

# ACCT

**Agency  
Council on  
Coordinated  
Transportation**

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ACCT 1998 Report to the  
Washington State Legislature

### Cover photograph:

Teresa “Flying Eagle” Baird using the Transportation Assistance Program (TAP) in rural Snohomish County. “The TAP program is terrific,” comments Baird. “Being confined to a wheelchair with Multiple Sclerosis is terrible. Without TAP, I would be trapped inside my home with no way to get food for my family or get myself to the doctor.”

(Photograph by Drew Perrin, The Herald, 1997.)

Produced by the Agency Council on Coordinated Transportation (ACCT), with the Public Transportation Office, Washington State Department of Transportation.

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# Executive Summary

Every year the people of Washington State invest significant resources in programs aimed at assisting disadvantaged persons. Although access to those services is fundamental to their success, many people with disadvantages are without access and must rely on a variety of transportation services. Those transportation services are often restricted by eligibility criteria, limited capacity, and uncoordinated operations.

In creating the Agency Council on Coordinated Transportation (ACCT), the Washington State Legislature recognized the need to improve transportation for people with special needs.

## Who are people with special transportation needs?

Persons with special transportation needs means<sup>1</sup> those persons, including their personal attendants, who because of physical or mental disability, income status or age are unable to transport themselves or purchase transportation.

## What does this report contain?

This report to the Legislature describes the progress of ACCT as the council begins coordinating transportation for people with special transportation needs. The report contains the following:

- A brief history of efforts to coordinate specialized transportation (Chapter 1)

- A summary of the activities undertaken by ACCT to date (Chapter 1)
- An identification of the primary barriers and issues to be addressed (Chapter 2)
- A vision of a coordinated system (Chapter 3)
- An action plan for achieving the vision (Chapter 4)
- A status report on the demonstration projects funded by the Legislature (Chapter 5)

## What does ACCT recommend?

To improve transportation for people with special needs, ACCT proposes a mix of immediate actions, stakeholder discussions, and demonstration projects. These are presented in full in Chapter 4, “An Action Plan: The Recommendations.”

## Summary of recommendations

First, ACCT proposes providing overall state guidance while vesting local communities with autonomy and flexibility to design their own coordinated system. The proposal creates a coordinated transportation program for people with special needs and makes ACCT responsible to the Governor and Legislature for its implementation.

Guidelines, standards, and reporting requirements will be developed and provided to local communities. Funding

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*When providers coordinate trips, vehicles are filled, duplication is reduced and the cost of travel is lowered for all.*

”

— Brad Bergener,  
Owner, MedStar Cabulance,  
Yakima

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<sup>1</sup> As defined in RCW 81.66.010.

“

***Transportation is a crucial requirement for allowing frail seniors to remain in their own homes. Through the Transportation Assistance Program, transportation for medical appointments, shopping, and socialization is a reality for homebound seniors in this small, rural community.***

”

— Charlie Anderson,  
Living at Home Program,  
Stanwood Senior Center

will be requested to assist with local start up efforts and to support demonstration projects to develop tools and refine best practices. Full implementation will take several years, but a sunset deadline is proposed.

#### Recommendations assigning responsibility

- Providing leadership at statewide level, p. 16
- Implementing a coordination program for specialized transportation, p.17
- Emphasizing local control, p. 19
- Funding coordination efforts, p. 19
- Raising the priority of coordinated transportation, p. 20
- Setting sunset review of council in 2007, p. 20

#### Recommendations to improve information and understanding

- Recommending more study on data gathering strategies, p. 21
- Creating information clearinghouse, p. 22
- Encouraging local clearinghouses, p. 22
- Providing technical assistance, p. 22
- Creating process for evaluating effects on specialized transportation, p. 23

#### Recommendations to increase efficiency in dealing with operational and financial issues

- Developing a standard eligibility screening tool, p. 23
- Supporting and funding training to raise awareness, p. 24

- Centralizing scheduling to minimize lost capacity, p. 24
- Clarifying roles and responsibilities, p. 24
- Developing cost-sharing models, p. 24
- Continuing funding for demonstration projects, p. 25

## **How were ACCT's recommendations developed?**

Stakeholders were enlisted — representing the full spectrum of programs and interest in transportation for people with special needs — to participate in several working groups that developed and provided the recommendations to ACCT. In addition, a statewide survey and a series of public meetings were held to get input from as many interested parties as possible.

## **Are there results from the demonstration projects?**

Chapter 5 describes the progress of the coordination projects funded by the Legislature. While the projects are not due to be completed until the end of the biennium, preliminary results suggest that improving coordination will produce significant benefits. The development of the projects also highlights the difficulty of the problems and some of the barriers that must be addressed.

## **Coordination will take time — but can be achieved**

ACCT's first year of experience as a council has reconfirmed the complexity of specialized transportation and its impact on a wide variety of stakeholders. The first year has also confirmed the resistance to change that

exists at the federal, state, and local levels.

Introducing and implementing changes to create an effective coordination program will take time and a lot of stakeholder interaction. Coordination, however, offers a significant opportunity to improve the efficiency and effectiveness of our specialized transportation delivery system. The full benefits will not be realized in one year, but ACCT's recommendations can put Washington State on the right path.



# 1

## What is the problem?

### **For some, transportation is a challenge — every day**

In the state of Washington many of our citizens face a daily challenge finding the transportation they need to connect to jobs, health care, training, services, and programs needed to keep them active and productive in our communities.

Every day most people get up, get dressed, visit with their families and head out the door. They go to jobs, schools, to shop or visit using cars, buses, ferries, or trains. They might be concerned about congestion, but they take their mobility — that is, their ability to get from one place to another — for granted. Every day.

Every day, however, thousands of others wake up, get dressed and begin to worry about accessing the basic services they need. They worry about getting a call through to schedule a trip, they worry about getting to their appointments on time. They worry about the weather, or their safety, as they wait for buses. They worry about connections and transfers over which they have no control. They might be able to get to the doctor, but how will they get to the store? Every day.

Others never venture outside their abodes, held captive there by a lack of access to services and activities. Some have a disability. Some lack transportation to look for work or to travel to it once they find a job. Some

can no longer drive due to age. Some are isolated from families and other support systems. While captive in their homes, vehicles with unused capacity are circulating right in their neighborhoods. Sometimes more than one. Because they are too young, too old, too poor, or not poor enough, they are not permitted to use those vehicles. Every day.

### **Why is specialized transportation such a challenge?**

Access to jobs, to services, to basic life activities such as shopping, recreating, and education, is a fundamental need. This need transcends jurisdictional boundaries and categorical programs. Access is the key to the opportunities available to the residents of Washington State.

### **Limited resources**

There are many reasons why specialized transportation services have not kept pace with needs of the people for which they were designed. The most obvious problem is limited resources. However, that constraint is more complex than it might appear, a complexity that frustrates both consumers and program managers.

Every year, state and local agencies spend millions of dollars to provide public, special needs, and pupil transportation services in the state. Yet many persons lack access to these services, or find the services inadequate.

## Categorical systems

Specialized transportation services are exceedingly complex due, in great part, to the categorical nature of their service delivery system — that is, delivery determined by eligibility and jurisdictional criteria. These categorical programs (such as senior transportation, Medicaid transportation, Americans with Disability Act transportation, pupil transportation) have caused duplication and fragmentation. They also create information and data gaps that in turn are the source of misunderstandings and conflicts.

Fragmentation has also created ambiguity in roles and responsibilities at all levels, and a confusing array of policies and procedures. Transportation funders, sponsors, and providers operate in an environment in which there are no consistent policies or understandings regarding their roles and responsibilities. Policy-making efforts have been local, and they vary from community to community.

## How are services currently provided?

A variety of organizations provide an unknown number of service hours and service miles every year. There are no consistent operating and service standards for these organizations.

Services are provided by a variety of equipment, including buses, vans, and automobiles. No overall maintenance standards are in place, nor is any agency responsible for ensuring that appropriate maintenance is done. Individual programs set their own standards.

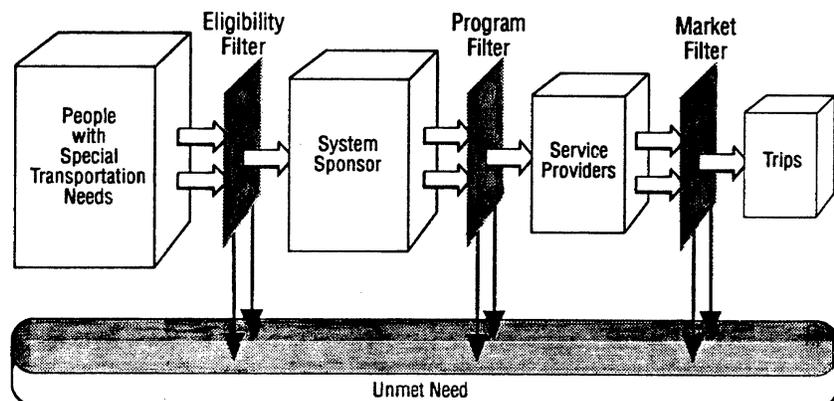
Service providers include a mix of local transit authorities, school districts, community-based organizations, and private companies and individuals. No plan or program exists to ensure that these organizations receive consistent and appropriate training. This means that some programs require high levels of training, while others programs do no training at all.

The size of the problem, alone, has frustrated and intimidated communities and organizations in their efforts to streamline the delivery system. In the meantime, customers and providers struggle to meet their needs.

## What is the current model for service delivery?

The current service model for transportation services in Washington State service (Figure 1) consists of three basic components: people, sponsors, and providers.

Figure 1  
Model of service delivery in Washington State



## What are the basic components of the service model?

People are the first component as they are the source of demand for transportation services. The box represents the general public, and within that general public are four groups comprising people with special needs. These four groups are persons with disabilities, persons too young to drive (children), persons too old to drive, and persons with low incomes/restricted resources.

The second component is the Sponsors; the agencies (found at the federal, state, and local level) that support a variety of programs that include transportation as an eligible use of funds. This includes most state agencies, local transit, school districts, counties and cities, and private organizations.

The last component is Providers; they are organizations found in local communities that operate services available to the public for transportation. These include transit authorities, school districts, community-based organizations (such as nonprofit organizations), private companies, and volunteers.

## How do the filters affect services?

The service model also includes three filters: eligibility, program, and market. These filters restrict the ability of persons needing transportation services, and they are responsible for much of the unmet need.

Eligibility filters derive from characteristics of the people needing transportation services. They include types of disabilities, age, and income status. A person may be too old or young, may have the wrong kind of

disability, or may have too many personal resources to be eligible for a particular program.

Program filters result from program rules and resource limitations. Types of trip purposes, issues of who pays for the service (that is payer of last resort), types of providers/equipment permitted, service area limitations, charging of fees/fares, lack of technical knowledge, and lack of priority for transportation all work to restrict the effectiveness of services provided.

Market filters include lack of capacity and local resources, inappropriate equipment, labor concerns, cultural issues, and lack of knowledge of effective service delivery models.

## Using transportation in Washington State

So this is how the transportation service model for Washington State works. If a person needing to travel has independent means for doing so (that is, has access to an automobile or fixed-route transit), that person can exercise his/her right to access goods and services available in the community. If that person lacks an independent resource, then he/she must meet certain eligibility requirements; must determine which, if any, program meets their needs; hope that program has resources available in their community for transportation, and that there is available an appropriate, ready and willing provider to meet their needs. If that person is unsuccessful, then their transportation needs will be unmet.

## Coordination provides a significant opportunity

Coordination presents a significant opportunity for improving the delivery

system for specialized transportation. Improved coordination, by itself, does not ensure that all persons with special needs will have full access to the goods and services they require. It does promise to make the system more efficient and effective.

### **Coordination is not the only answer — but it can aid in the effective use of resources**

Improved coordination will not increase resources, but it can result in better uses of the resources that are available. By limiting duplication, existing resources can be used more efficiently to meet additional needs.

### **Improving coordination will reduce complexity**

Improved coordination can reduce the complexity of the service delivery system. It can make the system more user friendly, reduce reporting and record keeping requirements and focus services where the need is greatest.

Improved coordination can provide a focal point for organizing and planning the delivery of services. Minimum standards can be developed to protect the public, common policies can be developed to streamline local operations, and accountability can be created for decision-makers concerned about the management of public resources.

### **Coordination efforts have a twenty-year history**

The Agency Council on Coordinated Transportation (ACCT) was formally created by the 1998 Legislature. But ACCT has its roots back in the 1970s.

Specialized transportation services emerged in the 1970s because social service programs realized they could not succeed if clients could not access their services. The current public transit infrastructure was not yet in place, so it was necessary to develop their own delivery systems.

### **Early efforts to coordinate**

Even in the 1970s, social service programs recognized the duplication resulting from their programs. Early efforts to coordinate relied on incentives in competing for federal and state grants. Some benefits were achieved as local organizations coordinated their transportation in a variety of ways.

It soon became apparent, however, that further coordination at the state and federal level was needed. Local providers were having to operate with conflicting policies and duplicated administrative requirements. State agencies undertook informal efforts to coordinate; one significant outcome in the 1980s was the development of the Medicaid Brokerage Program.

### **Studies emphasized need for more coordination**

The interest in coordination led to several formal studies, each of which recognized the need to establish a statewide forum to promote and develop improved coordination strategies and tools. Finally, a study undertaken by the Legislative Transportation Committee in 1996 succeeded in raising the awareness of coordination issues. This study led to an appropriation of \$ 1.0 million to the Department of Transportation to develop demonstration projects, and to the formation of ACCT.

## Emergence of ACCT

The emergence of ACCT was shaped by historical developments, by legislative leadership, and by stakeholder participation. During 1997, stakeholders met to discuss the makeup and purpose of ACCT.

Though ACCT was not officially formed until 1998, the Department of Transportation used the principles developed by the stakeholders to form an advisory council to assist in distributing and monitoring demonstration funds in 1997. Department of Transportation staff worked with ACCT to develop and use a request for proposals (RFP) process. The RFP was distributed statewide and thirteen applications were received and processed. Seven projects were approved by ACCT and contracts were developed and initiated.

### ACCT identifies barriers

With the start of the demonstration projects, ACCT turned its attention to other coordination issues. ACCT determined that its first step should be to identify the type and nature of the barriers affecting coordination efforts. Staff responded by developing a stakeholder mailing list and a written survey that was distributed to the list.

In addition, thirteen public meetings were scheduled throughout the state to solicit feedback about barriers. The following six types of barriers were identified:

- organizational/structural
- policy/regulatory
- operational
- information/data
- funding
- communications

### Barriers used to organize working groups

These barriers then became the basis for organizing three working groups consisting of stakeholder representatives. The three working groups were tasked with prioritizing the barriers and making recommendations to ACCT. (See Appendices for list of stakeholders participating on working groups.)

## What about federal constraints?

ACCT has a limited ability to change the federal structure that is responsible for much of the categorical nature of our delivery system.

ACCT will, however, advocate vigorously with federal programs to remove and reduce coordination barriers. The effectiveness of that advocacy will be strengthened by developing statewide coordination strategies and local coordination plans.



# 2 What are some key barriers to coordination?

Beginning in July 1998, three working groups made up of stakeholders spent three–four months analyzing and prioritizing the barriers to coordinated transportation. They took the results of the statewide survey and prioritized the lists to identify those barriers most critical to the process.

Chapter 2 summarizes the working groups’ conclusions, which are the basis for ACCT’s recommendations in Chapter 3, “A Vision of the Future.”

## A. No assignment of responsibility

Because of the categorical service delivery system (strongly influenced by federal funding), roles and responsibilities for coordinating transportation are unclear. Sometimes they conflict. No single organization is responsible for minimizing the duplication and inefficiency in the current system. No priority has been identified for coordinating the delivery of transportation services.

## Low funding priority

In fact, specialized transportation often has a low priority in competing for funding within program budgets. One cause for this is that responsibility for transportation services is often ambiguous or unclear.

## Resistance to change

In the absence of incentives to coordinate, fragmentation and turf issues proliferate. Program managers focus on the primary services they provide, often ignoring services needed for support. They often resist change because it may lessen their control and ability to provide services. When counterparts appear to be competing for the same limited resources, it is often difficult to foster cooperation between programs.

## Decision-making without regard for transportation impact

Because of the categorical service delivery system, programs make independent decisions about access, often without considering external impacts. Decisions about facility-siting and program development usually affect existing transportation systems, often in negative ways. Sometimes programs are developed and funded without considering access or its costs. When clients are unable to access the services being provided, programs are less likely to succeed. Other programs may also be affected as an unplanned result.

## B. Lack of information and understanding

There is a lack of understanding about the complexity, and interrelatedness, of transportation issues. Many programs

treat transportation access as a secondary issue. Insufficient information exists about met and unmet needs, existing resources, and methods and models for improving access.

Lacking good information and data, it is difficult to plan and program appropriate solutions. Communities and programs often lack the technology and technical expertise to design and implement coordinated transportation programs.

### C. Operational and financial issues

Providers in the transportation system face serious operational problems created by inconsistent funding and standards for eligibility. Managing multiple contracts with different reporting requirements, operating rules, and standards adds significant cost. Multiple contracts also create multiple points of contact for consumers and multiple points for scheduling and dispatch for providers. This multiplicity makes accountability difficult and encourages duplication and abuse of the system.

#### How do operational and financial issues impact services?

Here are some examples of the way operational and financial issues result in duplication, inefficiencies, and even abuse of the system:

- Under one program an individual might be eligible for *demand response service*<sup>2</sup>, while under

another they may be encouraged to use less expensive fixed-route transit.

- An individual, eligible under several programs, might book travel with each provider and choose to use the one that arrives first. For one or more other providers, this results in one or more *no shows*, that is, the client failing to appear for a scheduled pickup. These no shows have a cost and consume available capacity.
- Some individuals require 24-hour supervision. When unaccompanied on a vehicle, there must be someone at the destination to receive them. If no one is there, the provider must continue to carry them. This disrupts schedules and increases costs.
- Eligibility differences can result in multiple vehicles coming to the same locations—whether an individual residence or a congregate care facility—to pick up categorically eligible riders with common origins and destinations. This duplicates service and wastes existing capacity.
- Some programs limit use of their vehicles based on eligibility criteria. Some service contracts have exclusive use constraints. When rides are shared by different programs, no method exists for sharing the cost so as to reduce the expense for both sponsors in an equitable way.

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<sup>2</sup> Demand response service is characterized by flexible scheduling and routing. Unlike fixed route service, demand response service deviates according to the needs of a group of users on a particular day.

# 3

## A vision for the future

### What does ACCT mean by *coordinated transportation*?

Coordinated transportation for people with special needs is developed through a collaborative community process involving transportation providers; human service programs and agencies; consumers; social, educational and health service providers; employer and business representatives; and other affected parties. It is developed for the purpose of improving transportation efficiency and effectiveness. It maximizes the use of community transportation resources so that more people can be served within available funding levels.

### What would a coordinated system look like?

A coordinated transportation system exhibits the following characteristics:

- Each program or agency serving the special needs population shares responsibility for ensuring that its customers can access services.
- There is a single entry process (or minimal entry points) for customers to use to have trips arranged and scheduled, so that the customer does not have to contact different locations based on which sponsoring agency/program is paying for the trip.
- A process is in place so that when decisions are made on facility siting or program policy implementation, the costs of transportation and the potential effects on the transportation costs of another agency or program are considered. Others are given an opportunity to influence the decision if the potential impact is negative.
- Open local market mechanisms permit all providers who meet minimum standards to participate in the program and, in addition, allow for cost comparisons so that purchasers can select the least expensive trip suitable to the customer's needs.
- There is flexibility in using the available vehicles in a community so that the ability to transport people is not restricted by categorical claims to vehicles.
- There is maximum sharing of operating facilities and administrative services, to avoid duplication of costly program elements.
- Trip sponsors and service providers have agreed on a process for allocating costs and billing when they share use of vehicles.
- Minimum standards exist for (at least) safety, driver training, maintenance, vehicles and technology to eliminate barriers that may prevent sponsors from using each other's vehicles or serving each other's clients.

- The system is user-friendly. The fact that the system is supported by a multitude of programs and agencies with different eligibility, contracting, service delivery, payment and funding structures does not affect the customer's ability to access services.
- Support is provided for research, technology improvements and sharing of best practices from other communities, so that the system can be continually improved.
- There are performance goals and evaluation processes which lead to continuous system improvement.

# 4 An action plan — the recommendations

To improve the delivery of specialized transportation through the use of coordination, ACCT proposes a mix of immediate actions, stakeholder discussions, and demonstration projects.

Chapter 4 describes an action plan implementing the vision for a coordinated system.

## A. Assign responsibility

The working groups' recommendations recognize the need for state leadership while strongly emphasizing local control and participation.

### Recommendation addressing the need for state leadership

It is proposed that the lead organization be the Agency Council on Coordinated Transportation (ACCT). ACCT will be directly accountable to the Governor and the Legislature for advocating, planning, implementing and monitoring the state's coordination program for specialized transportation.

### Membership structure

ACCT will have nine voting Council members appointed by the Governor and eight voting members from the Legislature. Every two years the Council will elect a Chair and Vice-chair from among the three permanent members.

### Permanent members

- Secretary of the Department of Transportation, or designee
- Secretary of the Department of Social and Health Services, or designee
- Superintendent of Public Instruction, or designee

### Rotating members

Six members will be appointed by the Governor for a period of three years, their terms to be staggered so that two of the members are replaced or renewed every year. The term of membership is renewable but no rotating member may serve more than six consecutive years.

The members will represent a balance of providers and consumers, such as:

- The Washington State Transit Association.
- The Community Transportation Association of the Northwest.
- The Washington Association of Pupil Transportation.
- The Washington Senior Lobby.
- The Governor's Committee on Disability Issues and Employment.
- The Governor's Office.

### Legislative members

In addition, eight members from the Legislature will sit on ACCT, representing the two largest caucuses from each of these committees: Senate Transportation Committee, Senate Ways

and Means Committee, House Transportation Policy and Budget Committee, House Appropriations Committee.

### Recommendation creating accountability

✎ It is proposed that ACCT implement the state's coordination program for specialized transportation in accordance with RCW 47.06B, as amended.

### How will ACCT ensure implementation?

To ensure implementation, ACCT, in collaboration with stakeholders, will:

- Develop guidelines for local planning of coordinated transportation in accordance with RCW 47.06B.
- Initiate local planning processes by contacting the board of commissioners and county councils in each county and each federally recognized tribe and informing them of their obligation (per statute) to convene local planning forums for the purpose of coordinating transportation at the community level.
- Work with local community forums to identify a local lead organization.
- Provide a forum at the state level at which state agencies will discuss and resolve coordination issues and program policy issues which may impact transportation coordination and costs.
- Develop guidelines for state agencies to use in creating their own policies, rules or procedures to encourage the participation of their constituents in community-based planning and coordination, in accordance with

RCW 47.06B, as amended. State agencies refers to those agencies that:

- a) have clients who need transportation;
  - b) are paying for client transportation; and/or
  - c) are providing client transportation.
- Facilitate state level discussion and action on problems and barriers identified by the local forums that can only be resolved at the state level.
  - Develop and test models for determining the impacts of facility-siting and program policy decisions on transportation costs.
  - Develop methodologies and provide support to local and state agencies in identifying transportation costs.
  - Develop guidelines for setting performance measures and evaluating performance.
  - Develop monitoring reporting criteria and process to assess level of compliance with RCW 47.06B.
  - Administer and manage grant funds to develop, test, and facilitate the implementation of coordinated systems.
  - Develop minimum standards for safety, driver training, and vehicles, and models for technology to support coordinated service delivery systems.
  - Provide a clearinghouse for sharing information about transportation coordination best practices and experiences.
  - Promote research and development of methods and tools to improve the performance of transportation coordination in the state.

- Provide technical assistance and support to communities.
- Facilitate, monitor, provide funding as available and give technical support to local planning processes.
- Form, convene and give staff support to stakeholder work groups as needed to continue work on removing barriers to coordinated transportation.
- Advocate for the coordination of specialized transportation at the federal, state and local level.
- Report progress to the Governor and Legislature.



*A People for People driver assists a client. Faced with a lack of dependable transportation for clients with special needs, People for People is using its ACCT funds to lead the coordination of specialized transportation in rural Yakima County.*

### Recommendation emphasizing local control

It is proposed that at the local level, county governments convene local planning forums and invite all parties, including tribal governments, who serve or transport special needs clients.

Counties will be encouraged to coordinate and combine their forums and planning processes with other counties and tribes, as they find it appropriate.

### What are local responsibilities?

Local responsibilities include:

- Identifying a lead organization to facilitate the local process.
- Identifying functional boundaries for the local coordinated transportation system.
- Clarifying roles and responsibilities of the various participants.
- Identifying community resources and needs.
- Preparing a plan for developing a coordinated transportation system that meets the intent of statute,

addresses community needs and efficiently uses community resources.

- Implementing the community coordinated transportation plan.
- Developing performance measures meeting ACCT guidelines.
- Developing a reporting process that meets ACCT guidelines.
- Raising issues and barriers to ACCT when resolution is needed at the state level.
- Developing a process for open discussion and input on local policy and facility-siting decisions that may have an impact on the specialized transportation costs and service delivery of other programs and agencies in the community.

### Recommendation for funding to support coordination efforts

It is proposed that ACCT receive biennial appropriations sufficient to carry out the work program.

### What would ACCT do with funding?

ACCT would use the proposed funding to:

1. Administer the specialized transportation coordination program.
2. Provide funding to the community forums through their designated lead agency for the purpose of implementing their community process.
3. Provide and manage grants to fund demonstration projects in communities which have implemented coordination planning processes in accordance with RCW 47.06B, as amended.

### Recommendation to raise the priority of coordinated transportation

✎ It is proposed that RCW 47.06B be amended to implement the intent of the Legislature to support a state specialized transportation coordination system and to define the new responsibilities of ACCT and the local forums based on the principles proposed in this document.

### Recommendation setting sunset review for the Council

✎ It is proposed that ACCT be subject to sunset review in 2007.

## B. Improve information and understanding

This section presents a series of recommendations designed to improve information and understanding of transportation for people with special needs.

## Why bother getting better information?

Stakeholder discussions in the working groups kept circling back to this fundamental question: why do we need better information? Given the inevitable resistance to increased reporting as well as the reality of current reporting that may not be productive, why bother gathering information about transportation costs and capacity?

### Good information will have many uses

Here's why better information is worth investing in:

- To respond to the Legislature's directive for better reporting.
- To support local communities in effective planning.
- To establish a baseline against which gains in productivity may be measured.
- To be able to document and share best practices.
- To give transportation providers what they need to plan and to meet needs created by new programs, for example, Work First.
- To better target services and resources to meet customer needs.
- To raise agencies' awareness of the transportation effects and costs created by their programs.
- To increase awareness of the magnitude of the issues and the benefits of providing transportation to special needs populations.

## Gathering information on data and costs

New reporting will consist of two elements: data — describing

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*The coordinated efforts of Yakima Valley College, DSHS, and People for People Transportation enabled all participants who completed our project to begin employment.* ”

— Rob Frederico,  
WorkFirst Coordinator at  
Yakima Valley College

performance, resources, capacity, and target clientele — and costs.

### Recommendation regarding data collection

☛ It is proposed that ACCT will continue to work on developing a more detailed proposal for gathering data. Decisions regarding data collection will be made with stakeholder and agency input, based on the results of the following tasks:

1. Identify the data and financial information ACCT and local community planning forums need to manage a specialized transportation coordination program.
2. Inventory existing reporting systems and the type of data they produce.
3. Determine whether this information is adequate to meet the needs of the specialized transportation coordination program.
4. If there are data gaps that need to be filled, ACCT will propose a data gathering system and provide funding for it.

### New process to be as compatible as possible

Care will be taken to minimize the impact of any new reporting requirements by making the new process as compatible as possible with existing reporting requirements.

### Improving the sharing of information

In addition to improving information related to expenditures, capacity, and performance, the process of sharing information needs to be improved. Every program serving people with special needs has an inherent effect on

specialized transportation. By improving communication, including creating a forum for discussion, agencies and communities can improve their planning and effective use of resources.

### Recommendation for lead organization to create an information clearinghouse

☛ It is proposed that ACCT will create an information clearinghouse providing tools and information necessary for local coordination efforts to succeed.

The clearinghouse will:

- Create an inventory of best coordination practices at federal, state, and local levels.
- Distribute cost accounting, reporting, and data gathering models, once developed, to state and local agencies.
- Share data gathered in plans and reports.
- Prevent duplication and waste of resources by tracking the success of projects locally as well as in other states.
- Use the most cost-effective techniques for gathering and disseminating information, based on other clearinghouse models.
- Continue getting feedback from customers as to their information needs and preferences on how to receive information.

### Recommendation for local clearinghouse

☛ It is proposed that ACCT will encourage communities to develop a local clearinghouse of specialized transportation resources, providing centralized local information, better

choices for riders, centralized scheduling, and options for local shared billing and reimbursement.

### Recommendation providing technical assistance

➡ It is proposed that ACCT's information clearinghouse will make technical specialists available to communities. These specialists will be drawn from ACCT staff, state agencies, and local communities.

In support of the clearinghouse, the technical specialists will:

- Identify, encourage and support peer-to-peer support, including the practice of on-loan staff.
- Facilitate the development and implementation of local coordinated transportation plans.
- Offer guidance with cost accounting, data collection, and reporting.
- Train local lead personnel.

### Recommendation to create a process for evaluating impacts on transportation

➡ It is proposed that ACCT will develop a process whereby state and local agencies consider the effects on specialized transportation costs and service delivery when planning and redesigning programs and siting facilities.

## C. Deal more effectively with operational and financial issues

To address the specific problems created by operational and financial issues, the

working groups have developed a series of strategies. This section describes strategies recognizing existing constraints—and exploring ways to work more effectively within them. The section also describes some of the potential ACCT demonstration projects.

### Recommendation to encourage more appropriate use of service

➡ Develop a standard eligibility screening tool.

A screening tool that focuses on an individual's functionality, not program participation, will encourage more efficient and appropriate use of service.

Currently, an individual may be eligible for demand response service under one program, while under another program they may successfully use less expensive fixed-route transit. To the extent possible within federal program constraints, the new screening tool would connect an individual with the most appropriate services based on transportation needs and level of function.

### Recommendation to raise level of awareness

➡ It is proposed that ACCT support and fund training programs for individuals using services, as well as for vehicle operators, customer services, case workers, advocates, brokers, and others.

In addition, raising the level of awareness of transportation services will aid in the identification of appropriate services to be used by individuals.

### Recommendation to minimize lost capacity

➡ It is proposed that ACCT encourage centralized scheduling

for trips at the community level to discourage the number of no-shows due to multiple bookings. No show-policies should be developed and enforced to discourage abuse of services. State agency-level policies and programs should support rider standards that discourage abuse or misuse of services.

In addition to reducing duplication, this recommendation will reduce costs and waste of capacity by preventing the practice of booking with more than one provider and using the one that arrives first.

#### Recommendation to clarify roles and responsibilities

It is proposed that ACCT define the role of the transportation provider and the responsibility of the rider/user and/or program/advocate.

This recommendation addresses problems around individuals requiring 24-hour supervision who are sent unaccompanied on vehicles, raising standard-of-care and liability issues. In addition, when no one is there to receive them at their destination, drivers must continue to carry them, disrupting schedules and increasing costs.

This recommendation would increase safety for riders and vehicle operators, as well as raising awareness of the effects of programs.

#### Recommendation to encourage fair allocation of costs

It is proposed that ACCT develop one or more cost-sharing models which are equitable for sponsors and easy to implement and track.

This strategy will create agreement between funders and regulatory agencies about how payments will occur when vehicles are shared.

#### Recommendation to continue funding for demonstration projects

It is proposed that ACCT continue to fund demonstration projects testing elements of the vision of coordinated transportation.

The working groups propose a number of innovative elements which could be tested separately or in combination in demonstration projects.

#### Potential demonstration projects

Some potential ACCT demonstration projects:

- Develop community forums to organize resources and develop a regional plan for coordinating specialized transportation.
- A centralized scheduling operation using a common service standard for all participating agencies.
- Working through state-sponsored social service agencies to establish a personal care attendant (PCA)/volunteer program for individuals needing 24-hour care. This project would clarify the roles of the transportation providers, the programs, and the clients.
- Applying a cost-sharing formula to a specific population/facility while incorporating incentives for coordinating trip.



*A Ranier Beach High School student laces up his new work boots. With ACCT funding, the Partnerships for Coordinated Transportation Project transports at risk students to work and training sites as part of an exciting skilled-trades internship project.*

# 5 ACCT's demonstration projects — what have we learned?

The 1997 Legislature appropriated one million dollars to the Department of Transportation to fund demonstration projects aimed at improving transportation coordination. The department formed an advisory committee based on the principles of ACCT to assist in selecting those projects. The committee developed and implemented a process for soliciting, evaluating and funding appropriate projects. Six contracts were signed and projects began in early 1998.

Based in both urban and rural areas, the projects approach the challenges of coordination in different ways. Each project is at a different stage of development; all projects will conclude at the end of the 1997–1998 biennium.

## Summary of projects

This chapter summarizes the progress of seven ACCT projects:

- King County Agency ACCESS Project
- Partnerships for Coordinated Transportation
- King County addVANtage Plus
- Transportation Assistance Program
- People for People, Yakima County
- Mason Transit
- Olympic Area Agency on Aging

How much funding did each project receive?

Funding for each of the seven projects is summarized in Table 1 below.

Table 1. Funding for ACCT demonstration projects 1997–1999

	ACCT funding	Local match	Total
King County Agency ACCESS Project	\$135,090	\$93,875	\$228,965
Partnerships for Coordinated Transportation	150,000	120,000	270,000
King County addVANtage Plus	83,784	45,115	128,899
Transportation Assistance Program	160,000	158,750	318,750
People for People, Yakima County	243,431	0	243,431
Mason Transit	54,410	36,229	90,639
Olympic Area Agency on Aging	125,000	39,500	164,500

*This table shows how ACCT distributed the \$1,000,000 the 1997 Legislature appropriated for demonstration projects. Amounts of local matching funds are also shown.*

## **King County Agency ACCESS Project tackles technology barriers**

### **What was the problem?**

In 1992, King County Metro (Metro) and the Washington State Department of Social and Health Services (DSHS) agreed to consider coordinating their efforts to provide specialized transportation services in King County. Metro was responsible for providing complementary paratransit services to be in compliance with the Americans with Disabilities Act (ADA). DSHS was responsible for providing access to appropriate medical services for persons eligible for Medicaid. DSHS had earlier developed a statewide brokerage system, and Metro was interested in creating a brokered service for its ADA program to be named *ACCESS*.

Facilitated by WSDOT, representatives from DSHS and Metro met to explore possible coordination strategies. The result of the negotiation that occurred was an agreement to contract with a single broker for the county, but to develop separate operating agreements to be brokered by that single entity. After going through a jointly-designed competitive process, the Multi-Service Centers of North and East King County (MSC) was selected.

That arrangement proved challenging to implement, but has been in operation for several years. Differences in operating policies and contracts created duplication on the administrative side, and resulted in separate operating agreements with service providers. One outcome is that the demand for services is not efficiently distributed to existing routes and trip capacities. Each agency is unable to take advantage of existing

routes and capacities available with the other.

The question resulting from this is: can the operating and administrative differences in the two programs be addressed so that trips can be more efficiently scheduled and dispatched using both agency programs?

### **What strategy was proposed to address the problem?**

Metro and DSHS proposed creating a technical team (including MSC) to identify and resolve existing barriers. Technology was one key to the problem. Both DSHS and Metro used the same scheduling/dispatch software, but the internal parameters that had been developed to meet each program's specifications created barriers. This would necessitate a collaborative investigation of the software parameters and the operating policies that created them. The problem would be complex, because incremental changes to programming could create unforeseen outcomes. The team would pursue coordination on two levels. The manual level would look for obvious examples where duplication, or shared use opportunities could be found. These situations would be identified, and coordinated solutions would be introduced immediately. The second level would require significant technical analysis of the software and operating procedures, and considerable testing before implementing any changes.

### **Software barriers — and solutions to them**

Because of the different operating and contract requirements, MSC operates two versions of the software. Initial barriers addressed allow the manual coordination of service. These include:

- One of the first barriers identified was that the two versions operate on different drives, thereby making it difficult for DSHS and Metro call takers to know what each other were doing. A temporary solution was introduced whereby call takers were trained on both systems. A long term, technical solution is being developed by the software maker that will provide call takers access to both drives.
- A second problem involved different methods for tracking trips. New trip codes have been developed to address this issue.
- A third example concerns billing issues related to tracking and allocating costs from one program to another. A permanent solution has not been developed, but a temporary agreement is in place that sets per trip and hourly rates.

## Barriers still to be resolved

The King County ACCESS project has a number of significant barriers yet to be resolved. These barriers include:

### Confidentiality

Confidentiality rules create barriers to internal communication. Some of the problem results from administrative applications, but others may prove problematic as they may come from federal and state law.

### Drug and alcohol testing

Federal requirements for drug and alcohol testing vary from agency to agency. Their requirement may also remove some providers from the available list of service vendors. Application to taxi companies, for example, may result in their withdrawal as a service provider, reducing available capacity.

## Cost allocation

A temporary arrangement for allocating costs for shared-use vehicles has been negotiated to permit the project to go forward. A long-term agreement needs to be designed that fairly distributes costs back to the program sponsors when riders from both agencies share the same vehicle. Ideally, the process will allow expanding the coordination opportunities to other program sponsors not presently participating.

## Project performance

Despite the technical complexity of the King County Agency ACCESS Project, a number of positive benefits have been measured and reported. Project staff analyzed the performance of the DSHS program and identified the fifty highest cost riders. From that list, two program destinations were selected. A group of riders was selected from that list and were rescheduled using existing Metro routes. The riders were traveling individually five days a week, and were costing the DSHS program \$290 a day. By consolidating and grouping these trips with a Metro provider, the cost was reduced to \$63 a day. This represents a savings of \$227 a day; and, assuming 255 days a year, an annual savings of \$57, 885, or about 3,000 additional rides.

A second test is underway involving a group of *Access* riders. These riders make long trips that necessitate vehicle-to-vehicle transfers to complete. The trip is difficult for the riders, and consumes valuable capacity within the Metro program.

These trips are currently being provided with DSHS providers who can provide direct service. This test is relatively new and data is not yet available regarding capacity and cost savings benefits.

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“

*We have now experienced how wonderful it has been to combine the two rider programs and we don't want to go back. In the past some of our medically frail clients rode vans in the morning or evening up to 1 1/2 hours. With this coordination project, caregivers have called us to thank us for getting their loved ones picked up later in the morning or home earlier at night.*

”

— Colleen McDonald,  
ElderHealth Northwest –  
Connection Program

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A third benefit is the consolidation of late-night scheduling and services. DSHS provides 24-hour services for kidney dialysis patients (dialysis is scheduled 24 hours a day due to demand), and Metro provides limited late night service, as well. It has been agreed to consolidate this DSHS activity with the Metro late-night operator, who now can schedule DSHS trips. The current cost had been about \$540 per week, and the projected, new cost is \$63 per week. This means a potential \$24,804 saved in a year that can be converted to about 1,300 more trips.

**Project has modeled potential savings**

In addition to actual implementation, the project has also modeled potential savings that could result from further coordination of services. The results of that analysis are shown in Table 2. The savings predicted by the model could mean as many as 60,000 additional trips provided within current program costs and capacity.

**Summary**

The goal of the King County Agency ACCESS Project is to better integrate the dispatching and scheduling functions performed by two separate programs. The key to accomplishing this task is to resolve program and policy differences and translate those changes into modifications to the technology used to support both programs. This problem is complex, but good progress is being made. A manual review has found several opportunities for integrating services that have proved successful. Preliminary modeling, based on data from the two systems, promises even greater reward in terms of creating additional capacity within existing program resources.

Table 2. Predicted savings for the King County Access project		
	Uncoordinated	Coordinated
Scheduled Routes	286	283
Routed Trips	4,093	4,620
Service Hours	2,273	2,026
Other Trips	917	390
Total Trips	5,010	5,010
Cost/Trip	\$18.92	\$18.02
Total Cost	\$94,787	\$90,296

*This model shows predicted savings for the King County Access project — which could mean as many as 60,000 additional trips provided within current program costs and capacity.*

## Partnerships for Coordinated Transportation

The advent of welfare reform has drawn attention to the importance of connecting low income job seekers with employment opportunities.

### What was the problem?

The following issues create problems for systems in meeting the needs of low income job seekers:

- The spatial disconnect resulting from many of the unemployed living in central city locations while jobs are being created in the suburbs.
- Many jobs are shift work with openings at times not served by the available public system.
- Welfare clients have few resources to purchase or acquire reliable transportation.
- Welfare clients have a variety of barriers to overcome including cultural, financial, problematic (i.e., no drivers licenses), and a variety of disabilities.
- Welfare clients and case workers have limited knowledge of alternative transportation modes such as carpools and vanpools.
- Welfare clients have child care issues.

### What strategy was proposed to address the problem?

The King County Department of Transportation (Metro) has created the Partnership for Coordinated Transportation involving a number of

local agencies having key roles in helping welfare clients train for, find, and keep productive jobs. The Partnership will develop and coordinate transportation services aimed at placing low income persons in training and employment opportunities.

The process includes screening clients for eligibility and needs, contracting with social service agencies and private employers in the community, and arranging transitional transportation services. In addition, a child transportation service is being designed and tested. Solutions include a mix of education, fare subsidies, and other alternative arrangements to meet the needs of the clients.

### Implementing the projects

To begin the project, a number of projects were identified and contracts were and are being negotiated. These projects are at various stages of development and implementation.

#### Holly Park Community Van Project

The Holly Park Community Council owns a van that is used to take welfare clients from the housing site to employment in Kent, SeaTac, and Seattle. The partnership provides funding and service is provided for trips at off hours and to child care centers.

The project has assessed the needs for ten clients to date. Two residents were transported to the Oberto plant in Kent and were transitioned to a carpool and a vanpool. In addition, three residents were transported to jobs with the Madison Hotel and five to the Marriott Hotel. To date, seven children have been carried to child care. Recently an additional person has been transported to the Triam Healthcare Center.

“

*Before, I rode to work in my friend's car; now he has a new job. I have to depend on the Holly Park Vanpool. I get out of work at 2:30 a.m. and there is no public transportation at that hour. If there is no vanpool, I have to quit my job.*

”

— Heang Mao,  
Holly Park resident

“

***Port JOBS is one of the partners in C-WEST, an exciting school-to-work program for at-risk students. However, we were unprepared for the substantial costs of transporting students to apprenticeship centers and work sites. The matching funds we received through the Partners for Coordinated Transportation Project are critical to the success of this skilled trades internship program.***

”

— Susan Wilder Crane,  
Port of Seattle

### Park Lake Homes

This project just started in November. A community van will be provided to the housing site, and will be supplemented by subsidized transit passes for welfare clients. The Partnership will share in providing the subsidies.

### ANEW

This is another new project that began in November. The object is to provide community van service to a minimum of 30 welfare clients residing in housing projects in West Seattle, Rainier Valley, and Yesler Terrace to construction training and employment in Renton at the Career Development Center. The ANEW Project had been leasing a vehicle from other sources at two to three times the cost of the Metro lease arrangement.

### Career Exploration in Skilled Trades Internship Program

This project began this fall and its purpose is to provide transportation for 40 “at risk” students from Rainier Beach High School. It involves the use of a van and subsidized bus tickets to provide transportation to work/training sites in the Duwamish Industrial area.

### Seattle Jobs Initiative

This is another project for which the contract was recently signed. The project will get underway in November. It consists of the purchase of bus passes for clients to transport them to training and employment sites. One purpose of the project to determine an appropriate subsidy level for the passes. Participants will be surveyed to assist in accomplishing this.

### Genie Industries

This project is only in the proposal stage as it has just recently surfaced as a

possibility. Genie Industries plans to hire 700 employees at their Redmond site in 1999. They have been working with Shoreline Community College to train 235 welfare clients for possible employment at their facility. The City of Redmond recently developed their R-Trip Program that provides funds for employer transportation programs in association with Metro services. The City of Redmond and Metro have agreed to design a program for Genie Industries that includes vouchers for several of Metro’s ridesharing and commuter programs.

### Partnerships — a success for the project

Perhaps the most significant success has been the creation of the partnership. It brought together a great diversity of agencies and stakeholders, agencies that did not often interact previously. Participants included the two biggest housing authorities, the Private Industry Council, school districts, state agencies, the Port of Seattle, local governments, and private employers. Their participation has, in many cases, included funding. The full benefit of this process is yet to be determined.

### Barriers

A number of barriers were encountered in the development of the projects currently being implemented. In addition, some barriers held up the implementation of other projects.

#### 1. Belltown Community Services Office

The goal of this project was to provide transit passes to low income clients eligible for the General Assistance Unemployed (GAU) program. These clients are not eligible for WorkFirst and do not receive transportation assistance from GAU. The purpose of the project was

to arrange transportation to a training/employment program using bus passes.

This project has not succeeded because Belltown has been unable to find matching funds, despite the availability of funds for WorkFirst and other programs with similar objectives. Client eligibility is the barrier.

## 2. Eddie Bauer

Negotiations have been underway for several months with the Eddie Bauer Company. The goal was to provide transportation to a remote employment site for welfare clients using subsidized ride sharing and bus passes. Two separate contracts were proposed during negotiations, both requiring a match from Eddie Bauer. The local office of Eddie Bauer was unable to get corporate buy-off on the project, so it was discontinued.

## 3. Administrative complexities

Perhaps the most frustrating barrier to progress has been the amount of time and effort it has taken to negotiate agreements between participants and project partners. The complexities and requirements of both the public and private sectors create the lengthy, repeated reviews and negotiations over issues such as risk management, payments, and reporting systems.

## 4. Child transportation

This is a key issues for welfare clients. The requirements are fairly complicated and governed both at the federal and state levels by a variety of agencies. The problem is further exacerbated by the different interpretations of risk managers, transportation professionals, and legal representatives.

## 5. Transportation funds

The problem of eligibility was already discussed in relation to the Belltown Project. A second problem arises from the short transitional period for most welfare clients. Typically, only one month is provided as they adapt to their new jobs. Transportation can be expensive, and that cost can be a barrier to retaining people in new employment situations.

## 6. Lack of operators

Some of the community programs lacked qualified operators for the vehicles they wanted to use in transporting clients to work and training. This might seem ironic given the desire to find jobs and place clients in them, but potential operators must meet certain criteria to drive the vehicles. Metro could not contract for the operators directly because of its existing labor agreements, therefore the responsibility was placed with partnering agencies. These issues were worked out, but did take some time to be accomplished.

## **Performance report for Holly Park project**

The Holly Park Project was the first to begin operations, and they have reported on their early performance. The fully-allocated costs per trip have varied from month to month. Initial start up costs account for the July totals, and fluctuating participation explain the changes from August to September as two persons were moved to a carpool and a vanpool. Table 3 provides a summary.

Table 3. Holly Park's performance July-September 1998

	July	August	September	Total
Cost	\$1670	\$2068	\$1176	\$5514
Trips	46	235	167	448
Cost/Trip	\$36.30	\$8.80	\$10.63	\$12.31

*A performance summary for the Holly Park demonstration project showing the change in cost per trip July-September 1998.*

The real promise of the Partnerships for Coordination Project can be measured by the number of placements it has facilitated. With the Holly Park project, ten adults have been able to find and access jobs, and seven children are being transported to child care. At Rainier Beach High School, eighteen students are receiving valuable job training this semester, with the promise of an equal number having the opportunity next semester.

Partnerships for Coordinated Transportation's other projects are just getting underway, but the number of

potential placements already looks promising, particularly considering the clients are the persons most at risk with the fewest resources.

### Summary

The Partnerships for Coordinated Transportation project is a challenge because it is, in effect, a series of small projects. WorkFirst and welfare reform simply will not succeed if participants are unable to access new jobs. But, as was noted, a number of barriers must be overcome and these vary from situation to situation.

Traditional fixed route transit can provide some assistance, but creativity with fare media and alternative modes is essential to success. The key to Partnerships for Coordinated Transportation has been the partnership that has worked to identify and then solve the problems. The project has been slow to develop as a series of projects and their contracts needed to be designed and implemented. The promise of success is there, the measurement of that success will be understated. The number of job placements can be tracked, but the impact of finding jobs and creating financial independence for the participants will not be easily measured.



*A Holly Park resident secures her child in a van provided by King County Metro's Partnership for Coordinated Transportation.*

## King County addVANtage Plus works with community- based organizations

### What was the problem?

The continuing growth in demand for ADA complementary paratransit service has made it increasingly difficult for transit systems to respond to other community needs. In concert with the availability and growth of transit agency ADA paratransit service, the number and capacities of local, community-based providers have been declining. Categorical funding of social services without provision of dedicated transportation funding has created pressure to forego program-focused transportation solutions in order to offer additional primary services.

### Difficulties providing service to non-ADA, special needs clients

The result is that community-based organizations (CBOs) are having increasing difficulties in providing access for their non-ADA eligible clients with special transportation needs to their services. Low-income individuals, seniors who are able to ride regular transit service but for whom transit service is limited or difficult to use, and children are populations who fall through the cracks in gaining access to CBO based services.

### What strategy was proposed to address the problem?

King County Metro proposed changes in King County policy that would further limit high-cost ADA paratransit services to those who are most in need of such services, to increase the integration of paratransit services with other



*Seniors and children share transportation to a nutrition program provided by Asian Counseling and Referral Services (addVANtage Plus project).*

transportation modes, and to create community-based transportation solutions that provide flexibility, lower costs and partnerships with community-based organizations. The planned community-based strategies include the provision of vehicles and other resources to CBOs and the support of volunteer recruitment and management efforts.

To meet the increasing access needs of CBOs, while continuing to meet their ADA obligations, a plan was developed to make additional vehicles available within communities. A program called addVANtage Plus was proposed and developed through which surplus vehicles were provided to CBOs to support their program access needs. Partnerships would be developed, through which the CBOs would be given operational control over the vehicles, and the vehicles would become part of the larger, regional network. In return for having the vehicles to meet their immediate program needs, these

“  
*The addVANtage Plus van has been a tremendous asset to our elder nutrition program. Seniors are coming to the site, and it's really nice to be able to serve seniors and youth coming and going together. They all really appreciate the service.*

”

— Elsa Valle,  
Asian Counseling and  
Referral Services (ACRS)

vehicles would also be available to the regional brokerage operation when capacity or time was available. This would free up capacity on the *ACCESS* program for additional ADA trips, while reducing access costs for the CBOs.

Two CBOs were selected for this project: Asian Counseling and Referral Services (ACRS) and the Maple Valley Community Center (MVCC). King County Metro negotiated agreements with both CBOs at the onset of the project.

### **How has King County addVANtage Plus succeeded?**

King County addVANtage Plus has succeeded in getting participating CBOs to recognize that they have a role to play. The CBOs are accepting responsibility for making the transportation system more efficient and effective. This has resulted in a number of improvements:

- The participating CBOs have increased the availability of transportation to youth, non-English speaking cultural minorities, and rural populations. These are groups with transportation issues outside of ADA consideration, for whom access to programs and services is a problem.
- Rider referrals from Metro's paratransit broker to one of the CBOs' vehicles, which has created capacity within the *ACCESS* Program.

The preliminary results of the project reinforce the concurrent success of similar efforts initiated directly by Metro with other CBOs in King County. The early results support the predicted outcomes of Metro's policy initiatives.

### **Barriers**

King County addVANtage Plus still faces a number of serious challenges:

- The need to identify funding streams to support CBO operating costs. Transportation is not a priority item for many program funding streams and available funds are limited to support vehicle operations.
- The high cost of insurance and CBO concern with liability issues
- Limited availability of volunteer drivers available to CBOs to operate the vehicles. The lack of volunteers could reduce or eliminate the availability of transportation services provided by CBOs. Using paid drivers would significantly increase costs.

### **Project performance**

While data for the project to date is still incomplete, some basic performance indicators suggest the positive benefits that can be expected. For example, the productivity on the ACRS program is estimated to be 3 riders per hour which compares very favorably to the current 1.64 riders per hour for *ACCESS*. Preliminary data indicates about 48 percent of the ACRS rides have been provided to persons registered with King County Metro. There are others riding who are also eligible, but who have not been registered. This number is not yet known.

Quarterly ridership has been steadily increasing with a total of 9990 rides reported to date. The average cost has been \$ 5.65 per ride, a number that decreases to \$ 4.29 per ride if home delivered meals are included in the total. This represents about \$ 27,357 in savings to King County Metro that have been reinvested into other rides.

The MVCC project was slower starting and has produced 514 trips to date, but is showing ridership growth. Approximately 20 percent of the riders are registered with King County Metro. Average costs have been \$ 21.97 per trip, which is only slightly lower than the trip cost with the ACCESS Program. This is explained, in part, because most of the trips are rural, covering longer distances, and have higher costs than urban and suburban trips. The late start up is another factor, as productivity will increase as information about the service becomes more available and more people use it. The estimated savings to date totals \$2,246.

created involve those CBOs in the regions transportation system and gives them a greater ownership in its performance. The capacity that the CBOs support, in turn, can then be integrated into that regional system. By sharing responsibility and defining roles, the overall regional system can operate more efficiently and effectively. This project provides an effective model for accomplishing that regional goal.

Table 4 briefly summarizes the two projects' performances to date.

Table 4. Performance summary for two King County addVANtage Plus projects		
	ACRS	MVCC
Total Rides	9990	514
Cost/Trip	\$ 5.65	\$ 21.97
Cost Savings	\$ 27,357	\$ 2,246

This table summarizes early performance for two of the King County addVANtage Plus projects: Asian Counseling and Referral Services (ACRS) and the Maple Valley Community Center (MVCC).

## Summary

Over the last few years, there has been an erosion of community-based transportation services. This has been due to a reliance on the formal transit system and also due to competing priorities for existing program funds. This project seeks to expand capacity in the community by supporting transportation services provided by CBOs. The partnerships that are being

## **Transportation Assistance Program develops feeder system in rural Snohomish County**

### **What was the problem?**

Snohomish County is only partly served by a public transit system, Community Transit. Prior to 1997, rural communities outside the transit service area had been receiving limited access from the Snohomish County Senior Services with funds received from Community Transit, Snohomish County general funds, and federal grants. Community Transit implemented complimentary paratransit services required by the Americans with Disabilities Act and determined that their legal responsibilities were within a 3/4 mile corridor on fixed routes.

This situation created an opportunity for transportation providers, social service organizations, clients and public elected officials to look for alternative models which could effectively and efficiently meet the transportation needs of these special populations.

### **What strategy was proposed to address the problem?**

Senior Services of Snohomish County's Nutrition program initiated the Transportation Assistance Program (TAP) in 1997. This program uses outstation sites (senior centers) to employ qualified drivers, provide accessible and safe waiting space for customer transfers, vehicle maintenance, and insurance.

The coordination project funds will be used to:

- expand transportation options to the rural areas of Snohomish county by using all existing and newly created resources;
- increase the awareness of transportation options to persons with special transportation needs, and
- establish a coordination forum among service providers, resources and the community.

### **What successes/barriers have been encountered?**

The TAP program has been successful in developing partnerships with the East County Senior Center and the Stanwood Senior Center. These relationships will become a model for future expansion within that community such as Arlington, and may be incorporated in statewide best practices. In addition, the services that are being provided continue to rate high on passenger satisfaction. This has sometimes led to reluctance on individual's part to transition to other types of more appropriate transportation. In addition, existing regulatory service area boundaries have created inefficiencies that result in increased hardship for vulnerable clients.

### **What is the performance to date?**

The coordination project has completed the *Options* booklet and the initial distribution is underway.

Service performance (January – September 1998):

- Number of feeder trips provided: 3,120
- Number of point-to-point trips provided: 5,415
- Number of trips denied: 7
- Cost per boarding: \$22.38

## People for People coordinates in rural area with no transit

### What was the problem?

With the failure of the public transportation benefit authority funding initiative in 1993, the residents of rural Yakima county have limited transportation options. Many economically disadvantaged persons are forced to drive without a license or insurance to access basic services. The primary provider of specialized transportation in the county is a nonprofit organization that also is the Medicaid broker. The number of Medicaid trips provided by this provider increase an average of 10% per year. It is anticipated that 1,000 clients will be entering the Work First/Welfare to Work job training and work programs each year. Other providers of specialized transportation in the county include the school districts, nursing homes, taxi, and cabulances.

Social service agencies such as the Division of Vocational Rehabilitation, Department of Developmental Disabilities, Success by 6 Program, Catholic Family Community Services, Farm Workers Clinic and local hospitals, share the difficulty of no dependable coordinated transportation available to meet their clients' needs. Despite the transportation delivered by People for People, each program continues to operate more or less independently due to programmatic policies and pay instructions.

### What was the proposed strategy?

People for People will establish a coordinated transportation center, The Connection. Using current technology,

this center will link providers together in a two-stage process. The first stage will be to identify existing routes, schedules and vehicle capacities. The second stage will work with providers to unify the scheduling. The Connection will provide the residents of Yakima county with a single phone number where they can arrange trips using multiple providers with various funding sources, including self-pay.

### What barriers have been encountered? How have the barriers been addressed?

Social service programs in the community identified several barriers: reimbursement for cost of trips; liability; training; limited service areas and scheduling; standards for safety, vehicle maintenance and service; and client eligibility. Case managers had no uniform method to assess transportation problems. This resulted in individualistic uncoordinated approaches. The Connection will develop a training program for case managers to assess transportation issues objectively and teach the skills necessary to resolve these issues for clients.

### What are the project's successes?

- Providers met and resolved the barriers of standards for service and safety, client eligibility, liability, training, service areas, and scheduling. Consensus was derived from discussion and discovering that all providers shared common contract language.

- Over 40 vans from three providers are beginning to do centralized scheduling.
- Twenty social service agencies are willing to coordinate transportation.
- Exploring the use of two distinct transportation passes.
- Contract has been signed with local school district to share a van and provide transportation to special needs populations in a rural setting.
- Program has become full planning partner with Employment Security Department, DSHS, and Yakima Valley College in developing programs for Work First clients.
- Working with DSHS to develop training for case managers in coordinated transportation. Also working on policy statements for social service agencies to use in coordinating transportation.

**What is the performance to date?**

The Connection has installed state-of-the-art dispatching software. The Welfare to Work program has been the immediate beneficiary of this technology by the expanded capacity to determine ride share opportunities and geocode routes.

Measures	Performance
Cost/Mile	\$1.54–\$1.65
Cost/Hour	\$23.87–\$32.81
Cost/Boarding	\$11.50–\$16.94
Trips/Hour	2.62–2.84
Trips Denied	0.006%
Calls Received/Quarter	4150

Because the Connection is continuing to add new partners, which requires adjustments to operating strategies, several measures are reported as ranges.

## Mason Transit deals with limited rural resources

Rural communities present challenges for coordination that are different than urban environments. Resources are typically fewer, including transportation capacity. Many client services are not available, and require trips out of the community to provide needed access.

### What was the problem?

In Mason County, three key transportation issues were identified. First, there was a need to provide medical access to services outside of the county. Second, many trips within the county were being turned down by Mason Transit due to a lack of capacity within the system. Third, there were demands being made for new services for new clients for which new strategies were needed.

### What strategy was proposed to address the problem?

Two strategies were proposed aimed at improving coordination of transportation services. The first was to form a community forum of stakeholder agencies to collaboratively develop a community-based plan, and to improve communication between agencies. The second was a commitment by Mason Transit to hire an in-house mobility coordinator to give priority to the coordinated scheduling of trips.

The community forum has been helpful in identifying community resources and developing a resource directory which is nearing completion. This forum was also helpful in addressing community needs to meet the requirements of welfare reform and the Welfare to Work Program.



*“Coordination is giving us more rides from the same resources,” says Barry Mihailov, Transportation Director of Exceptional Foresters, one of Mason Transit’s subcontracted providers.*

### Performance to date

With the additional staff support, Mason Transit has been working with its service contractor to schedule trips with them and other providers in the community. In addition, Mason Transit has worked to develop volunteer program standards to assist with out-of-county trips. The following six tasks have been undertaken:

- Improved call screening to determine appropriate mode of travel. (Underway)
- Consolidating and grouping compatible trip requests. (Completed)
- Scheduling out-of-county trips on appropriate vehicles. (Underway)
- Arranging volunteer transportation. (Completed)
- Development and implementation of new operating agreements. (Underway)

- Developing and implementing a management information system. (Underway)

## How has the project succeeded?

An early success for the project was development of the volunteer program. The results show potential cost savings, but more importantly it provides service for trips that might not otherwise be made.

Developing the community forum has also been successful. It has increased awareness of specialized transportation in the community and has been helpful in formulating strategies to meet access needs for welfare to work clients.

One other important early success was the development of a working agreement with other providers in the county. This was initially difficult because the current Mason Transit contractor was concerned that additional operating agreements might mean less work and revenue. The contractor has become a willing participant in the process.

## Remaining barriers

Mason Transit has a number of problems that will continue to require attention. These problems include:

- A lack of information and data regarding potential demand levels. The cost of the volunteer program may double in a year due to increased demand. This raises some concern about potential budget impacts.

- There has been a lack of continuity with people at the community service office. This makes it difficult to plan and implement services. Turnover creates education problems for new staff, and staff shortages result in less attention given to transportation.
- There are vehicles operated in and out of the county by the Veteran's Office, HMOs, and other entities with whom coordination is difficult. These agencies are located outside the county, and their schedules are set with no consideration for coordination opportunities.

## Performance measures

The key benefit being provided by the Mason Transit Project is trips that might not otherwise be made. Through the volunteer program, 2,362 out-of-county trips were provided for medical purposes. A total of 2,498 trips have been provided by the volunteer program to date. In addition, a total of 222 trips were provided by community providers other than Mason Transit. This represents a total of 2,720 trips that would have been turndowns before the Project. Table 3 provides a brief summary, including the average cost per mile for each mode.

During the project to date, a total of 2,168 requests have been turned down for rides. Because Mason Transit is a demand response system, there has been no way to determine what percentage of those turndowns were special needs. The development of the call screening tool will greatly aid the system in identifying those customers in the future.

Table 6. Mason Transit's ACCT Demonstration Project

	Community Provider	Volunteer Program	Mason Transit
First quarter trips	98	691	NA
Second quarter trips	55	863	NA
Third quarter trips	69	944	NA
Total trips	222	2498	NA
Average cost/mile	\$ .92	\$ .315	\$ 3.40

*Summary of Mason Transit's project performance for the first three quarters of 1998.*

## Summary

Rural communities have significant access issues that differ from urban communities. Resources are limited, and many services are located outside of the community. Access to these remote services can be problematic absent sufficient capacity to serve the need. The few programs that are available must work closely together to maximize the usage of their resources, and to create innovative response to their access issues.

This project has pulled the community together, thereby raising the awareness of transportation and its relative importance. The commitment to a volunteer program is without precedent; this is clearly the largest volunteer program sponsored by a public transportation system in the state. The same cooperativeness has positioned the area to address new initiatives like Welfare to Work.

## Aging organization undertakes regional plan

### What was the problem?

Individuals within Clallam and Jefferson counties have intercounty and trunk-line (Forks to Seattle) transportation needs including medical, educational and social service programs. Initial assessments and anecdotal reports indicated most persons were unaware of any options to access destinations beyond the traditional transit routes. The lack of comprehensive information or a regional strategic plan addressing options for persons requiring special transportation create an unmet need and unused capacities in these two rural communities.

### What was the proposed strategy?

The Olympic Area Agency on Aging will develop a regional strategic plan specifically addressing transportation for people with special needs. Data will be gathered from a comprehensive survey of special needs individuals including persons with developmental disabilities, older persons and low-income in the two counties. In addition, an inventory will be conducted to identify capacities of both formal and informal transportation services provided by public agencies, private providers, social service programs, tribal governments, volunteer programs and advocacy agencies.

The information from the plan will then be discussed with the residents of Clallam and Jefferson counties through various public meetings, media outlets, educational programs and one-on-one assistance.



*Clallam County residents discuss transportation for people with special needs. After the Olympic Area Agency on Aging surveys special needs individuals within Clallam and Jefferson counties, a regional plan for specialized transportation will be developed.*

## **What successes/barriers have been encountered? How have the barriers been addressed?**

### **Gathering information**

Multiple strategies were used to contact persons within the two counties. Information was collected by telephone, in person and in writing. Peers were trained on the survey form from Section 8 Housing Units (low-income), Adult Family Homes, Senior Centers, Senior Health Clinics and Paratransit Services.

Contacted 103 individuals to survey by telephone.

Conducted 293 individual, face-to-face interviews.

Surveyed 25 providers of social services representing 1,500 others.

### **Fear of providing feedback**

Initially, there was some concern that persons who were interviewed would be concerned about sharing negative feelings for fear of losing the services they currently had available. The 20 volunteer surveyors sponsored by the Area Agency on Aging were able to build trust with the respondents. It is important to note that no evidence was found that local transportation providers had ever denied a trip to a person who had expressed concerns.

### **Service needs**

Individuals are challenged to know their health needs 24-hours ahead. Increasing the service capacity increases the potential for meeting same-day trip needs.

## **What is the performance to date?**

### **Survey**

Trained 20 interviewers.

Met with 20 area providers representing 750 individuals with special needs.



# Appendices

## Members of the Agency Council on Coordinated Transportation

### Voting members

Gretchen White, Chair, Department of Transportation

Gary Brueggeman, People for People, representing Community Transportation Association of the Northwest

Gladys Doriot, KWRL Transportation Cooperative, representing Washington Association of Pupil Transportation

Michael Harbour, Intercity Transit, representing Washington State Transit Association

Jennifer Joly, Governor's Transportation Policy Advisor

Thomas Kelly, Office of the Superintendent of Public Instruction

Toby Olson, Governor's Committee on Disability Issues and Employment

Charles Reed, Department of Social and Health Services

Bruce Reeves, Senior Citizens Lobby

### Legislative members

Representative Brad Benson

Senator Calvin Goings

Representative Phyllis Kenney

Representative Maryann Mitchell

Senator Eugene Prince

Representative Alex Wood

Senator Jeannette Wood

## Working groups — membership lists

Steve Abegg, Paratransit Services

Ginger Alonzo, Clover Park School District

Linda Rae Alvarado, DSHS WorkFirst

Patty Alvord, Twin Transit

Dave Andersen, Pierce Transit

Gene Baxstrom, LTC Staff

Jan Carden

Dave Daniels, Office of Financial Management

Barbara Davis, WSDOT

Megan Davis, WSDOT

Dan DiGuilio, Clallam Transit System

Roger Eastman, OSPI Pupil Transportation and Traffic Safety

Janey Elliott, King County Metro

Jim Erlandson, DSHS Aging and Adult Services

Rosemary Gallagher, DSHS Division of Vocational Rehabilitation

Coey Gilliland, Senior Services of Snohomish County

Rick Gordon, Whatcom Transportation Authority

Tom Gray, DSHS Medical Assistance

Ellen Gustafson, Kitsap Transit

Jason Hall, House Appropriations Committee Staff

Nancy Hanna, Department of Community Trade and Economic

Hank Hibbard, AASA

Edward Holen, Developmental Disabilities Council	Barbara Poetker, Area Agency on Aging
Hil Hornung, Consultant for Bellevue, Edmonds and Federal Way	Michael Rogers, DSHS-Division of Developmental Disabilities
Karl Johanson, COAST	Jennifer Scott, Governor's Office of Indian Affairs
Gordon Kirkemo, WSDOT Public Transportation and Rail	Jim Seeks, Intercity Transit
Myrna Lance, North Thurston School District	Cathy Silins, WSDOT-Public Transportation & Rail
Al Landis, People for People	Rosemary Siipola, Cowlitz-Wahkiakum Council of Governments
Gary Lebow, Legislative Transportation Committee	Dan Snow, Washington State Transportation Association
Terry Liddell, Governor's Head Start State Collaboration Project	Fred Stoffer, CTA-NW
Mary Looker, Department of Health	Sandy Stutey, King County Metro Accessible Services
Mary Massey, Department of Employment Security	Kathy Thomas, Tri-Valley Private Industry Council
Patty McDonald, DSHS	Ron Thornton, Amalgamated Transit Union, Local 758
Paul Meury, DSHS Medical Assistance Transportation Program	Tracy Vandewall, Pierce County Parent Coalition for Developmental Disabilities
John Mikel, Pierce County Human Services Aging and Longterm Care	Doug Vaughn, Office of Financial Management
Susan Millbank, Spokane Transit Authority	Jeanne Ward, DSHS
Joanne Monroe, Department of Employment Security	Janis Webb, Multi Service Centers of North and East King County
Lynn Moody, Multi Service Centers	Gretchen Weber, Community Transit
Jim Moore, Sound Transit Regional Express	Patrick White, DSHS Medical Assistance
Pat Morin, WSDOT	Park Woodworth, King County Department of Transportation
Patsy Nedrow, WSDOT	Thomas Young, Pierce Transit SHUTTLE
Linda Nguyen, Tacoma/Pierce County Private Industry Council	
Victor Obeso, King County Metro Transit	
Mary Palmer, Paratransit Services	
Martha Petertil, Family Policy Council	

## Revised Code of Washington creating ACCT

RCW 47.06B.010 Finding—Intent. (Effective until June 30, 2004.) The legislature finds that transportation systems for persons with special needs are not operated as efficiently as possible. Lack of coordination produces irrational situations, such as several different vehicles arriving simultaneously at the same location to pick up several different persons with special needs. When separate vehicles arrive within minutes of each other to transport individuals with special needs to similar destinations, resources are wasted and fewer people are being served. In some cases, programs established by the legislature to assist persons with special needs can not be accessed due to these inefficiencies.

It is the intent of the legislature that public transportation agencies, private nonprofit transportation providers, and other public agencies sponsoring programs that require transportation services coordinate those transportation services. Through coordination of transportation services, programs will achieve increased efficiencies and will expand services to a greater number of persons with special needs. [1998 c 173 § 1.]

RCW 47.06B.020 Agency council on coordinated transportation— Creation, membership, staff. (Effective until June 30, 2004.)

- (1) The agency council on coordinated transportation is created. The council is composed of nine voting members and eight nonvoting, legislative members.
- (2) The nine voting members are the superintendent of public instruction

or a designee, the secretary of transportation or a designee, the secretary of the department of social and health services or a designee, and six members appointed by the governor as follows:

- (a) One representative from the office of the governor;
  - (b) Two persons who are consumers of specialized transportation services;
  - (c) One representative from the Washington association of pupil transportation;
  - (d) One representative from the Washington state transit association; and
  - (e) One of the following:
    - (i) A representative from the community transportation association of the Northwest; or
    - (ii) A representative from the community action council association.
- (3) The eight nonvoting members are legislators as follows:
- (a) Four members from the house of representatives, two from each of the two largest caucuses, appointed by the speaker of the house of representatives, two who are members of the house transportation policy and budget committee and two who are members of the house appropriations committee; and
  - (b) Four members from the senate, two from each of the two largest caucuses, appointed by the president of the senate, two members of the transportation committee

- and two members of the ways and means committee.
- (4) Gubernatorial appointees of the council will serve two-year terms. Members may not receive compensation for their service on the council, but will be reimbursed for actual and necessary expenses incurred in performing their duties as members as set forth in RCW 43.03.220.
  - (5) The secretary of transportation or a designee shall serve as the chair.
  - (6) The department of transportation shall provide necessary staff support for the council.
  - (7) The council may receive gifts, grants, or endowments from public or private sources that are made from time to time, in trust or otherwise, for the use and benefit of the purposes of the council and spend gifts, grants, or endowments or income from the public or private sources according to their terms, unless the receipt of the gifts, grants, or endowments violates RCW 42.17.710. [1998 c 173 § 2.]
  - (5) Recommend to the legislature changes in law to assist coordination of transportation services;
  - (6) Act as an information clearinghouse and advocate for coordinated transportation;
  - (7) Petition the office of financial management to make whatever changes are deemed necessary to identify transportation costs in all executive agency budgets;
  - (8) Report to the legislature by December 1, 1998, on council activities including, but not limited to, what demonstration projects have been undertaken, how coordination affected service levels, and whether these efforts produced savings that allowed expansion of services. Reports must be made once every two years thereafter, and other times as the council deems necessary. [1998 c 173 § 3.]

RCW 47.06B.030 Council—Duties. (Effective until June 30, 2004.) The council shall:

- (1) Develop standards and strategies for coordinating specialized transportation;
- (2) Identify and develop, fund as resources are made available, and monitor coordinated transportation pilot projects;
- (3) Disseminate and encourage the widespread implementation of successful demonstration projects;
- (4) Identify and address barriers to transportation coordination;

RCW 47.06B.900 Council—Termination. The agency council on coordinated transportation is terminated on June 30, 2003, as provided in RCW 47.06B.901. [1998 c 173 § 6.]

RCW 47.06B.901 Repealer. The following acts or parts of acts, as now existing or hereafter amended, are each repealed, effective June 30, 2004:

- (1) RCW 47.06B.010 and 1998 c 173 § 1;
- (2) RCW 47.06B.020 and 1998 c 173 § 2; and
- (3) RCW 47.06B.030 and 1998 c 173 § 3. [1998 c 173 § 7.]