community confidence in the services are dropping, and the CTSA is operating at a huge financial deficit. This downward trend has been the result of a less collaborative service environment, and a loss of community vision and commitment to an integrated system of service delivery.

This paper is a call to action for the community to work as partners in creating a new vision and strategy to improve transportation services to the elderly and disabled members of our community, and to meet the demand for service created by the aging of our society.

Through improved coordination and creation of innovative partnerships, more rides can be provided, efficiency can be increased, customer satisfaction can improve, and, *costs of providing service can be reduced.*

The following pages provide a brief history of services, and include suggestions for action steps to be taken by the community at large to implement and achieve these worthy goals.

BACKGROUND

History of Paratransit in Santa Cruz County

Starting in the 1970's, the community has called for and supported a number transportation programs for seniors and the disabled. The first of these was the Volunteer Center's Lift Line Program, providing door-to-door service for individuals unable to ride the public buses. At approximately the same time, the Golden Age Nutrition Program began operating vans to transport seniors to congregate dining centers throughout the region, and Sunrise Services operated additional vehicles to transport seniors to their Adult Daycare Center.

Creation of the Consolidated Transportation Services Agency (C.T.S.A)

In 1979, the passage of AB120 by the California State Legislature required local entities to create action plans and designate Consolidated Transportation Services Agencies to oversee local paratransit operations.

During 1980 and 1981, a series of community input and planning sessions led by the Santa Cruz County Regional Transportation Commission (SCCRTC) resulted in Food and Nutrition Services (the parent agency of Golden Age Nutrition) being designated the local CTSA. The Volunteer Center agreed to spin-off Lift Line, which became a part of Food & Nutrition Services (FNS). Sunrise Services merged with FNS, and the three previously separate transportation services combined as the main programs operated by the CTSA, creating more efficient, more effective, and less expensive services to the mutual benefit of everyone.

Throughout the 1980's, the CTSA worked to expand and enhance transportation options for the local community, constantly seeking new ways of providing service and addressing unmet need in the community. Some of these services included partnering with local private non-profit agencies (e.g., The American Red Cross); others with local private for-profit companies (e.g., Santa Cruz Transportation, Inc.); and still others involved partnering with public entities (e.g., Santa Cruz County Human Resources Agency). These new and/or expanded services included taxi scrip programs, Stroke Center routes, Dialysis services, Medi-Cal programs, out of county medical transportation, gurney transportation at a fraction of ambulance costs, etc.

ADA Paratransit

The 1990 passage of the Americans with Disabilities Act put the delivery of paratransit services on the front burner of every transit operator in the nation. Among its many components, this landmark civil rights act required all public providers of fixed route service to create a parallel system of transportation for those who were unable to ride public transit due to physical or cognitive limitations. Across the nation, transit operators struggled to develop plans and resources to meet this new challenge.

In Santa Cruz County, an existing informal partnership between the CTSA and the Santa Cruz Metropolitan Transit District (SCMTD) was expanded upon and formalized. After months of planning, public hearings, brainstorming session, and contract negotiations, an ADA Paratransit Plan was adopted. This plan called for a partnership between the CTSA and the SCMTD to expand existing demand-response services to fill the legal requirements of the ADA. Since the demand-response service being operated by the CTSA was already very similar in nature to that required by the ADA, the main thrust of effort was directed at meeting the increased hours and ridership of the expanded service.

As might have been expected, a nationwide shortage of wheelchair-accessible vehicles impacted the local system in similar ways it affected the rest of the country. Service limits were established, adjusted as new vehicles were acquired, and eventually, qualifying riders were allowed unlimited trips to any destination, as required by law.

Ridership continued to grow throughout the decade, more than quadrupling in a short time frame. SCMTD was forced to bear the costs of this increased ridership without the support of any new funding streams. The CTSA augmented the SCMTD service by aggressively pursuing grant opportunities to expand the local vehicle fleet and improve other operations systems, such as the purchase of a state of the art computerized dispatch and scheduling system.

In an effort to address runaway costs and improve service, SCMTD engaged two independent companies to thoroughly review the operation. One of these entities focused on passenger eligibility issues, while the other focused on an operational review of the CTSA.

After these reviews, SCMTD implemented several operational changes, some minor, and some significant. These included a complete revamping of the eligibility process, as well as eliminating the historical practice of co-mingling rides between funders in particular vehicles. The methodology by which operational costs were determined for reimbursement by SCMTD were switched from a cost per ride basis, to a cost per service hour model.

Paratransit services were put out to bid, with SCMTD selecting to contract with an out of area, private for profit company to provide the service, and only returned to the CTSA model after the selected applicant was forced to withdraw due to conflict of interest implications.

Current State of Operations

Current paratransit services are more fragmented than at any time in the past decade. Consumers are confused by the different service parameters available; cost efficiencies (e.g., shared rides) are prohibited by some funders; clients are left waiting for rides while a vehicle picks up another rider at the same destination, etc. Some operating dynamics make no sense whatsoever. For example, Lift Line schedulers and dispatchers are faced

with the challenge of making sure ridership is at least 1.9 rides per hour, but also that it is less than 2.0 rides per hour in order to make the delivery of services financially viable.

Community Bridges lost approximately \$800,000 in FY 2002-03, the majority of which was associated with the new parameters of their SCMTD ADA contract.

SCMTD's most recent contract for ADA Paratransit Services has been in operation for over one year now, and the time is right for making changes to some of the above examples of counter productive requirements.

Much of the aging community has experienced frustration with the new client certification process.

The vast majority of community service agencies in Santa Cruz County have increased their efforts to collaborate and consolidate services in order to maximize cost efficiency and minimize duplication of services. The community as a whole is well versed and committed to the philosophy of partnering with each other to design and deliver services. Transportation services need to be part of the collaborative efforts.

A work group to develop improved specialized transportation services would be embraced by the community in this environment. Community support of specialized transportation services would increase dramatically. Agencies involved in convening and participating in such a process would enhance their status as community leaders, and gain additional support in efforts to advocate for and improve the quality of all local transit services.

MEETING THE CHALLENGE OF IMPROVING SERVICE

Convening Community-Wide, Specialized Transportation Summit

To address diminishing available funds, operational deficiencies, lack of community confidence in the services, and to prepare for the upcoming exponential increase in the senior population, the SCCRTC is encouraged to hold a Transportation Summit to invite community input and provide for policy-maker buy-in to developing solutions to the current situation. This Summit can be broken down into several components, including providing a history of paratransit services in the community, an explanation of current programs and their similarities and differences, and an exploration of how to move forward in creating a new paradigm to meet the transportation needs of the Senior and the Disabled population. A wide variety of elected officials, paratransit and fixed route riders, key public administrators, social service providers, senior and disabled advocates, transportation planners, Skilled Nursing & Residential Facilities operators, community leaders and other interested parties will be invited. The Summit is intended to set groundwork for the creation of a Community Task Force to create an action plan for the implementation of services to meet the community's need for service within available

funding restrictions. Suggestions for representatives and process for the formation of such a task force will be developed as an outcome of the Summit.

Task Force Duties

The participants in the Transportation Summit will identify key issues for the Task Force to address. Among those key issues will be the following points:

- *Create a vision for the role the CTSA of Santa Cruz County should play in the community*
- *Develop a method for insuring ADA Paratransit services are coordinated with other community-based paratransit.*
- *Make recommendations for which agency should operate as the CTSA*
- *Identify new and existing funding sources for the provision of services.*

Services to be Considered

The variety of services that can be provided locally is only constrained by the imaginations of the program designers and available funds. Programs & services already in existence and/or mentioned frequently in unmet needs hearings include ADA Paratransit, Medi-Cal Transportation, MSSP Taxi Scrip, Private Taxi Scrip, Mealsite Transportation, Out-of-County Transportation, Volunteer Transportation, Special Event Transportation, Stroke Center Transportation, Hospital Discharges, etc. Special Projects could include items such as driver training and vehicle maintenance.

A NEW VISION FOR A POSTIVE RIDER EXPERIENCE

Eligibility Process

With a wide variety of services available, eligibility criteria will be complex. In person eligibility screenings can continue in much the same manner as SCMTD currently conducts, but with added enhancements to make the process more effective. For example, the eligibility screener can serve as a personal transportation planner, working with the rider and their care providers to develop their method of public transit in the community. The rider will be fully assessed to determine which transportation services are eligible and appropriate for them. By connecting the rider with the most appropriate service for their needs, quality improves and service costs are minimized. Should the person not qualify for any of the CTSA sponsored programs, they will be provided information regarding fixed route buses, including travel training and trip planning services.

Scheduling a Trip

Riders who have been determined eligible will experience a seamless point of entry for all of their rides. One centralized number will be called, where the rider's information is stored in a sophisticated scheduling system. The rider will request their service and the ride will be scheduled by the appointment specialist. Standard fare for each trip will be \$3 each way. The Scheduling System will charge the client's ride to the appropriate funding program based on the nature of the trip. The Scheduling System will also provide for the options of discounts that may be available to the passenger, of which the Appointment Specialist will inform them.

The rider will not be expected to educate the caller about their eligibility options, but, instead, the call taker will hold that responsibility and will provide support to the caller in meeting their needs.

The Ride

Vehicles will arrive on time to both the pick up and destination. Drivers will be well trained, friendly, and professional. Vehicles shall be clean, well maintained and safe. Riders will regularly share vehicles with other passengers departing from similar locations or going to common destinations.

Current operations are viewed as providing friendly, competent drivers. Recent fleet additions have resolved the majority of mechanical and capacity problems of the past. Improved coordination of services will allow on-time performance to exceed the present rate of 92%.

FUNDING

Runaway costs are often the most prohibitive factor in designing and implementing services to meet the needs of the community. Currently, over \$5 million are spent annually to provide paratransit services. With improved coordination and the creation of a means to develop innovative methods of service delivery and financial incentives to forming partnerships in delivering services, the community can experience far more service for the same cost, or less. Building partnerships and ride-sharing incentives into the system will further insure that any funds, be they those currently spent or new, supplemental funding, will be spent in the most cost-efficient manner possible. These same services will maximize user satisfaction and set new standards in effectively meeting the needs of the riders. Most importantly, *these incentives and partnerships will decrease the current cost of service delivery.*

To accomplish these tasks, community partners will need to be willing to make the financial investment of redirecting the use (but not increasing the amount) of certain local transit funds. Use of these funds will be constrained to require the provision of equivalent or superior service (measured by both cost and quality) to those currently existing.

Funds allocated to the CTSA could be tied in with designated uses in order to insure community priorities, federal and state mandates, and cost efficiencies are prioritized. Examples of how to achieve this include requiring any redirected local transit funds to be used as follows; 30% to supplement ADA-mandated Paratransit Operations (the balance of which is provided by SCMTD); 30% to provide services to the Elderly and Disabled members of the community who have needs which exceed those met by ADA Paratransit; 30% to programs that transport ADA-eligible individuals within the ADA service area AND provide a dollar-to-dollar match for the services; and 10% to be used at the CTSA's discretion to create new and innovative programs and/or supplement any of the first three service categories on a temporary basis.

The dollar-for-dollar match to be generated by the expenditure of 30% of these funds will ultimately reduce the costs SCMTD experiences in providing ADA mandated services, so *this model would result in a net savings to current SCMTD operations.*

MOU's and/or contractual agreements between the SCMTD, the SCCRTC, and the CTSA could provide for additional funding in instances where programs are available to provide matching funds to services transporting ADA-eligible clients and the funds designed to provide this match have been exhausted. Such agreements would again *insure SCMTD experiences a cost savings over the current system.* More importantly, the community would receive improved service, and incentives would be in place for the continual creation of new and innovative partnerships and service delivery models.

Many other options exist for funding these types of services, and are best left to a community-wide task force to review and recommend for adoption. The previous model is only one suggestion for discussion purposes.

COMMUNITY OVERSIGHT AND GOVERNANCE

Advisory Bodies

Santa Cruz County has numerous community groups, advisory bodies, and County Commissions that address issues relating to seniors and individuals with disabilities. These include (but are not limited to) the Metro Accessible Services Transit Forum (MASTF), the Elderly and Disabled Transportation Advisory Committee (E & D TAC), the Central Coast Center for Independent Living, the Area Agency on Aging Advisory Council, and several Santa Cruz County Commissions, including the Commission on Disabilities, the Seniors Commission, and the Long Term Care Interagency Commission. From time to time, each of these groups provides invaluable community input and recommendations to the delivery of services.

In its role as the Paratransit Coordinating Council of Santa Cruz County, the E & D TAC would remain the official CTSA Advisory body. MASTF, in its role as the SCMTD's ADA Paratransit Advisory Body, would continue to serve as the main advisory body to

SCMTD's ADA Paratransit services. However, input from all of the aforementioned community groups, (and others), would be not only welcomed, but expected. The input from such a wide variety of advocates and advisory bodies is essential to insure services meet the needs of the entire community.

Fiscal Oversight

The CTSA would be required to conduct an independent financial audit on an annual basis. The CTSA would continue to provide operational and financial reports to each of its varied funding bodies, per the requirements of the funder.

Board of Directors

Should a new agency be formed, establishment of a Board of Directors representative of all the interested parties will be essential to the delivery of quality services as well as for providing continued buy-in from funding partners (e.g., SCCRTC and SCMTD). This would suggest a Board made up of representatives of these agencies, along the lines of three SCMTD Board Members, three SCCRTC Commissioners, representatives of the CCCIL, the AAA, Skilled Nursing Facilities, riders of the system, etc.

Conversely, however a governing board will have widespread responsibilities for the oversight of the agency, including such diverse activities as operational review, goal setting, fiscal oversight, fundraising, community advocacy, policy setting, etc. Successful Boards of this nature often require a different composition than those described in the preceding paragraph, primarily because the prior composition consists of numerous elected officials whose primary function in the community could potentially compromise their ability to perform all the necessary duties of a Board member due to time constraints.

The Specialized Transportation Task Force would need to have a detailed discussion of these challenges and develop a strategy for insuring all aspects of a Board of Directors' duties are fully addressed and resolved before making a final recommendation in this area.

CONCLUSION

Paratransit services in Santa Cruz County are in dire need of review and improvement. The demand for service is about to experience heretofore unprecedented increases. Financial resources are shrinking. Now, more than ever, increased efficiencies in the delivery of service are essential.

Seniors and individuals with disabilities are a vital part of our community. No single entity can address the needs of this vast and diverse segment of our society. Only through the combined efforts of the community at large, including local electeds, staff, managers, and directors of agencies such as the Santa Cruz Regional Transportation Commission, the Santa Cruz Metropolitan Transit District, the Area Agency on Aging, the Central Coast Center for Independent Living, medical providers and health agencies, residential facilities, community programs, private, public and family caregivers, and, most of all, senior and disabled individuals, will we be successful in meeting the challenges before us.

By coming together as a community committed to improve both the quality of transportation to the elderly and disabled, while at the same time controlling or even decreasing the cost of such services, a new vision can be created to deliver services in the manner that was only imagined when the C.T.S.A. was formed in 1981.

A specialized transportation summit is called for to encourage this dialogue and begin the development of a strategic plan and system of service delivery. Community leaders must step forward to join the call for this summit. Success will be realized if the community believes in the need for these services and takes responsibility for their creation. Local decision makers must respond to this call for action and convene such a summit, and be prepared to develop a comprehensive and meaningful action plan and service delivery system. Failure to act will not only ignore the needs of the community, but will result in continued runaway costs, community frustration, and a continued decline in the independence and quality of life of seniors and individuals with disabilities in Santa Cruz County.