COORDINATED TRANSPORTATION PLAN FOR ELDERLY AND PEOPLE WITH DISABILITIES

October 2012

NELSON
NYGAARD

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1 INTRODUCTION

Decisions we make today on how best to invest in transportation options for elders and people with disabilities will affect the future quality of life for thousands of tri-county residents. By 2030, it is projected that the region will experience a 123% growth in the senior population[1]. Existing resources are inadequate to meet this growing demand. According to the 2010 US Census, over 10% of the region's population reported that they had a disability. As the elderly become a higher percentage of the population, a higher percentage will also become disabled due to physical frailty caused by the effects of aging.

These changing demographics challenge the conventional solutions of more buses, light rail service, and paratransit vans. While such traditional modes of transportation will surely be needed, there is a limit to how much the region can afford. Improved coordination among existing services, innovative ways of delivering services, and a regional commitment to placing public facilities and social services at locations served by public transit will also be needed.

The 2012 update to the *Tri-County Elderly and Disabled Transportation Plan* (EDTP), and now referred to as the Coordinated Transportation Plan for Elderly and People with Disabilities (CTP) builds upon the foundation of the 2006 EDTP as well as the 2009 update, which described the region's vision of a continuum of transportation services that takes into account people's abilities as they transition through various stages of age and disability.
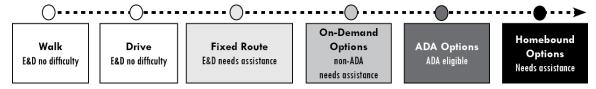
Figure 1 illustrates a Continuum of Transportation Options beginning with transportation for elders and people with disabilities (E&D) who have no difficulty with mobility, through the life stages where they need some accommodation, to services for people who stay at home because of limited mobility or fragile health, either temporarily or long-term.

Since the development of the 2006 EDTP, the region has made significant advances and implemented new programs, such as creating new low cost-no cost transportation options, starting new community based shuttle services, and launching a new paratransit certification process.   The region will continue to focus on developing an innovative continuum of services, one that takes in to account individuals' abilities throughout life. Additional paratransit services will be needed to take E&D customers to fixed route, particularly in areas without sidewalks and safe pedestrian crossings. As a result, new sources of funding will need to be identified and the Special Transportation Fund Advisory Committee (STFAC), which provided guidance and oversight of this plan update, has recognized such efforts as a high priority. Other strategies of particular interest for this update focus on taking steps to encourage use of regularly scheduled transit, and to continue a regional commitment to placing new public facilities and social services near transit services.

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[1] Chapter 5 presents a summary of regional demographic information as part the Plan's needs assessment.

Figure 1-1   Continuum of Transportation Options for Elderly and Disabled Population

Walk	Drive	Fixed Route	On-Demand Options	ADA Options	Homebound Options
E&D no difficulty	E&D no difficulty	E&D needs assistance	non-ADA needs assistance	ADA eligible	Needs assistance

VISION AND GUIDING TENETS OF THE CTP

Vision: Guide transportation investments toward a full range of options for elders and people with disabilities, foster independent and productive lives, strengthen community connections, and strive for continual improvement of services through coordination, innovation, and community involvement.

Guiding Tenets:

1. Coordinate. To make best use of service hours and vehicles, assure that services are coordinated and well organized. Assure that customer information is useful and widely provided throughout the region. Work with others to achieve results.

2. Innovate. Increase options available to E&D customers by providing innovative, flexible, attractive and cost-effective alternatives to standard fixed route buses, rail and paratransit. Expand outreach and education on how to use services.

3. Involve the Community. Include elders and people with disabilities, social services staff, private non-profit providers, and other community partners in the dialogue and decisions about services. Advisory committees working on E&D issues should have over 50% representation of elders and people with disabilities.

4. *Improve the Service Foundation.* Fixed route service frequencies and coverage in some suburban areas, as well as ways to get to the fixed routes, will need to be improved. Continually improve the total fixed route transit system including the waiting area, customer service of the operators, priority seating, security and accessibility.

5. *Integrate Land Use and Transportation Decisions.* Communicate importance of land use and transportation for E&D transportation. Seek opportunities to influence land use decisions and eliminate environmental barriers to using transit.

6. Improve Customer Convenience. Minimize physical and psychological impediments to using core transit services relative to other modes. Make transit system easy to understand and use. Facilitate transfers between transit services with the use of wayfinding information and high-amenity transfer facilities.

7. *Improve Safety.* Assure that real and perceived safety concerns are addressed at passenger waiting areas and on board transit vehicles. Utilize transit provider staff, volunteers and other riders to increase sense of security along with investments in physical infrastructure where appropriate.

The CTP includes a series of appendices which provide additional detail to supplement the report text. Two appendices are intended to guide the reader with respect to common acronyms, and to provide a Glossary of Terms. These are included as Appendix A and B, respectively.

DEVELOPMENT OF THE CTP

The CTP was developed with the assistance of the STFAC. This 25-member group is appointed by the TriMet Board of Directors to advise TriMet in making recommendations about formula and discretionary grant distributions funded by the State of Oregon's Special Transportation Fund.

The STFAC also helps develop a coordinated transportation plan to provide services for elders and people with disabilities. More than one-half of the committee is comprised of elders and/or people with disabilities representing geographic diversity in the tri-county area, including members of the TriMet Committee on Accessible Transportation (CAT). The remaining members are staff representing the County Aging and Disability agencies; TriMet, which is the regional transit agency; small transit systems; and Ride Connection, which is a network of over 30 partners delivering transportation for E&D riders. Appendix C lists the STFAC members.

The STFAC met several times to review the progress made since 2009, to revise elements of the previous plan to reflect current circumstances, and to create new programs. The rest of this document reflects the results of this work. Appendix D documents the public process employed for the CTP update.

In addition to updating the STFAC on a regular basis, the following steps were taken to develop the key findings included in this Plan Update:

- One-on-one meetings were conducted with service providers and human service agency staff to learn more about the perceived needs and gaps as well as to reach consensus on new strategies to include;
- Providers were contacted to ensure their program descriptions are accurate and up-to-date;
- A regional workshop was convened to focus on opportunities to enhance use of fixed route transit;
- A peer review was conducted of five transit agencies who have already implemented strategies to improve use of fixed route for elders and persons with disabilities.

The CTP fulfills the planning requirements of the State's Special Transportation Fund (STF) administrative rules and the federal requirement for a coordinated human services plan. The federal Safe, Accountable, Flexible, Efficient Transportation Equity Act: A Legacy for Users (SAFETEA-LU) requires that transportation providers and human service agencies plan jointly in order to be eligible for Elderly and Individuals with Disabilities Program, New Freedom Program and Job Access Reverse Commute Program federal funds. Federal guidance specifies four required elements of a coordinated plan, as follows:

- An assessment of available services that identifies current transportation providers (public, private, and non-profit). Chapter 2 highlights the services currently available in the tri-county region.
- An assessment of transportation needs for individuals with disabilities, older adults, and people with low incomes. This assessment can be based on the experiences and perceptions of the planning partners or on more sophisticated data collection efforts, and gaps in service. Chapter 4 summarizes both urban and rural needs for the targeted populations.

- Strategies, activities, and/or projects to address the identified gaps between current services and needs, as well as opportunities to achieve efficiencies in service delivery. Chapter 6 presents the set of strategies identified in this update.
- Priorities for implementation based on resources (from multiple program sources), time, and feasibility for implementing specific strategies and/or activities. The highest priority strategies are indicated in Chapter 6 as well.

2 EXISTING TRANSPORTATION SERVICES

A CONTINUUM OF SERVICES

TriMet operates fixed-route and ADA paratransit services within each of the three counties. SMART (South Metro Area Rapid Transit) in Wilsonville; CAT (Canby Area Transit) in Canby; Mountain Express and SAM (Sandy Area Metro) in Sandy are the other fixed-route transit agencies in the tri-county area. In addition, SCTD (South Clackamas Transit District) operates deviated fixed-route service in Molalla. The Ride Connection partner network of over 30 private nonprofit and volunteer service providers complements the services provided by the region's transit agencies. The Ride Connection network provides 24% of the region's door-to-door rides for elders and people with disabilities. TriMet considers Ride Connection's services so important that it provides approximately $1 million a year to Ride Connection to support the provider network and provide volunteer transportation and local shuttle services for elders and people with disabilities.

This chapter takes note of new services that were recommended in the 2006 EDTP. The region was able to add new services with $375,000 annually of additional funding provided by the Federal Transit Administration New Freedom program and by focusing on adding low cost-no cost community-based transportation solutions

All new services were developed with extensive community involvement. The concluding chapter of this report also documents progress toward the individual strategies laid out in the 2006 document.

Figure 2-1, Continuum of Transportation Services, lists the existing transportation providers in each of the three counties. The RideWise program teaches elders and people with disabilities how to use the public transportation by providing information on travel choices, individualized trip planning, and fixed route travel training.

Figure 2-1   Continuum of Transportation Services

County	Service Areas		Existing Transportation Services							
			Regularly Scheduled Fixed Route	Deviated-Fixed Route	Shuttle Service	Paratransit Service				Community Based Transportation (includes RideWise)
						ADA Paratransit	Medicaid	Employment	Nutrition & Groceries	
Washington	Urban Areas	King City	TriMet Bus/MAX		King City RideAbout	LIFT	DMAP Broker		RC Network	RC Network
		Tigard	TriMet Bus/MAX			LIFT	DMAP Broker	RC Job Access	RC Network	RC Network
		Beaverton	TriMet Bus/MAX		Beaverton RideAbout	LIFT	DMAP Broker		RC Network	RC Network
		Rest of UGB	TriMet Bus/MAX			LIFT	DMAP Broker			RC Network
	Small Community	Banks North Plains Forest Grove Cornelius			DMAP Broker			RC Network RC Job Access		
	Rural Areas				RC U-Ride		DMAP Broker	RC U-Ride		RC Network
Multnomah	Urban Areas	N/NE Portland	TriMet Bus/MAX		N/NE RideAbout	LIFT	DMAP Broker		RC Network	RC Network
		East Portland	TriMet Bus/MAX		Gateway Shuttle Cherry Blossom Shuttle[3]	LIFT	DMAP Broker		RC Network	RC Network
		Mid-County	TriMet Bus/Max		Mid-County RideAbout	LIFT	DMAP Broker		RC Network	RC Network
		Rest of UGB	TriMet Bus/MAX Portland Streetcar		Downtown RideAbout	LIFT	DMAP Broker		RC Network	RC Network

County	Service Areas		Existing Transportation Services							
			Regularly Scheduled Fixed Route	Deviated-Fixed Route	Shuttle Service	Paratransit Service				Community Based Transportation (includes RideWise)
						ADA Paratransit	Medicaid	Employment	Nutrition & Groceries	
	Rural Areas						DMAP Broker			RC Network
Clackamas	Urban Areas	Wilsonville	SMART			SMART	DMAP Broker		SMART	SMART RC Network
		Rest of UGB	TriMet Bus/MAX			LIFT	DMAP Broker		RC Network	RC Network
		Happy Valley/ Damascus					DMAP Broker		RC Network	RC Network
	Large Community	Canby	CAT			CAT	DMAP Broker		RC Network	RC Network
		Molalla		SCTD			DMAP Broker		RC Network	RC Network
		Sandy	SAM			STAR[1,2]	DMAP Broker		RC Network	RC Network
		Hoodland		Mountain Express by Clackamas Co			DMAP Broker		RC Network	RC Network
	Small Community	Estacada	TriMet Bus/MAX SAM			LIFT	DMAP Broker		RC Network	RC Network
	Rural Areas						DMAP Broker		RC Network	RC Network

Key: **ADA:** Americans with Disabilities Act   **UGB:** Urban Growth Boundary   **MAX:** light rail   **OMAP:** Oregon Medical Assistance Program (Medicaid)
RC: Ride Connection

SERVICES PROVIDED BY TRANSIT AGENCIES

TriMet

TriMet's Advisory Committee

TriMet's Committee on Accessible Transportation (CAT) advises TriMet staff and the Board on TriMet's plans, policies and programs for accessible transportation. Older adults and people with disabilities comprise at least 51% of the CAT membership. The remaining members are consumers of TriMet transportation services or representatives of consumers. The CAT has a monthly business meeting, an executive committee, and ad-hoc committees to address special issues as needed.

TriMet Fixed Route

TriMet operates a fixed-route network consisting of 79 bus lines, a 52-mile, 85-station MAX light rail system and a 14.7 mile commuter rail service. By 2016, all fixed-route buses will have low floors, allowing people to conveniently board the bus without climbing stairs or using a lift. In the TriMet district, 92% of people 65 years and older live within one-half mile and 75% live within one-quarter mile of fixed-route bus or MAX service. Elders and people with disabilities board TriMet bus and MAX 10.7 million times a year out of a total of 99.3 million boardings (FY10).

Trips by people with disabilities under age 65 have increased 6.6% per year on average since 1999. Trips by all elders and people with disabilities increased 3.3% annually during the same period, an average of 296,000 more boardings every year (based on Fall '09 survey).

TriMet's cost to provide each fixed route originating ride is $1.47, net of the fare revenue.

TriMet is committed to continually improving the total transit system with enhanced customer information, access to transit, amenities at bus and rail stops, frequency, reliability, passenger comfort, enforced priority seating, safety and security. Building the total transit system is the top goal of TriMet's Transit Investment Plan.

New Service

In summer 2011, construction began on the Portland-Milwaukie light rail transit line. When complete, the line will provide 7.3 miles of light rail service between Portland State University in downtown Portland and Oak Grove in north Clackamas County, and will include a total of 10 new stations. Two new stations will be west of the Willamette River and eight will be located on the east side of the river. East side stations will be located in inner Southeast Portland, Milwaukie and north Clackamas County. The line will cross the river via a new bridge; the Portland Milwaukie Light Rail Bridge, which is currently in early phases of construction. The bridge will span the river from OHSU's future South Waterfront campus on the west side to OMSI on the east side. Along with light rail trains, the bridge will also serve pedestrians, bicyclists, emergency vehicles, buses and in the future, Portland Streetcar.

Construction of the line is scheduled for completion in late spring, 2015 and the line is scheduled to begin operation in September, 2015. The construction project is estimated to create as many as 14,000 jobs and is expected to generate up to 25,500 average weekday rides by 2030.

TriMet Complementary Paratransit

LIFT service is door-to-door ADA (Americans with Disabilities Act) paratransit provided to people who, because of their disability, cannot use or access fixed route transit. As of September 2, 2012, the LIFT paratransit service area and hours of operation have been adjusted to match nearby bus/MAX service. There are now six LIFT paratransit service boundaries: weekdays, weekday evenings, Saturdays, Saturday evenings, Sundays, and Sunday evenings. As allowed under the ADA, LIFT trips are only provided if there is nearby fixed-route bus or rail service in operation during that time. Rides must be reserved by 5PM the day before and can be reserved up to seven days in advance. There are 1.1million annual boardings on TriMet LIFT service. The cost to TriMet is about $28.31 per one-way trip, net of fares. Since FY08, LIFT paratransit ridership and cost growth is trending lower. Between 2000 and 2008, costs increased 11% annually. Between 2008 and 2012, costs increased less than 1% annually.

TriMet MTP

TriMet's Medical Transportation Program provides non-emergency transportation to eligible Oregon Health Plan Plus Medicaid clients traveling to and from eligible medical services. Transportation is available for clients who have no other way to get to their medical appointments. In addition, some trips are allowed for non-medical purposes if it can be demonstrated that providing such trips can help persons remain independent and not rely on more costly institutionalized care.

TriMet administers this program under contract to the State of Oregon. In most parts of Oregon, Medicaid transportation services are brokered by local transit agencies. TriMet serves as the broker for the tri-county (Multnomah, Washington, Clackamas) region, which means that TriMet staff is responsible for:

- Confirming customer eligibility through the State's client database
- Confirming the trip requested meets State Medicaid guidelines
- Determining the most appropriate mode of travel for the customer
- Arranging for the trip through a vendor under contract to TriMet
- Reimbursing the vendor for the service provided
- Maintaining records and provides overall administration for the program according to State of Oregon DHS guidelines

TriMet Operator Training

TriMet operators and supervisors receive ADA information and updates through Training Bulletins and as part of the yearly Bus Operator Recertification Training program. New operators receive nearly 20 hours of ADA and disability awareness as part of their initial training. Much of this training focuses on procedural issues, but also includes experiential exercises.

Disability awareness and ADA training is given to new operators during their 6-month probation. Over 2,000 operators, supervisors, managers and others have attended since 1998. It includes procedural and experiential exercises. Riding Together also uses a panel of people with disabilities. Panel members provide information about the nature of their disability and the challenges they face in riding public transit. One of TriMet's challenges in providing this training has been to secure panel members who are consistently willing to attend the training.

TriMet Funding

Payroll, self-employment and state-in-lieu tax revenues account for about 55% of TriMet's operating revenues. Passenger revenues account for about 25% of revenues, federal and state operating grants account for 15% of revenues and all other sources (interest, advertising) account for 5% or operating revenues.

Other Public Transit Providers

SAM (Sandy Area Metro)

Sandy's Advisory Committee

A Transit Advisory Committee, consisting of 12 individuals from the greater Sandy area and three associate members representing the neighboring communities of the Villages of Mt. Hood and Estacada, advises the City of Sandy. Membership consists of broad representation, including the business community, students and youth, with elders and people with disabilities making up more than 75% of the committee. Quarterly meetings are advertised and open to the public. The Committee forwards transit service recommendations to the Sandy City Council, where final decisions are made in a public forum.

Sandy Service

The City of Sandy provides one fixed route within Sandy along the commercial corridor with commuter routes to Estacada and Gresham on its SAM system. Also available is STAR, a general public dial-a-ride service. STAR is primarily used for trips within Sandy but will extend up to 3-miles outside of the city limits subject to availability. Because Sandy is a small city, STAR is used to provide local door-to-door dial-a-ride service for the general public as well as for older adults.

ADA service is provided Monday-Friday from 5:30 a.m. to 9:00 p.m. and from 10:15 a.m. to 4:30 p.m. on Saturdays. ADA service can be accessed later on Saturdays via dispatch staff. STAR acts as a paratransit feeder service to the three fixed routes operating between Sandy and Gresham, Estacada and the Villages of Mt. Hood. Elders and people with disabilities comprise 59% of the STAR ridership which increased by 18.5% following a service adjustment in 2009 that returned the service to dial-a-ride all hours of the day. A one-seat ride to and from the Portland area is provided to non-Medicaid-eligible frail elders and people with disabilities for medical appointments. STF Formula grants partially fund the STAR service and the STF Discretionary program provides partial funding for the out-of-area medical service.

In October 2006, nine daily service hours were added on weekdays to the commuter route between Sandy and Gresham creating half-hour headways. The 17% service increase resulted in a ridership increase of 37% over the previous year. Similarly, the commuter route between Sandy and Estacada, funded by Job Access, was interlined with the Mountain Express service in order to gain efficiencies by using the same vehicle and driver to serve both communities throughout the day. The frequency was increased by one run per day on weekdays, and the ridership increased 23% in 2007; 11% in 2008; and 30% between 2008 and 2011.

Sandy Funding

With federal and state funding sources diminishing, local payroll and self-employment tax provides a greater portion of the funding at 41% of Sandy Transit's operating revenues. Federal

grant programs (5311, 5310, JARC) account for 36%, state grants (STF) represent 13%, Business Energy Tax Credits provide 9% and other sources (fares, interest, etc.) make up the last 1% of operating revenues.

SMART (South Metro Area Regional Transit)

SMART Advisory Committee

SMART is advised on services through public input, City Council, and actively solicits input from elders and people with disabilities through the Wilsonville Community Center. SMART also works directly with Clackamas Community Health (formerly Clackamas Mental Health) to coordinate transportation services.

SMART Service

SMART, operated by the City of Wilsonville, has seven fixed routes as well as door-to-door dial-a-ride service, with priority given to ADA-eligible customers. Pre-scheduled service is provided to the Wilsonville Community Center. Transportation to Portland area medical appointments for elders and people with disabilities is provided with STF funds

SMART Funding

Business and self-employment tax provides 62% of SMART's operating revenues. Federal grants provide 12% and STF and other operating grants represent 22% of SMART's budget. Fares make up 3% of SMART's current budget and miscellaneous revenue is 1%.

CAT (Canby Area Transit)

CAT Advisory Committee

A seven member Transit Advisory Committee (TAC) advises Canby Area Transit Staff and the Canby City Council. The TAC meets monthly and is made up of elders, people with disabilities, Canby residents, CAT customers, and members of the business community.

CAT Service

Canby Area Transit (CAT) operates commuter service along 99E to both Oregon City and Woodburn. The service known as the Orange Line also provides local fixed-route services along the 99E corridor between Canby Market Center (Fred Meyer) and Canby Square (Safeway). The Orange Line operates Monday-Friday beginning with trips to Oregon City at 5:15 am and continuing until the last bus leaves the Oregon City Transit Center at 8:00 pm.

The CAT Dial-A-Ride program provides three types of service. These services require either advance registration or eligibility approval. The following provides a brief overview of each service.

1. Complementary Paratransit service (for eligible elders and people with disabilities) is provided within ¾ mile of the local Canby Fixed-Route.

2. CAT's Premium Dial-A-Ride service is available to customers who are eligible for complementary paratransit services. This service transports individuals to and from destinations within the Oregon City city limits. It is limited by trip purpose to medical, education, employment, and social service appointments.

3. The newest of CAT services is a General Public Dial-A-Ride service, implemented on June 27, 2011, when CAT's local Fixed-Route services were dramatically reduced. This service provides morning and afternoon shopping shuttles and local demand responsive rides as space allows. This service is open to anyone traveling in Canby and is provided on a space available basis (first-come first-served).

CAT Funding

In FY10-11 Canby Area Transit received operating revenue from local resources including payroll tax, the state's Special Transportation Fund (STF), federal 5311 Non-urbanized area formula program, the federal 5316 Job Access Reverse Commute (JARC) program, and capitalized preventive maintenance funding from the federal 5310 program. On average over the past 5 years, 56 percent of CAT's revenue is from local resources including payroll tax, and nearly 8 percent is from the STO/STF formula programs and the remaining 36 percent came from either BETC revenues or federal grant funding. In FY10-11 just over 8 percent of CAT revenue came from the STF formula program.

SCTD (South Clackamas Transit District)

SCTD Advisory Committee

The SCTD Board of Directors consists of seven members elected from the District. The District is a free-standing Transportation District organized under Chapter 267 of the Oregon Revised Statutes (ORS). Elders and people with disabilities are serving on the board. SCTD also has an advisory committee that is called on as needed.

SCTD Service

The SCTD operates three fixed routes. The city route and the Canby route operate ten hours a day Monday through Friday, and the Community College route operates 15 hours a day, five days a week as well as 10 hours on Saturday. The Canby route will make flag stops. All routes offer deviated-fixed route service for older adults and people with disabilities. Advance reservations are required.

SCTD Funding

SCTD is funded with a payroll and self-employment tax, passenger revenue, federal 5311 Non-urbanized area federal assistance, state Special Transportation funds, interest and other sources.

Mountain Express

Mountain Express is a general public fixed-route service operating weekdays between Sandy and the "Villages of Mt. Hood" (Brightwood, Welches, Wemme, Zig Zag and Rhododendron). It offers flag stops and ADA eligible deviations. All vehicles are lift equipped and operators announce stops. Door-to-door service is available for eligible elders and people with disabilities for eligible trips.

Ride Connection

Advisory Committee

Ride Connection's fifteen-member board of directors oversees and directs the organization's activities. Board members represent a cross section of the region and those that are served by Ride Connection and have the skill set needed to ensure proper oversight is maintained. Advisory committees (e.g., Audit and Finance Committee, Program and Provider Services Committee, RideWise Committee) report to the board and monitor business practices, service delivery methods, fund development activities and core accountabilities to ensure the stability and longevity of the organization and its network.

Background

Ride Connection is a private non-profit organization, located in Portland, Oregon, that coordinates transportation operations of 30+ small community-based providers of elderly and disabled transportation.

The partner network includes a variety of human service organizations serving elders and people with disabilities throughout the metropolitan area. Each transportation service is individually designed for the neighborhood in which it is located. Ride Connection service partners include the local chapter of the multi-service centers, faith-based groups, senior centers and residential care facilities. The vast majority of people served by the Ride Connection network are eligible for ADA transportation. (A complete listing of network service partners is included in Appendix E.)

In areas of the district where there are no private non-profit partners of elderly and disabled transportation, such as in East Multnomah County and part of Washington County, Ride Connection becomes the provider, hiring operators and operating the service. In other areas, where there are no private non-profit providers and more capacity is needed, contracts are established with taxicab companies.

In the last eight years, Ride Connection has more than doubled the transportation services they provide for elders and people with disabilities. This network operates a fleet of 113 accessible vans and small buses, in addition to volunteer-owned vehicles. Approximately 650 drivers, of whom approximately two-thirds are volunteers, provided over 410,000 E&D rides in FY112. Ride Connection volunteers provided approximately 42,485 driver hours in FY12.

Ride Connection provides the following support services for its partners:

- Service coordination between partners
- Service scheduling and centralized call center services for a growing number of partners
- Individual travel ability assessment
- Driver, partner and staff training and development
- Accessible fleet acquisition
- Management and maintenance of a 100+ fleet
- Technical assistance and support to service partners and community organizations
- Outreach and joint marketing of regional transportation services
- Advocacy for individuals with transportation needs and for community-based service partners who meet those needs

- Volunteer recruitment assistance
- Data management and reporting support
- Web –based tools for daily operations and reporting
- Contract administration, compliance and performance monitoring
- Customer service monitoring
- Grant writing, fundraising, and serving as conduit for state and federal fund
- Service planning, which includes coordination of existing services for efficiency and creation and implementation of innovative ideas to meet local and regional transportation needs in the community

Partnership Support

Ride Connection recognizes and supports the uniqueness of individual service partners and community organizations in the region. As the coordinating organization in the region, Ride Connection works diligently to provide collaborative opportunities for planning and funding, and supports; driver training, quality customer service practices, community relationship building, contract management, reporting tasks, fiscal monitoring, planning, and volunteer management support, so that service partners in the network can focus on what they do best, providing transportation options for older adults and people with disabilities.

The Ride Connection coordination model is a hybrid of centralized and decentralized activities. Many of the direct service activities happen at the local neighborhood level, where knowledge of the community and its needs support a customer-focused, needs-based philosophy. Where centralization and economies of scale can be achieved, functions are consolidated. Ride Connection is committed to enhancing support and strengthening network service partners while creating transportation solutions in accordance with the Elderly and Disabled Transportation Plan.

Transportation Services

Ride Connection has been instrumental in the development of regional one stop travel information, driver training and travel training services, and a broad range of transportation services to address a variety of identified customer needs. It provides key connections to social service organizations and County aging and disability services, a role that urban transit agencies have not traditionally emphasized within their organizations. The following provides an overview of services.

Individualized Mobility Planning – Travel Coaching

Ride Connection serves as the first point of contact for new customers in need of transportation services and agency professionals working to assist their clients. The goal is to counsel and educate older adults and people with disabilities about all available transportation options in their community providing, at the direction of the consumer, information and assistance to the most appropriate, least restrictive mode of transportation.

Information and Referral and Ongoing support

Ride Connection provides information on all available travel options for elders and people with disabilities in the region, and refers customers to programs and options appropriate to their individual circumstances.

The centralized service center provides ease of access to customers through a single portal - one accessible regional phone number. The Service Center has translation services available through a third party in most languages and currently has Spanish and Russian speaking staff on site. A Text Telephone (TTY) number is also available and provides the following services to network programs and their customers:

- Call taking
- Customer screening and registration
- Information and referral
- Trip booking and scheduling support
- Support with planning a trip on fixed route and/or referral to travel training

All Ride Connection community- based rides in Washington County and Multnomah County are scheduled using the same software.

The center schedules and dispatches rides for a growing number of the service partners.

Service partners who are currently not receiving scheduling and dispatch assistance from the Ride Connection Customer Service Center participate in the information and referral program, which allows customers to receive the individualized mobility planning and be referred to the service partner in their area.

RideWise

RideWise is a travel training program that assists older adults and people with disabilities in riding safely and independently using public transportation. By providing information on travel choices and teaching how to navigate the region's public bus and rail systems, RideWise customers build confidence and skills to use any of the transit options available to them. The level of service provided is based on each individual's ability level.

The one-time cost of travel training gives people independence, mobility and choice and can save a lifetime of trips on LIFT, freeing up funds for individuals whose disability requires door-to-door service.

Community Shuttles (RideAbout)

Many people make regular short trips within their community to access essential services, shopping and life-enriching activities. In an effort to ensure that customers are able to access the basic services that they need to use on a regular basis, Ride Connection operates RideAbout Community shuttles to ensure access to cost-effective transportation to and from common destinations. RideAbout shuttles are designed to meet the specific needs of the neighborhoods that they serve. Community shuttle options:

- King City RideAbout: provides service in and around King City three days per week
- Hollywood to Gateway RideAbout: provides weekly service from Northeast Portland to the Gateway Regional Center
- Downtown RideAbout: provides service in Downtown Portland and Northwest Portland two days per week
- North/Northeast RideAbout: provides five day per week service to multiple destinations in and around North and Northeast Portland

- Beaverton RideAbout: provides five day per week service to the Elsie Stuhr Center and other destinations in Central Beaverton
- Mid-County Ride About: operates five days per week and provides service to IRCO, the East Portland Community Center and shopping shuttle service for Lents/Powellhurst-Gilbert and Hazelwood
- Southwest RideAbout : provides shopping shuttle service and trips to the Multnomah Arts Center three days per week
- Community Shuttle: Western Washington County – provides access for rural residents to connect to the urban transportation corridor. Route includes Banks, North Plains to Hillsboro Transit Center and back, twice daily, Monday through Friday.

Community Door-to-Door and Door-Through-Door Services

Ride Connection and their network of partner agencies provide door-to-door and door-through-door transportation for elders and people with disabilities. Community transportation is available throughout the entire Tri-County area. Rides must be scheduled in advance. Hours and days of service vary within each community, but generally are available 8:00 a.m. to 5:00 p.m. Monday through Friday.

Community door-to-door and door-through-door service may be provided on small buses, vans, taxis, or in sedans. All vehicles are accessible for mobility devices. Ambulatory customers may receive rides in privately owned vehicle driven by volunteers. The service is door-to-door or door-through-door. Services are free of charge to the customer, though donations are gladly accepted. In addition, many Ride Connection service partners provide regularly scheduled group trips which often change to meet local community needs. These group trips and informal shuttles provided by Ride Connection partners play an important role as they efficiently transport larger numbers of passengers to popular destinations and reduce the demand for more expensive individual passenger trips.

Vehicle Only Program

Ride Connection uses grant and preventive maintenance funds to purchase vehicles for elderly and disabled transportation. The partner organization pays for the driver and other operating costs. Partners include multi-service centers, senior centers, sheltered workshops and residential care facilities.

Shared Vehicle Program

Ride Connection lends vehicles to organizations during off-peak hours (evenings and weekends). Ride Connection provides the vehicle and driver training and the borrowing agency provides a driver and pays for fuel. Network partners are asked to make vehicles available to organizations for ongoing and one-time activities through this program.

Retired Vehicle Program

Ride Connection places retired vehicles with governmental jurisdictions and non-profit organizations on the condition that the vehicles will be used to provide transportation to people over 60 years of age and/or people with disabilities. Vehicles can also be made available to Ride Connection partners who need a backup vehicle to support existing transportation services.

Ride Connection retains the titles to the vehicles and helps each organization properly qualify and train their drivers. Vehicle recipients become "partners" in the Ride Connection Network. Funds are available for preventive maintenance and insurance. This program reduces demand on TriMet LIFT services and Ride Connection Network services.

Ride Together Program

This program was developed to allow riders to recruit their own volunteer drivers. After drivers complete the Ride Connection driver approval process and training, they are eligible for mileage reimbursement. Ride Together allows riders access to longer distance, evening, weekend, inter-county, cross-country and other trips which are challenging to provide due to capacity restrictions or because they are outside the regular door-to-door service window.

Mileage Reimbursement

All service partners who utilize volunteer drivers pay mileage reimbursement. The reimbursement rate varies. Volunteers also have the option of deducting the expense on their taxes.

Caused-based Volunteer Recruitment

Ride Connection is continually looking at new ways of recruiting volunteers to support elders and people with disabilities in the community.

American Cancer Society

The American Cancer Society and Ride Connection are working together to provide transportation resources for individuals receiving cancer treatment in the Portland metro area. Volunteers help by driving patients to and from their scheduled treatments while also giving encouragement and support. Recruitment is a joint effort between the American Cancer Society and Ride Connection. Ride Connection provides the scheduling and dispatching and the American Cancer Society provides volunteer management, including mileage reimbursement.

Veterans helping Veterans Volunteer Transportation Program

This program helps buffer the loss of independence by providing no-charge, personalized transportation to veterans as well as their spouses or widows who can no longer drive or use public transportation in Multnomah and Washington Counties. Veterans are recruited to provide transportation to Veterans. If the veteran volunteer chooses to use their own vehicle, mileage reimbursement is available. The goal is to implement this program in Clackamas County this fiscal year.

Fareshare

The fareshare program was developed to provide assistance to those who are unable to pay for fare on the public bus system. Funds are provided to human service agencies and community non-profits to use as match for new or existing fare assistance funds.

Transit Boards

Ride Connection created Transit Boards to promote the use of fixed-route transit service. Transit boards are customized to each site and include a localized map that indicates the closest transit stops, a list of destinations that can be made with few or no transfers, information on the RideWise program and brochures to the transit lines and local service available nearby.

Innovative Transportation Solutions

With the goal of increasing transportation options available to customers, Ride Connection continually researches and adds options to the continuum of transportation services currently available by developing low cost or no cost non-traditional transportation services. In addition to low cost programs which currently exist (i.e. transit boards, shared vehicle program, retired vehicle program, rider's clubs, etc.), the following concepts will be explored for feasibility and implemented if found viable. If concepts are found to produce little or no results, new ideas will be explored.

- Driver support and cessation (i.e. Carfit)
- Capacity building research and implementation
- New volunteer driver program support and implementation

Ride Connection Funding

Ride Connection programs are funded with JARC, New Freedom, TriMet, 5311 federal rural assistance, state Special Transportation Funds, Aging and Disability Services, fare donations, fund raising, interest income, private, Business Energy Tax Credit and charitable contributions. Additionally48,784 volunteer hours (drivers, escort, Ride Ambassadors, committees and admin support) were contributed in FY12, and Ride Connection service partners contributed an additional $2,890,528 to their transportation programs above what they received through Ride Connection.

3 SERVICE GUIDELINES

LAND USE CONCEPT

Originally, the EDTP adopted a Land Use Concept as the strategy to guide the delivery of transportation services. This concept states that:

"A higher level of transportation services for the E&D community is available in areas where the concentration of the E&D population is the greatest. In this strategy, an urban area, city, town or small community would receive more services than those living outside those jurisdictional boundaries—for example, on a farm or in a rural area."

SERVICE STANDARDS/GUIDELINES

In developing the EDTP update in 2009, the STFAC reaffirmed the Land Use Concept and most of the service standards that flow from it. However, there was concern that the word "standard" implies failure if the standard is not met. The STFAC indicated that the standards should not be used in a judgmental manner, because of the great variance among individual communities. As a result, the STFAC changed the word "standard" to "guideline" in order to clarify that the guidelines are goals that providers should strive to meet. They should be used as tools for assessing the level of service currently provided and identifying unmet needs or gaps. While each recommended guideline may not be achieved, it should remain a target for ongoing improvement. The public and policy-makers should not view these guidelines as guaranteed levels of service but rather as ways to measure progress toward an ideal continuum of transportation service.

The STFAC has changed the guidelines from the original EDTP, which divided the service delivery plan between communities within the Urban Growth Boundaries (UGB) and those outside it. Instead, the STFAC eliminated the UGB designation but created separate standards for inside and outside the TriMet district. This change was made because the STFAC recognized that it was not cost-effective or even necessary for some of the smaller communities within the UGB to provide 20-24 hour service. Within the TriMet district, the new guidelines define Frequent Service corridors and local service areas and reduce the span of service for fixed routes. These guidelines better correspond to TriMet's current bus and rail service standards. In addition, the new guidelines reduce the span of service goal inside the district for paratransit provided to non-ADA eligible riders.

In the small communities and rural areas, where the guidelines recommend that service be available five days a week, language has been added to clarify that the guideline does not require only weekday service, but that service could be offered on a Saturday or Sunday, as community needs dictate.

This plan has retained the categories of service available for people with varying degrees of ability to use fixed-route transit. The guidelines address the following categories:

<u>Fixed Route—No to Some Difficulty</u>

This category refers to days and hours of service available to elders and people with disabilities who have moderate or no difficulty using fixed route transit. Outside the TriMet Service District, this service may be provided by fixed route or paratransit service.

<u>Paratransit</u>

E&D No Difficulties: This category refers to days and hours of paratransit service available to elders and people with disabilities in large, small and rural communities outside the TriMet Service District who have no difficulty using fixed route service, but where fixed route service may not be available.

Non-ADA with some difficulty: This category refers to days and hours of paratransit service available to elders and people with disabilities who are not ADA-eligible but who have some difficulty riding fixed route service.

ADA eligible: This category refers to days and hours of complementary paratransit service available to ADA-eligible customers, which must coincide with the days and hours that fixed route transit is available in the area.

Needs Assistance: This category refers to days and hours of paratransit service for those who need assistance, as discussed below.

The EDTP also had a separate standard for people needing assistance, which required fewer days and hours of service because of the extra help provided for the trip. This recommended service exceeds that required by the ADA. The STFAC determined that the term "Needs Assistance passengers" term should be restated as "Needs Assistance customers" and should be more clearly defined as follows:

Needs Assistance customers are elders and people with disabilities who are unable to utilize fixed route service and cannot use demand response services without enhanced assistance, such as an escort or travel assistant, door through door assistance or similar specialized services.

The following are the modified standards, now guidelines, recommended by the STFAC in this CTP.

TRIMET SERVICE AREA

The following guidelines apply within the TriMet service area:

Elders and people with disabilities who are able to use fixed route transit will have these fixed-route services available to them:

- **Frequent Service Corridors.** Bus and rail frequent service, serves main streets and connects regional and town centers identified in Metro's 2040 Plan. Frequent service corridors have population and employment densities that can support 15 minute service 18-22 hours a day, seven days a week, by generating at least 25 boarding rides per vehicle hour on weekdays and 20 boarding rides per vehicle hour on weekends.

- **Standard Service**. Standard service helps meet the need for basic community mobility and provides connections to frequent service routes. Standard service operates on

corridors or in communities with population and employment densities that can generate at least 10 boarding rides per vehicle hour 15 to 18 hours a day, seven days a week.

Elders and people with disabilities who are unable to use fixed route, or who have moderate or major difficulty riding the fixed route system will have these services available to them:

- Additional local curb-to-curb or door-to-door services will be available 10-15 hours a day on weekdays and 8-10 hours a day on weekends. These services will provide local transportation to shopping, nutrition sites, and medical clinics, for example, as well as to fixed route service. Services should generate four boarding rides per vehicle hour.

- ADA Paratransit service is available to people whose disability prevents them from using regular bus and rail service for some or all of their trips and who live within a three quarter mile radius of fixed route service. Service is limited to only those persons who have been determined as eligible according to criteria specified in the ADA law.

- Needs Assistance customers will receive services 10-15 hours a day on weekdays and 8-10 hours a day on weekends. These services may or may not be client specific, but will provide local transportation for a variety of different trip purposes.

OUTSIDE THE TRIMET SERVICE AREA

Large Communities

The following guidelines apply to communities with a population greater than 2,500 outside the TriMet service area.

Elders and people with disabilities with major, moderate, or no difficulty using the fixed route system will receive fixed-route, curb-to-curb, or door-to-door services 10-15 hours a day, six days a week.

Needs Assistance passengers will receive services 8-10 hours a day, five days a week.

Small Communities

The following guidelines apply to communities with a population between 250-2,499 and that are outside the TriMet service area.

Elders and people with disabilities with major, moderate or no difficulty using the fixed-route system will receive regularly scheduled, deviated fixed-route, curb-to-curb or door-to-door services 8-10 hours a day, five days a week, which may include a Saturday or Sunday.

Needs Assistance passengers will receive services 6-8 hours a day, five days a week for medical, work and nutrition trips, and 2-3 days a week for all other trips. This level of service exceeds that required for complementary paratransit under the ADA.

Rural Areas

The following guidelines apply to rural areas, which do not form a contiguous community with a population of 250.

Generally, these areas are not communities but rather small developments surrounded by large tracts of farmland or forests. Because of the sparse population, neither fixed routes nor complementary ADA-paratransit are anticipated under these guidelines.

Elders and people with disabilities living in rural areas, including Needs Assistance passengers, will receive demand response service a minimum of 6-8 hours a day, five days a week for medical, work and nutritional trips, and 2-3 days a week for all other trips. The service may include a Saturday or Sunday.

Summary of Gaps and Current Status of Meeting Gaps

These categories of service, accompanied by the recommended guidelines described below, are summarized in Figure 3-1. Figure 3-2 is an evaluation of how well the region is meeting the new guidelines. Gaps in service exist primarily in the Needs Assistance category, and in local on-demand services for ADA and non-ADA-eligible customers.

Figure 3-1 Service Guidelines Summary

	FIXED ROUTE	PARATRANSIT			
	No to Some Difficulty	E&D No Difficulty	Non ADA Eligible (some difficulty)	ADA Eligible	Needs Assistance
TriMet Service District High Frequency Corridors	18-22 hrs/7 days	N/A	Localized curb-to-curb 10-15 hrs weekdays; 8-10 hrs weekends	Same as fixed route	10-15 hrs weekdays; 8-10 hrs weekends
TriMet Service District Standard Service	15-18 hrs/7 days	N/A	Localized curb-to-curb 10-15 hrs weekdays; 8-10 hrs weekends	22 hrs/7 days	10-15 hrs weekdays; 8-10 hrs weekends
Large Community	10-15 hrs/6 days	10-15 hrs/6 days	10-15 hrs/6 days	10-15 hrs/6 days	8-10 hrs/5 days
Small Community	8-10 hrs/5 days	8-10 hrs/5 days	8-10 hrs/5 days	8-10 hrs/5 days	6-8 hrs/5 days for medical, work and nutrition; 2-3 days for other trips
Rural	N/A	6-8 hrs/5 days for medical, work and nutrition; 2-3 days for other trips	6-8 hrs/5 days for medical, work and nutrition; 2-3 days for other trips	6-8 hrs/5 days for medical, work and nutrition; 2-3 days for other trips	6-8 hrs/5 days for medical, work and nutrition; 2-3 days for other trips

Figure 3-2   Conformance to Service Guidelines

Place	Classification	FIXED ROUTE	ON DEMAND			
			No Difficulty (Public DAR)	Non ADA Eligible (some difficulty) (Public DAR)	ADA Eligible	Needs Assistance (Client services)1
Beaverton	TriMet Service Area (High Frequency &Local)	+	N/A	Short 2.5 hrs. weekdays & No weekend service	+	Short 2.5 hrs. weekday & No Sat. service
Clackamas	TriMet Service Area (Local)	Short 4 hrs. Sundays	N/A	Short 2 hrs. weekdays & Noweekend service	+	Short 2 hrs. weekdays & No Sat. service
Cornelius	TriMet Service Area (High Frequency & Local)	+	N/A	Short 2.5 hrs. weekdays & No weekend service	+	Short 2.5 weekdays & No Sat. service
Durham	TriMet ServiceArea (Local)	Short 5 hrs. Sundays	N/A	Short 2.5 hrs. weekdays & No weekend service	+	Short 2.5 hrs. weekday & No Sat. service
Fairview	TriMet Service Area (Local)	+	N/A	Short 2 hrs. weekdays & No weekend service	+	Short 2 hrs. weekday & No Sat. service
Forest Grove	TriMet ServiceArea (High Frequency & Local)	+	N/A	Short 2.5 hrs. weekdays & No weekend service	+	Short 2.5 hrs. weekday & No Sat. service
Gladstone	TriMet Service Area (High Frequency & Local)	+	N/A	Short 4 hrs weekdays service and No M/Sat/Sun service	+	Short 4 hrs weekdays service and No M/Sat service
Gresham	TriMet ServiceArea (High Frequency & Local)	+	N/A	Short 12 hrs. weekdays & No weekend service	+	Short 2 hrs. weekday & No Sat. service
Happy Valley	TriMet Service Area (Local)	Short 3 hrs. service M-Sa, No service Sundays	N/A	Short 2 hrs. weekdays & No weekend service	+	Short 2 hrs. weekday & No Sat. service
Hillsboro	TriMet Service Area (High Frequency & Local)	+	N/A	Short 2.5 hrs. weekdays & No weekend service	+	Short 2.5 hrs. weekday & No Sat. service

Place	Classification	FIXED ROUTE	ON DEMAND			
			No Difficulty (Public DAR)	Non ADA Eligible (some difficulty) (Public DAR)	ADA Eligible	Needs Assistance (Client services)1
Johnson City	TriMet ServiceArea (Local)	Short 1.5 hrs. service weekdays, No service weekends	N/A	No service	+	*No service*
King City	TriMet Service Area (High Frequency &Local)	Shuttle short 13 hrs weekdays & No service weekends	N/A	Short 2.5 hrs. weekdays & No weekend service	+	*Short 2.5 hrs. weekday & No Sat. service*
Lake Oswego	TriMet Service Area (Local)	Short 5 hrs. weekends	N/A	Short 0.5 plus hrs. weekdays & No weekend service	+	*No Sat. service*
Milwaukie	TriMet Service Area (High Frequency & Local)	+	N/A	Short 2 hrs. weekdays & No weekend service	+	*Short 2 hrs. weekday & No Sat. service*
Oregon City	TriMet ServiceArea (High Frequency & Local)	+	N/A	Short 3 hrs. weekdays & No weekend service	+	*Short 3 hrs. weekday & No Sat. service*
Portland	TriMet ServiceArea (High Frequency & Local)	+	N/A	Short 2 hrs. weekdays & No weekend service	+	*Short 2 hrs. weekday & No Sat. service*
Rivergrove	TriMet Service Area (Local)	Short 3 hrs. service weekdays, No service weekends	N/A	No service	+	*No service*
Sherwood	TriMet ServiceArea (Local)	+ Along Hwy 99	N/A	Short 2.5 hrs. weekdays & No weekend service	+	*Short 2.5 hrs. weekday & No Sat. service*
Tigard	TriMet Service Area (Local)	+	N/A	Short 2.5 hrs. weekdays & No weekend service	+	*Short 2.5 hrs. weekday & No Sat. service*
Troutdale	TriMet ServiceArea (Local)	+	N/A	Short 2 hrs. weekdays & No weekend service	+	*Short 2 hrs. weekday & No Sat. service*
Tualatin	TriMet Service Area (Local)	Short 5 hrs. Sundays	N/A	Short 2.5 hrs. weekdays & No weekend service	+	*Short 2.5 hrs. weekday & No Sat. service*

Place	Classification	FIXED ROUTE	ON DEMAND			
			No Difficulty (Public DAR)	Non ADA Eligible (some difficulty) (Public DAR)	ADA Eligible	Needs Assistance (Client services)1
West Linn	TriMet ServiceArea (Local)	Short 5 hrs. weekends	N/A	Short 4.75 hrs. weekdays & No weekend service	+	*Short 4.75 hrs. weekday & No Sat. service*
Wood Village	TriMet Service Area (Local)	+	N/A	Short 2 hrs. weekdays & No weekend service	+	*Short 2 hrs. weekday & No Sat. service*
Wilsonville	Large Community	Short 3 hrs. Saturday	N/A	Short 3 hrs. Saturday	Short 3 hrs. Saturday	*No Service*
Canby	Large Community	No service on weekends	Short Saturday	Short Saturday	+	*Short 3 hrs weekday service and No Tu service*
Molalla	Large Community	No Sat Service on local route	Short 3 hrs. weekdays & No Sat Service	Short 3 hrs. weekdays & No Sat Service	Short Sat Service	+
Mount Hood Village	Large Community	No Sat Service	No Sat Service	No Sat Service	No Sat Service	+
Sandy	Large Community	+	Short 4 hrs. Sat service	Short 4 hrs. Sat service	+	*Short 3 hrs. service weekdays*
Banks	Small Community	No Service	+	+	+	+
Estacada	Small Community	+	Short 3.5-6 hrs. weekdays, only volunteer service 1 weekday	Short 3.5-6 hrs. weekdays, only volunteer service 1 weekday	+	*Short 1.5-4 hrs. weekdays, only volunteer service 1 weekday*
North Plains	Small Community	No Service	+	+	+	+
Gaston	Rural	N/A	+	+	No Service	+
Rural Clackamas Co	Rural	N/A	Based on volunteer driver and vehicle availability		No Service	*See non-ADA service note*
Rural Multnomah Co.	Rural	N/A	+	+	No Service	+
Rural Washington Co.	Rural	N/A	+	+	No Service	+

Notes: [1]Ride Connection Network service provides door-through-door assistance in some circumstances

CAPACITY GUIDELINES

Standards or guidelines based on the hours that a service is *offered* does not address whether adequate service is *available*. For this reason, in 2009 the STFAC recommended that a new guideline to address capacity be developed.

To identify what capacity problems exist, TriMet previously sent a survey to the network of providers who deliver non-ADA service to E&D riders. The providers responded by listing the following issues:

- There are a limited number of vehicles and drivers to serve large areas over a long span of service.
- Providers cannot always supply the requested ride. They may need to refer a caller to a different service, deny the ride altogether, or renegotiate the time or day of the requested service.
- Providers have had to change scheduled service to meet more pressing ride requests.
- Providers are reluctant to promote their service, because they are at capacity and cannot serve new requests.
- Customers are requesting services for which there is no capacity, such as early morning and evening trips, a shorter scheduling window to request trips, fewer referrals to LIFT, and weekend trips.

In 2009, two Capacity Guidelines were discussed but not adopted:

- **Paratransit Guideline:** Set a limit on the number of unfilled requests per month to determine if additional capacity is needed.
- **Regularly-scheduled Shuttle Guideline:** Count the number of customers compared to the maximum capacity of the vehicle to determine if additional capacity is needed.

At the time, the STFAC recommended that a capacity guideline should be set. However, they determined that not enough information and input from providers was currently available to set the guideline and this is still the case. The following items need to be considered when setting such a guideline:

- Determine whether the guideline should focus only on denials or include referrals and renegotiations.
- The terms should be well-defined and used consistently across providers.
- Consider using the ADA definition for denials.
- Data collection for the guidelines should be easy to collect.
- Decide if data should be collected for requests when the provider is not in operation, such as evenings and weekends, in order to document unmet needs.
- Consider how lack of promotion could be factored into a capacity guideline.
- Allow for flexibility in applying the guideline to areas with different population levels.

4 NEEDS ASSESSMENT

Developing a comprehensive and updated needs assessment is an important part of the planning process. This Elderly and Disabled Transportation Plan focuses on the transportation needs, gaps and challenges specific to persons with disabilities and older adults; therefore, this chapter articulates those needs. Subsequent steps in the planning process will identify strategies or solutions intended to address these needs, and will also serve as the basis and rationale for potential future applications for both federal and state funding sources.

The methodology to prepare the needs assessment is described as follows:

First, this chapter presents a demographic profile of the Tri-County area using 2000 and 2010 data from the U.S. Census and population estimates from the State of Oregon's Office of Economic Analysis. The profile outlines recent and future trends for the total population and older adults in the Tri-County area as well as 2010 Census data for people with disabilities.

Secondly, key stakeholders involved in planning for and delivering transportation services were consulted in order for them to articulate and share their experiences, perceptions and opinions about which needs are most critical to meet. A summary of these comments is included below.

DEMOGRAPHIC PROFILE

Tri-County Area Overview

The Tri-County area has a total population of 1.4 million people. Multnomah County has the largest population, with 735,334 inhabitants in 2010, and grew by 11 percent between 2000 and 2010. Washington County, with 529,710 inhabitants in 2010, grew the most—19%-- between 2000 and 2010, a rate greater than the state of Oregon or the Tri-County area. Clackamas County, the smallest with respect to population, grew by 11% during this timeframe.

Between 2000 and 2030, Washington County is expected to have the highest percentage population growth, 77%, and Clackamas County is expected to grow by 58%. This is considerably higher than the state of Oregon, which is expected to grow by 35% and Multnomah County at 21%[2].

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[2] Population projections come from the Office of Economic Analysis, Department of Administrative Services, State of Oregon. The projections were done using 2000 U.S. Census data and use the following factors: death, fertility, and migration. The model is driven by past population trends and not economic factors.

Figure 4-1   Total Population, 2000-2030

County	2000	2010	2030	% Change 2000-2010	% Change 2000-2030
Clackamas County	338,391	375,992	536,123	11%	58%
Multnomah County	660,486	735,334	800,565	11%	21%
Washington County	445,342	529,710	788,162	19%	77%
Tri-County Area	1,444,219	1,641,036	2,124,850	14%	47%
Oregon	3,421,399	3,831,074	4,626,015	12%	35%

Source: U.S. Census, SF1 (2000, 2010); population estimates: Office of Economic Analysis, Department of Administrative Services, State of Oregon.

Older Adults

As outlined in Figure 4-2, older adults are an important and growing demographic group in all counties, mirroring national trends. In 2010, Clackamas County had the highest percentage of people 65 and older, 14%, above the statewide percentage of 13%. In Multnomah and Washington counties, this population was 11% and 10% of the population respectively.

By 2030, the elder demographic is expected to grow substantially, thereby making up 18% of the population of Clackamas and Multnomah counties, 15% of Washington County, and 17% of the Tri-County area. Despite this projected growth for the area, the demographic is expected to grow even more throughout the state of Oregon to 19%. Clackamas County has the highest percentage of those 85 years and older, 2.1%, higher than the state percentage of 2.0%.

Figure 4-2   Older Adults, 2010-2030

Geographic Boundary	65 or Older (2010)		65 or Older (2030 Projection)		% Change 2010-2030	85+ (2010)	
	Number	%	Number	%		Number	%
Clackamas County	51,231	14%	94,945	18%	85%	7,848	2.1%
Multnomah County	77,423	11%	143,992	18%	86%	12,542	1.7%
Washington County	53,109	10%	118,607	15%	123%	8,315	1.6%
Tri-County Area	181,763	11%	357,544	17%	97%	28,705	1.7%
Oregon	438,177	13%	950,922	19%	117%	77,872	2.0%

Source: U.S. Census, SF1 (2000, 2010); population estimates: Office of Economic Analysis, Department of Administrative Services, State of Oregon.

People with Disabilities

The Census Bureau defines disability as a long-lasting physical, mental, or emotional condition. This condition can make it difficult for a person to do activities such as walking, climbing stairs, dressing, bathing, learning, or remembering. This condition can also impede a person from being

able to go outside the home alone or to work at a job or business. Census data is broken out for the following categories:

- Sensory disability
- Physical disability
- Mental disability
- Self-care disability
- Go-outside-home disability
- Employment disability

All these categories can be considered mobility disabilities and are included in the analysis. It should be noted that Census data does not perfectly capture the number of people with disabilities. There are limitations in part because there is no universal disability definition and it is self-reported.

Figure 4-3 shows Census data for people with disabilities in the three counties and in Oregon in 2010. In 2010, all three counties had lower percentages of people with disabilities than the state as a whole (13%). In Clackamas and Multnomah counties, people with disabilities made up approximately 11% of the population and 9% in Washington County.

Figure 4-3   People with Disabilities, 2010

Geographic Boundary	All	
	Number	%
Clackamas County	42,224	11%
Multnomah County	82,350	11%
Washington County	48,928	9%
Tri-County Area	173,502	11%
Oregon	505,869	13%

Data Source: 2010 ACS 3 year estimate B18101: Sex by Age by Disability Status.

Figure 4-4 shows the percentage of people with a go-outside-the-home disability. On the whole, the state of Oregon had a higher percentage of those with Go-Outside-the-Home disabilities, 5.5%. Of the three counties, Washington County had the lowest at 4.3% and Clackamas County the highest, 5.2%.

Figure 4-4   People with Go-Outside-Home Disability, Non-Institutionalized, 16+ year)Old Only

Geographic Boundary	65 or Older	
	Number	%
Clackamas County	15,174	5.2%
Multnomah County	27,442	5.1%
Washington County	16,523	4.3%
Tri-County Area	59,139	4.9%
Oregon	157,362	5.5%

Data Source: 2007 ACS 3 year estimate B18035: Go-outside-home Disability by Sex by Poverty Status for the Civilian Noninstituionalized Population 16 Years and Over

Growth-Based Needs

As illustrated in the previous figures, there is a need to provide for growing special needs populations. Much of the projected growth in senior populations will be in Washington and Clackamas counties away from the greatest concentrations of public transit service.

Veterans

Another population of concern is that of military community members, including veterans. The total veteran population for the three counties (Clackamas, Multnomah, Washington) is 116,224, which represents nearly 7% of the general population.

Figure 4-5   Veteran Status in the Tri-County Region

Geographic Boundary	Veteran	
	Number	%
Clackamas County	34,875	8.9%
Multnomah County	44,637	5.9%
Washington County	36,712	6.7%
Tri-County Area	116,224	6.9%
Oregon	335,182	8.6%

Sources: US Department of Veterans Affairs, US Census Bureau, 2011

According to the US Department of Veterans Affairs, of the total veteran population, 32% are enrolled with the VA to receive medical care.

STAKEHOLDER CONSULTATION

Two meetings were convened with transportation providers and sponsors of human service transportation, to ascertain additional needs of the populations they serve. The first meeting was attended by human service agency representatives, including Ride Connection, and Clackamas and Multnomah County Departments of Social Services. A second meeting was held with transportation providers representing TriMet, Sandy, Canby, and SMART.

Meeting participants were asked to confirm whether a preliminary list of potential transportation needs was accurate, whether there were additional needs that should be included, and which were most urgent to address. In general, participants agreed that the listing of service needs was accurate; however, clarification was added to some, and some additional needs were included.

It is important to note that, due to declining economic conditions, transit agencies are struggling to maintain existing services and avoid cutbacks. Therefore, additional funding to support public transportation services and programs is seen as the most important need and the most cost-effective way to address a broad spectrum of needs. In addition, filling spatial and temporal gaps (including increasing frequencies) in the public transportation network and promoting access to services are high priorities.

Other specific needs as mentioned by the stakeholders are described below.

Service and Organizational Needs

- Doctor's return trips and/or dialysis trips are the hardest to provide, because there is so little flexibility in arranging for them.

- Trips to/from dialysis treatment centers are difficult to meet as customers are often sick and can't ride long distances, and the demand is expected to escalate over time.

- Ride Connection and their network receive more requests for rides than can be filled. Many ride requests that are received cannot be filled, and are turned down. Customers are called back two days prior to their scheduled ride and told if the trip can be provided.

- Ride Connection and transit agencies/providers do not have enough drivers and vehicles. As a result of growing demand, some trips are prioritized and others are turned down.

- People get discouraged if they have not received the service they need and stop requesting rides; therefore, the demand for services is greater than would be indicated by trip denials or turndowns.

- Some people could use public transit if they could get to or from the station or bus stop ("first and last mile service").

- As mobility management becomes more and more important as an available service for customers, resources will need to be available.

- More evening and weekend public transportation service is needed for all areas/providers.

- Recently, attention has been focused at the national and local level on the transportation needs of veterans, especially the need to provide a range of services to those recently returning from active duty. Services are needed for medical services through veterans programs in addition to other needs.

- Frequency of service is a big issue for many persons with disabilities and for older adults; infrequent service can result in passengers waiting a long time for public transportation, which can be difficult.

- There is an ongoing need for training public transit operators in how to effectively work with older adults, persons with disabilities, and veterans.

Suburban/Rural Transportation Needs

- Some areas (i.e. Boring) have dropped out of TriMet's service area; as a result, some people now receiving LIFT services will no longer be within the ¾ mile of a fixed route, which may put an additional burden on Ride Connection and other providers.

- There are geographic gaps in transit service, particularly in Rhododendron, Government Camp, and Boring. Also, between Rhododendron and the Clackamas County boundary.

- Washington and Clackamas counties are generally hard to serve due to low density and dispersed populations. There are geographic gaps in transit service, particularly in Aloha and Bethany and beyond in Washington County and Corbett and beyond in Multnomah County. TriMet is considering other approaches such as volunteer programs (Ride Connection's Ride Together, and Clackamas County's Senior Companions service).

- TriMet would like to develop a long-term improved service plan for the Westside of Portland, and including some suburban areas of Clackamas County because they are not well served by TriMet now.

- Clackamas and Washington Counties have historically located public housing sites in areas not easily served by transit.

- Lack of active transportation support, such as sidewalks, signage, or connectivity options is a barrier in suburban areas.

Infrastructure

- Gaps in sidewalk networks and/or infrequent or difficult crosswalks were raised as an issue. For example, the new Loaves and Fishes site on Powell is becoming a very busy destination and some customers need to make a mid-block crossing.

- Getting to and from bus stops is a barrier; also the lack of seats or shelters at bus stops.

- Safety and security is important to customers; better lighting and safer environments to wait have been called out as needs.

- Improvements are needed to increase the number of accessible bus stops and to improve the path of travel to get to the bus stop or rail station.

Affordability

- "More affordable service" is implied to be broader than the fare one pays. For example, people need to get to grocery stores that offer competitive prices and in some parts of the region, it is very difficult, or impossible to do so. As a result, low-income people spend more for food than they otherwise would if they had better service. This also results in long trips for a number of providers.

- There is a lack of affordable transportation options in some communities (i.e. taxis).

DEFICIENCIES TO SERVICE GUIDELINES

Figure 3-2 summarizes locations which fall short of meeting service guidelines. Highlights include:

- Cities falling in the TriMet Service Area (Local) category, such as Clackamas, Durham, Happy Valley, Johnson City, Lake Oswego, River grove, Tualitin, and West Linn are mostly well served with fixed-route service throughout the week, but are short by 3+ hours during the weekend.

- King City, which is classified as a high frequency location, fixed route- service is short 13 hours on weekdays and has no service on weekends.

- Large communities such as Canby and Molalla have no weekend fixed-route service.

- The small communities of Banks and North Plains have no fixed-route service at all.

- Nearly all communities were short of complying with service standards for the Non-ADA Eligible (some difficulty) category, with most short at least a few hours on weekdays and mostly lacking weekend service. T hose complying were small and rural communities of Banks, North Plains, Gaston, Rural Multnomah County, and Rural Washington County.

- For the ADA-eligible category, some of the large communities (Wilsonville, Molalla, Mount Hood Village) were short of complying with the guidelines. There is no service at all in Gaston and the rural portions of the counties.

5 STRATEGIC INITIATIVES

This chapter presents a set of strategic initiatives that the tri-county region can pursue to formulate individual strategies. Each of these action areas supports one or more of the original guiding tenets. The following sections highlight the goals and attributes of the strategic initiatives, bringing in research findings and/or case study examples where appropriate. Chapter 6 details the specific strategies that are to be implemented as a result of the plan. Not all of the initiatives described in this chapter will be pursued at this time, based on current needs and available resources.

GUIDING TENETS

As detailed in Chapter 1, the following guiding tenets provide a framework when developing strategies to address regional needs. The identified strategic initiatives will embody one or more of these principles:

- Coordinate
- Innovate
- Involve the Community
- Improve the Service Foundation
- Integrate Land Use and Transportation Decisions
- Improve Customer Convenience
- Improve Safety

ENCOURAGE USE OF FIXED ROUTE TRANSIT

This initiative emerged as a key theme throughout this planning process. A regional workshop was convened to further explore barriers that may prevent people from using fixed route services, as well as strategies which, if implemented, could encourage use of regularly scheduled transit services. A peer review was also conducted of five transit agencies that have already implemented projects such as those described below; a full report of the Peer Review conducted for this study is included as Appendix F.

A summary of lessons learned as expressed by the peer agencies is included below.

- Although difficult to quantify, three of the five agencies estimated the number of trips diverted to fixed route that would otherwise have been provided on paratransit, and the resulting cost savings. These financial benefits accrue over time, as each person successfully transitioned to fixed route will potentially take many trips. It should be noted, however, that it is not known how many trips diverted to fixed route services were actually taken.

- Begin implementation of conditional eligibility (trip screening) gradually, and develop the process in phases; take the time to make sure that it is developed in a way that works for each area

- Make sure that the conditional eligibility process has been thoroughly refined before beginning trip-by-trip screening

- Technology plays an important role by allowing the development of trip plans and reducing the need for frequent site visits

- The peer agencies expressed similar experiences as TriMet regarding barriers to using fixed route for older adults and persons with disabilities—namely, there is a lack of knowledge about the fixed route system, and perceptions about safety and personal security.

- It is important to note that additional staffing and/or training requirements, investments in technology, etc., may be necessary to successfully launch and staff these efforts. The staffing costs associated with implementing the strategies need to be considered when assessing overall program savings.

Many people who currently use paratransit services for all their travel needs may be able to used fixed-route, or other regularly scheduled transit service for some or all of their needs. The following services and initiatives will help encourage the use of more efficient modes of travel where appropriate.

Implement Trip Screening and Path of Travel Review

Since the development of the last update, TriMet has taken steps to implement a new ADA paratransit eligibility process and has opened a Certification Center to ensure applicants for paratransit are accurately assessed for their eligibility to use ADA paratransit services, and conditions under which they are eligible.

As a next step, TriMet, as well as other regional providers, could consider implementing trip screening for persons who are determined "conditionally" eligible, or able to use fixed route transit for at least some of their trips. As evidenced by TriMet's peers, this step should be taken in tandem with a path of travel review process, which would evaluate an individual's ability to get to or from a bus stop or rail station.

Bus Stop Improvements

TriMet has already embarked on a strategic plan to improve many of its bus stops to ensure they are better accessible for older adults and people with disabilities. Efforts should continue to identify those locations with high ridership and the most potential for improvement. Local stakeholders identified the need to improve access to and from bus stops—as well as improving the stops themselves-- a major barrier preventing their use of fixed route transit. Making improvements such as adding benches or seats, providing real-time scheduling information, ensuring that the path of travel to the bus stop can be navigated by persons with disabilities, ensuring the bus stop platform can accommodate persons in wheelchairs, and making sure shelters are transparent to promote personal security are tangible steps that can be taken.

Paratransit Feeder Services

Customers who are able to use the fixed route but have trouble accessing the bus stops can be picked up and taken to the nearest transit center to access the fixed route services to other local destinations. Feeder service can greatly reduce trip lengths on paratransit services and free up resources for other trip requests. Transfers to fixed-route services should only be done at improved transit centers to assure customers are not overly inconvenienced by the transfer. Also only customers capable of making the transfer should be required to feed into the fixed-route service. This would require an assessment of the customer's capability to use fixed-route for the trip, and their ability to access their final destination from their destination stop/station. This assessment can be part of the trip screening and path of travel review steps described in the following Demand Management section.

Route Deviation

In a route deviation, a bus goes off its course to go to a specific location on a pre-scheduled request. By surveying riders using paratransit services to travel to senior centers and sheltered workshops, transit operators can determine if a route deviation would allow many of the riders to instead use the less-expensive fixed route buses. Riders could be given incentives to make the switch to fixed-route buses.

MANAGE ADA SERVICE DEMAND

Review LIFT and other providers' service standards

Currently, the LIFT program exceeds minimal ADA service standards in several ways, including:

- Fares are less than minimally required (twice fixed route fare)
- Service provided is door-to-door rather than curb-to-curb

Through this approach, options would be explored to better align LIFT service standards with ADA guidelines.

As with the strategy to revise the paratransit certification process, it is important to carefully review options and to assess the potential impacts revisions of service standards would have on customers and potential customers of paratransit services. To the extent possible, these impacts should be quantified; that is, the eventual outcomes predicted and measured (i.e. number of trips that would not be provided). A range of scenarios should be reviewed with TriMet's advisory committees and other stakeholders with the goal of prioritizing those most feasible to implement.

Likewise, a "safety net" should be developed in parallel to implementation of this strategy to allow for customers to access transportation in limited cases when they have no other option. The voucher system, described below, may be one way to provide this safety net of limited services, or through volunteer or other programs administered through Ride Connection.

This strategy could apply to other operators as well.

Develop Comprehensive ADA Paratransit Eligibility Process

Since the development of the last Plan Update, TriMet has taken significant steps to refine its ADA paratransit eligibility process, and has opened a Certification Center. Other service providers may be interested, as well, in making revisions to their certification processes.

There are two primary goals for this strategy:

- To ensure that persons are accurately and appropriately provided with the best mobility option based on their needs and conditions; and
- To ensure that ADA paratransit costs and resources are directed to those who meet eligibility standards as defined in the ADA.

Certification staff from other cities/programs that transitioned to an in-person assessment have emphasized the need for public outreach and education to current and potential users of the system, as well as to social service agencies.

Community-Based Accessible Vans

Making accessible vans available to community-based organizations often provides a lower cost, and more customer-focused alternative to traditional ADA complementary paratransit service. Transit providers can provide new or retired vehicles to the organizations for use with their staff or volunteer drivers. Some programs require a commitment from the community-based organization that they will take a quantifiable number of rides off of the ADA system. Ride Connection offers these programs, which could be expanded at great benefit and low cost to the region.

ENHANCE PEDESTRIAN ACCESS/LAND USE IMPROVEMENTS

Pedestrian-Friendly Environment

It is human nature to want to be self-reliant. Our society should take advantage of this desire to be independent by fostering ways for older adults and people with disabilities to remain healthy and active. Not only will the result be happier individuals, but also the limited funds for E&D transportation will last longer and be available for those who truly need assistance.

This CTP encourages jurisdictions within the tri-county area to make their communities more pedestrian friendly for E&D populations. In keeping with the Land Use Concept, the plan advocates locating housing for elders and people with disabilities near services, such as grocery stores, pharmacies and support services, so that residents could walk instead of drive to obtain their basic needs. Specific resources to implement these innovations include:

Livable Communities Evaluation. This AARP evaluation guide includes a "walkability" survey to assess sidewalks, crosswalks, resting places and similar issues.

Pedestrian Master Plan. The City of Portland has adopted a 20-year *Pedestrian Master Plan* for pedestrian improvements, which can serve as a model for other communities. The plan includes a process for prioritizing improvements. The *Portland Pedestrian Design Guide* that was produced in conjunction with the pedestrian plan is used in the development review process.

ADDRESS SAFETY AND SECURITY CONCERNS AT TRANSIT FACILITIES AND ON VEHICLES

Improving access to bus stops and rail stations can remove physical barriers preventing riders from using fixed-route services, but customer perceptions about their personal safety may limit the use of these services. The following actions can improve safety and deter crime, and equally as important can address the perceptions of transit as unsafe which are often not the case.

- **Improve lighting.** Adequate lighting at, and around, bus stops and rail stations can both deter crime and provide riders with a better sense of personal security.

- **Improve visibility.** Eliminating hidden areas at stops, on platforms and along access paths will provide similar benefits. Avoiding opaque shelter walls and managing landscaping are two primary tools for providing clear lines of sight to transit users while accessing or waiting for a bus or train.

- **Improve communications with transit security personnel.** Clearly identified and easy to use voice communications with security personnel can reduce response time in case of an emergency and provide riders with a better sense of security. Similarly video cameras can deter crime if would be offenders think the public space if being monitored, and riders appreciate knowing they are not isolated.

- **Provide public information on transit safety and security.** The perception of transit as unsafe is frequently not supported by the facts. Providing the public, especially potential users, with current data on crimes and accidents on transit vehicles and at transit facilities can often mitigate unfounded concerns.

IMPROVE INFORMATION AND REFERRAL/PROGRAM OUTREACH

While all transit agencies and Ride Connection have improved the service information on their websites since 2006, a number of additional actions can be taken to increase public awareness of transportation services for elders and people with disabilities within the region.

Provider websites review

For those with Internet access, websites can provide important information about the transportation services available to meet individual travel needs. The tri-county region's community-based organizations could provide a link on their websites to TriMet and Ride Connection's sites.

TriMet can improve the information provided on its website to include Ride Connection's shuttle services as well as fixed route bus, rail and LIFT services. Ride Connection should provide more information on what services it provides and how to access those services on its website.

PROVIDE VEHICLE AND DRIVER ALTERNATIVES

One of the difficulties in serving a growing population of residents who have transportation difficulties is a shortage of vehicles or drivers. The following programs help increase the availability of vehicles and drivers.

- **Taxicab Vouchers.** Taxi discount programs for older adults and people with disabilities allow residents to purchase vouchers at less than the face value and use them to pay for taxi rides.
- **Driver Pools.** Agencies could share drivers by establishing a pool among the three counties. Paid drivers who have free hours or days could enter the pool, as well as volunteer drivers willing to dedicate additional hours. The region has consistently supported this approach.
- **Volunteer Driver Programs.** Volunteers have long been relied upon in the delivery of public transit services in small communities and rural areas. Public agencies and non-profit organizations often oversee programs to recruit, train, schedule, and/or reimburse volunteer drivers. Volunteer drivers can sign up to drive organization vehicles or their personal cars. Similarly they can volunteer to drive any customer needing a ride or just friends or family members based on the program parameters.
- **Peer Programs.** The recruiting and retaining of volunteer drivers is often difficult and expensive. Involving peers of the program participants (e.g. older adults and veterans) has proven beneficial in reaching out to new volunteers as they can relate to the needs of their peers and are more motivated in helping out.

ENHANCE SERVICES FOR PEOPLE WHO STAY AT HOME

Another way of looking at mobility is to think of ways to instead bring the services to the person. This type of service can be particularly important to people who temporarily stay at home because of limited mobility, fragile health, etc.—for example, after surgery—or people whose mobility has become very restricted over the long-term, such as those with a debilitating illness. The goal is to help people who stay at home "age in place"—that is, help them to remain in their homes rather than institutionalize them. Currently, the following services are available:

- Grocery deliveries
- Meals on Wheels
- Library book deliveries

Information about these services should be incorporated into transportation providers' programs. The services are a piece of a multimodal strategy for mobility, reflecting the mobility needs of the "whole person" as people transition through various stages of age and disability.

COORDINATED PLANNING & OPERATIONS

Within TriMet and other public transit systems, analysis of TriMet's LIFT and the other transit agencies' ADA eligible ridership should continue to be undertaken to identify where clusters of elders and people with disabilities are located, their travel patterns, common origins and destinations, and to identify paratransit users who also are served by the DMAP medical transportation program (MTP) and Ride Connection network. The service planning objectives of such assessments include the following:

- Identify opportunities to reconfigure existing fixed routes and amenities to better serve the needs of the transit dependent.
- Identify opportunities for developing deviated fixed route options, service routes or other flexible service designs to enhance local community and fixed route access by the E&D population.

- Identify opportunities to reduce individually dispatched trips by grouping riders and introducing neighborhood circulators, shopping shuttles or other hybrid transit services.

Within the Ride Connection Network

Ride Connection could implement many of the recommendations included in this updated CTP by expanding the existing planning process with its network partners to target identified underserved and unserved communities and populations. Some specific strategies include the following:

- **Expand Partner Capacity:** Ride Connection can serve as an incubator, a role that involves identifying potential partner agencies in the community, training the managers and professional staff, and nurturing the operation initially to insure success.

- **Expand Accessible Vehicle-Sharing and Volunteer Drivers:** Partners have indicated that underutilized vehicles should be made more available to fill service gaps. Incentives, such as eligibility for a small pool of discretionary funding or credits toward grant funding, could be designed to reward vehicle-sharing among partners. In addition, partners have identified a need for more drivers. Making presentations to service clubs and also developing a driver incentive program might recruit more volunteer drivers.

- **Group Medical Trips:** Establish a program to assist medical clinics and hospitals to group rides and schedule treatments around transportation for patients, particularly those who are receiving life-sustaining medical procedures (e.g., dialysis, chemotherapy and radiation).

Intra-Regional Strategies

A number of actions can be taken that would promote connectivity between Ride Connection and TriMet, and between Ride Connection, TriMet and other transit agencies in the region.

- **Joint Service Planning:** Several community shuttles have been developed as a result of neighborhood needs assessments and cooperative planning efforts between TriMet and Ride Connection. Those joint planning efforts should be expanded, particularly in areas identified as underserved, in communities where there are overlapping trips by LIFT and Ride Connection partners, and in more isolated areas within the region that have only limited fixed route service.

- **Regional ADA Eligibility & Reciprocity:** A concerted effort should be undertaken by the five transit agencies in the region to further explore the feasibility of regional ADA eligibility, an approach that was originally suggested in the EDTP. Many customers need to travel across the region for a variety of trips. Sometimes transfers are required, resulting in need for certification by multiple jurisdictions, eligibility reciprocity between agencies and/or expanded visitation rules. Some agencies provide complete cross-region travel eliminating the need for eligibility (and fare) reciprocity. Both SMART in Wilsonville and Sandy Transit bring people into the TriMet district medical centers and use STF funds to cover these costs.

- **Coordination with Private Sector**: Opportunities should be explored to develop new partnerships with private businesses. Cooperative agreements could be created to provide group trips or subscription services to area groceries, pharmacies, technical training schools, medical centers, and shopping centers. Increased communication and planning with retirement homes, foster care homes, assisted living centers, and nursing homes

could result in more coordination between public transit and these private transportation services. For example, joint scheduling or sharing of vehicles could potentially result in cost savings for both the public and private sector.

- **Coordinate Scheduling of Rides:** Each of the transit agencies in the region and many of the 30 plus community-based transportation agencies that make up Ride Connection's partner network currently handle their own ride requests and operate separate call centers. In addition, each of the three counties schedules rides independently for elders, veterans and other client groups. The STFAC encourages the consolidation or centralizing of several of these call-taking functions, where it would increase efficiency without compromising service quality.

- **Centralize Network Information:** Efforts should continue, in addition to coordinating scheduling of rides, to developing a centralized information system that can be accessed by people needing information on applicable mobility resources for them.

- **Coordination with Medical Facilities:** Efficiencies could be realized by better coordinating medically-related trips with medical facilities, with the goal of developing a more flexible scheduling approach. For example, anecdotal evidence suggests that there is currently duplication of service to major medical facilities or clinics, such as dialysis centers. There may be opportunities to work with staff from the clinics to facilitate grouping of trips where appropriate, in order to avoid service redundancy. Another example relates to coordinating the transportation of patients being discharged from hospitals. Currently, when such trip requests are not coordinated, the patient may be required to stay longer than necessary in the medical facility, which is inefficient use of medical facilities and an inconvenience to the patient.

- **Coordinated Care Organizations (CCOs):** This strategy is evolving as a result of implementation of legislation passed by the Oregon State Legislature in 2011 which authorized the establishment of Coordinated Care Organizations (CCOs). The CCOs will provide medical services to those enrolled in the Oregon Health Plan (including Medicaid recipients) under a different model than what now exists. It will be important for local public transit service operators to track efforts to facilitate transportation for Medicaid recipients under this new model.

  Recently, TriMet hosted a meeting attended by CCO, State of Oregon and County Departments of Social Services to begin a collaborative dialogue in expression of support for the CCO's mission, and to present information about the existing DMAP brokerages as well as services provided by Ride Connection and others.

IMPROVE REGIONAL CONNECTIVITY

Improved customer connectivity between systems is important for improving special transportation needs services. Many travel patterns are considered regional in nature, or are corridor-based, meaning trips may begin in one area (county, city) and end in another. Trips requiring a transfer from one system to another can be time-consuming and inconvenient, and difficult for persons with disabilities. Connectivity improvements should address travel for passengers both on fixed route and paratransit programs.

Interagency Coordination

Through Canby Area Transit's (CAT) partnership with South Metro Area Regional Transit (SMART) they were able to utilize SMART buses already traveling through Canby to provide local service in the northwestern section of town. CAT is a fareless service. So customers traveling locally in Canby do not have to pay a fare. SMART keeps track of these fare amounts and bills CAT for the fares. This arrangement allowed CAT to provide more service where it was needed without cutting any existing service.

Additionally, CAT and Ride Connection signed a shared vehicle agreement so the Adult Center bus can be used for a CAT back-up when it is available.

Early fare reciprocity discussions between Sandy Transit and TriMet in 2008 were promising.

6 STRATEGIES

INTRODUCTION

This chapter presents and discusses strategies intended to address or mitigate transportation needs for older adults and persons with disabilities as identified in Chapter 4 (Needs Assessment). This is an important element of the Elderly and Disabled Transportation Plan in that it responds to federal planning requirements specific to Coordinated Public Transit-Human Services Transportation Plans; in addition, it provides an opportunity to document regional service priorities as well as to identify lead entities responsible to implement them.

The methodology used to develop the strategies included taking the following steps:

- Consultant staff reviewed strategies included in previous plan updates to assess whether they have been completed, or are more appropriately considered ongoing agency activities. Those that fell into either category were removed from the table of strategies.

- Early in this planning process, TriMet and other service providers expressed interest in learning more about innovative ideas to encourage use of fixed route transit by older adults and persons with disabilities. A facilitated workshop, hosted and attended by the STFAC, was convened to identify potential barriers preventing use of fixed route, as well as steps that could be taken to enhance use of transit. As a result, a number of new strategies are included in the Plan.

- A peer review was conducted of five transit agencies throughout the country that are known to have implemented such strategies in order to learn about their experiences.

- Meetings were held with TriMet, Ride Connection, and other regional transportation providers (including Canby Area Transit, Clackamas County Department of Social Services, South Clackamas County Transportation District, Sandy Area Transit, and South Metro Area Regional Transit) to identify those strategies as most critical to support the goals of enhancing transportation for older adults and persons with disabilities.

- The STFAC was consulted and provided an opportunity to respond to the draft list of strategies.

GUIDING PRINCIPLES

The development of these strategies is based on the following guiding principles:

- The highest priority for service providers is to preserve existing services and to avoid further service reductions
- Adequate capital replacements must be accounted for
- Transportation providers intend to maintain their process to ensure strategic and equitable distribution of available funding

- Additional funding is needed to support operations and capital investments
- Given escalating demand, efforts should be taken to increase capacity of existing programs

As mentioned, this Plan update has streamlined the number of strategies by removing those that are considered completed and, in some cases, those that are considered ongoing tasks and responsibilities of local service providers. Several new strategies, especially to encourage the use of fixed route transit, have been added. The strategies are also assigned a "tier" ranking. Tier 1 projects are those considered of high priority to the region and the most feasible to implement. Tier 2 projects are considered short-medium term with potential funding sources to implement them. Tier 3 projects are those that will require long-term implementation efforts, and where funding is not secured.

Figure 6-1 lists the strategies, estimated cost to implement the strategy, suggested lead agency or agencies to assume responsibility for implementation, the timeframe for completion, and the suggested tier. It should be noted that while some strategies will require an initial investment to implement them, over the long term they may actually result in cost-savings to public transit programs.

They are organized into the following topic areas along with the guiding tenets addressed in each topic area:

- Maintain Existing Services and Programs
  - Improve the Service Foundation
- Expand or Establish New Services and Programs
  - Innovate
  - Improve the Service Foundation
- Encourage use of Fixed Route Transit
  - Improve the Service Foundation
  - Improve Customer Convenience
  - Improve Safety
- Enhance Pedestrian Access/Land Use Improvements
  - Integrate Land Use and Transportation
  - Improve Safety
- Promote Coordination among Service Providers
  - Coordinate
  - Innovate
- Improved Information and Referral/Program Outreach
  - Coordinate
  - Innovate
  - Improve Customer Convenience

Figure 6-1   Strategies

Strategy	Estimated Cost	Next Step	Responsible Party	Time Frame	Tier 1	Tier 2	Tier 3
Maintain Existing Services and Programs							
Preserve existing cost-effective services and preventive maintenance	A minimum of $1.5 million per year additional funds needed per year	Identify additional revenue and prioritize services	Transit agencies and Ride Connection	Ongoing	x		
Provide for adequate capital replacements	A minimum of $3.0 million additional funds needed per year	Identify and prioritize funding sources	Transit agencies and Ride Connection	Ongoing	x		
Seek stable funding in upcoming legislative session to support ongoing operations and capital expenses	N/A	Develop and participate in regional and statewide advocacy and education efforts	Transit agencies, human service agencies, Ride Connection	2012-13 legislative session	x		
Expand or Establish New Services and Programs							
Address service gaps in public transit services	Significant costs, depending on nature of project; will require new revenue	Prioritize service cuts to be re-initiated; seek additional funding	Transit agencies, Ride Connection	Ongoing		x	
Identify long-term sustainable funding for service in Boring	$56,000 per year	Implement and evaluate one-year grant to offset service reduction	Clackamas County, transit agencies	2012-2013	x		
Restore frequency of service of recently reduced transit services	$6 million a year (net of fares)	Prioritize service cuts to be re-initiated; seek additional funding	Transit agencies	Ongoing		x	

Strategy	Estimated Cost	Next Step	Responsible Party	Time Frame	Tier 1	Tier 2	Tier 3
Identify Veterans and military community transportation barriers and develop plan to address needs.	$413,000	Conduct needs assessment; build coalition with relevant agencies and advocacy groups	Ride Connection	2012-13	x		
Safe Driving for Seniors: offer classes and provide transit information at these events	$2,000/yr materials, fees, and meetings	Work with AARP and other trainers, CarFit (company adapting cars for older adults)	Ride Connection/area hospitals/DMV/ senior centers	Ongoing		x	
Increase capacity of existing volunteer programs	Depends on level of effort	Develop coalition of partner agencies; design and launch collaborative website	Ride Connection and county departments of social services	Ongoing	x		
Develop back-up driver pool for existing volunteer driver programs	Depends on level of effort	Develop work plan and proposed plan of approach	Ride Connection	Ongoing	x		
Continue to provide mobility support through programs like Travel Coach, Travel Training, etc. and expand as possible.	TBD	Continue and build upon current efforts	Ride Connection,	Ongoing	x		
Develop and implement new or revised no cost/low cost community services projects	Depends on project	Develop specific projects in response to identified needs	Ride Connection, transit agencies	Ongoing	x		
Develop and implement new transportation services to assist low-income individuals access employment and training opportunities in rural areas	Depends on project	Track federal legislative action on transportation authorization bill; JARC program guidelines expected to change	Rural transit agencies, Ride Connection, TriMet	Ongoing		x	

Strategy	Estimated Cost	Next Step	Responsible Party	Time Frame	Tier 1	Tier 2	Tier 3
Develop and test new technology to improve service efficiencies	Depends on project	Track industry trends, learn from peers	Ride Connection, transit agencies	Ongoing		x	
Develop open source software to enable multiple operators to connect with single clearinghouse	$100, 000 (Phase I)	Create new software, develop advisory group, build on partnerships	Ride Connection	Ongoing	x		
Encourage Use of Fixed Route Transit Services							
Implement or expand upon feeder services to fixed route transit	Need to analyze investment and savings potential	Develop service plans; consider pilot project	Transit agencies with Ride Connection partners	Begin 2013		x	
Implement trip screening as appropriate for LIFT users	Need to analyze investment and savings potential	Prepare a plan, conduct research, develop preliminary goals	TriMet and other transit agencies, if interested	Begin 2013	x		
Coordinate path of travel improvements with LIFT eligibility center	Need to analyze investment and savings potential	Prepare a plan, identify key locations needing improvement	TriMet and other transit agencies, if interested	Ongoing	x		
Address perception of personal safety for new or potential users of fixed route transit	Depends on scope of project	Develop public relations campaign, informational materials	Transit agencies	Ongoing		x	
Create a safer transit environment	Depends on scope of project	Improve lighting and implement other safety and security improvements; coordinate with transit security personnel	Transit agencies	Ongoing		x	

Strategy	Estimated Cost	Next Step	Responsible Party	Time Frame	Tier 1	Tier 2	Tier 3
Enhance Pedestrian Access/Land Use Improvements							
Create aging-friendly streets and highways	Significant costs depending on nature of project	Work with local jurisdictions to fill gaps in system providing sidewalks, lighting, paths, crosswalk and other improvements	TriMet and other transit agencies to coordinate with partners; work with local planning staff	Ongoing		x	
Implement recommendations emerging from Pedestrian Master Plans: safe routes to transit and to encourage walking by older adults and people with disabilities	Significant costs, depending on nature of the project	Prioritize impacts of improvements to benefit persons with disabilities, older adults	TriMet and other transit agencies to coordinate with partners	Ongoing		x	
Develop strategies (i.e. incentives, mutual planning requirements, etc.) to influence facility siting locations.	Staff costs	Conduct assessment of current zoning and permit processes that influence facility siting practices	Transit Agencies with Metro and local jurisdictions	Ongoing	x		
Promote Coordination Among Service Providers							
Coordinate with private sector: joint scheduling or sharing of vehicles	Staff time	Develop pilot—e.g., contact assisted living facility with vehicle	Ride Connection, transit agencies	Ongoing		x	
Coordinate with medical facilities and E&D transportation consumers and their representatives to optimize trip scheduling	Staff time	Develop information for medical providers illustrating opportunities to work with transit providers and coordinate customer travel schedules	Ride Connection, TriMet MTP, transit agencies, Coordinated Care Organizations	Ongoing	x		

Strategy	Estimated Cost	Next Step	Responsible Party	Time Frame	Tier 1	Tier 2	Tier 3
On-Line Vehicle Reservation System: to share Ride Connection accessible vehicles Increase use of shared vehicles	Up to $71,250 one time cost for 25 vehicles + $30,000/year wireless fees for online system	Program development; find on-line software vendor	Ride Connection	Not started		x	
Expand awareness of home delivery services (i.e. groceries, library) to people who stay at home in order to assist with "aging in place"	Staff costs; could result in cost savings to transit agencies	Continue collaboration and coordination between transit and human service agencies	Social service agencies, Ride Connection	Ongoing			x
Continue program to provide assistance for people whose primary barrier to using public transit is financially based.	Depends on scope of project	Implement fare mitigation program or other steps to assist such riders	Ride Connection, social service providers and transit agencies throughout the Tri-County area	Ongoing		x	
Coordinate outreach and advocacy activities with CCO development	N/A	Continue discussions with CCOs, County Departments of Social Services, State OHA	Ride Connection, TriMet and other transit providers	Begin 2013-14	x		
Improved Information and Referral/Program Outreach							
Develop and distribute transit options brochure and other web-based information systems	$25,000 printing	Update and continue distribution of brochure; update web site	Ride Connection, TriMet and other transit agencies	Ongoing		x	
Increase outreach efforts to make members of the public and policy-makers aware of rural transportation options	None	Determine # of locations & outreach	Ride Connection and rural transit agencies	Ongoing		x	

7 FINANCIAL PLAN

As a result of this demographic shift described in Chapter 4, the demand for specialized transportation services will grow with the elderly population, and more costly services, such as door-to-door transportation will be needed.

The most expensive of these services is ADA complementary paratransit; a paratransit ride costs ten or eleven times that of fixed route. In addition, on fixed route, additional trips can be provided at no cost until the capacity of the vehicle is reached, while on complementary paratransit, ridership growth results in a commensurate increase in service and vehicle purchases.

TRIMET COSTS AS AN EXAMPLE

TriMet provides a typical example. TriMet's ability to increase fixed route service as the region expands is severely constrained. In fact, although paratransit growth has leveled off since FY08, revenues from the increase in the payroll tax rate have been used at TriMet to meet the demand for paratransit service since 2005, which means less money for expanded bus service. Paratransit could require 40% of new revenues by 2017. Yet most elders and people with disabilities used fixed route transit and their numbers have been growing.

Today, elders and people with disabilities take TriMet bus and MAX 11.0 million times a year. By comparison, LIFT provides 1.0 million rides a year and at much greater cost. While a fixed route ride costs TriMet about $1.48 net of fares, a one-way ride on LIFT costs an average of $28.32 to provide (net of fares and includes operating costs only).

Since 2000 the tri-county region has worked to stem the growth of paratransit demand and provide for the future by adding good, low cost services for elders and people with disabilities and investing in fixed route accessible service, community based services, shuttles, and more and better places for customers to wait.

Following are some of the steps that have been taken, and the resulting savings:

- The RideWise program teaches individuals with cognitive, vision and multiple disabilities throughout the region how to safely use bus and MAX. Without travel training, many people with disabilities will be dependent on door-to-door paratransit.

- RideWise saves TriMet up to $5.0 million a year in LIFT costs. As new individuals are travel trained, savings are growing $.5 million a year.

- All regional transit agencies provide tools to help people with disabilities ride bus and MAX. There are bus line identifiers for blind customers to alert the driver, schedules available in large print and on audiocassette, bus stop and MAX location and directions available for downloading for users of Sender Group's Braille Note or VoiceNote GPS wayfinding devises, securement straps available for wheelchair users, operators trained in

disability awareness and sensitivity training and how to provide the best ride for elders and people with disabilities.

- The region sponsors community-based transportation that includes a 1) vehicle only program 2) a partner program 3) community-based shuttle services 4) a donated vehicle program.

  - Vehicle Only Program: State of Oregon Special Transportation Funds (STF) pay for the vehicles, while partner agencies provide the service. Partner agencies include Providence ElderPlace, LifeWorks, Port City Development Center, Edwards Center and West Linn. This program saves the region almost $1.4 million a year in ADA paratransit operating costs.

  - Partner Program: Ride Connection and 15 community based organizations provide 210,000 door-to-door rides a year for medical, shopping, exercise, social trips. For some trips, volunteers stay with customers at medical appointments. TriMet provides $1 million a year to support these services. STF and federal Title XIX funds also support these services. TriMet saves nearly $3.4 million a year in LIFT service costs due to these services.

  - Community Shuttles: Often, public transit is the only option for people with disabilities. In many communities, people need transportation to get to the bus and MAX and some need to get around in their communities where there is no fixed route service. Ride Connection operates six shuttles to serve elders and people with disabilities. Services are provided at low cost by community-based organizations such as Project Linkage, American Red Cross, and Urban League. In FY12, 65,000 rides were provided. This program saves nearly $1.1 million a year in LIFT operating costs. Two more community shuttles were started with New Freedom funds in 2008.

  - Donated Vehicle Program: TriMet and Ride Connection donate their retired vans and shuttle buses to non-profit organizations and churches to provide rides for elderly and people with disabilities. Many of these rides would have been provided on more expensive paratransit. Michael's Place provides 16,000 rides a year to children with cognitive disabilities while Emmanuel Temple received two donated vehicles and uses them to bring individuals with disabilities to church and to community events.

  - Total savings of the above is approximately $11 million a year.

Other actions to encourage people with disabilities to use fixed route include:

In person eligibility assessments to help TriMet more accurately determine when and under what conditions individuals with disabilities can and cannot use fixed route based on their function abilities began April 2010.

TriMet began increasing the LIFT ADA paratransit fare to be equal to adult fixed route fares in increments of $.30 April 2011.

STATE SPECIAL TRANSPORTATION FUND (STF) PROGRAM

The TriMet STF area receives approximately $13.5 million in STF formula and discretionary funds a biennium. STF funds have played an important role in the expansion of community-based services for elders and people with disabilities the last five years as well as in the preservation of fixed route and complementary paratransit services:

- STF formula funds have permitted areas outside transit district boundaries to provide transportation to people who don't have service.
- STF formula funds have permitted non-profit transportation providers to hire paid drivers, improving the reliability of the service over that which can be provided with volunteers.
- STF formula funds have permitted transit agencies outside the TriMet district to add routes to better serve elders and people with disabilities.
- STF discretionary funds support several innovative services in the Portland area, such as RideWise travel training, the North/Northeast RideAbout, Elders-in-Action Customer Service Monitoring, and several new Ride Connection partner services.

Since 2000, continuing STF formula and discretionary funds have been flat. TriMet recognized in the early 2000s that with growing needs and flat funds, the best use of STF funds would be to work with Ride Connection to develop low cost innovative programs that could reduce the growth of LIFT costs. As these programs were developed, TriMet began to take reductions in STF formula revenues to keep Ride Connection's providers whole (TriMet takes $1.4 million less today than in 2000). Ride Connection's customers are LIFT eligible and keeping Ride Connection's providers whole prevents shifting of rides to LIFT.

Beginning in FY04, discretionary STF funds were allocated to Ride Connection's innovative RideWise travel training program (started late FY04), the NE Shuttle program and open source scheduling technology to better coordinate provider transportation.

TriMet then contracted with Ride Connection to provide additional innovative, low cost programs also designed to reduce the demand for LIFT. These services are funded with TriMet's approximately $500,000 annual allocation of FTA New Freedom funds. New Freedom has funded mid-Multnomah county and Beaverton shuttles (services began early FY09), a donated vehicle program (FY09), Ride Together (FY10), and several cause based volunteer programs (Vets Helping Vets (FY11), American Cancer Society chemotherapy transportation (early FY09)).

The strategy has been successful. Between FY00 and FY08 LIFT costs grew approximately 11% per year. Between FY08 and FY12, LIFT costs grew just .7% per year. Had the FY00-FY08 trend continued, LIFT operating costs in FY12 would have been approximately $9 million higher and FY13 costs would be approximately $11 million higher than they are. The downward trend began several years before LIFT began in-person eligibility assessments or increased the LIFT fare.

STF formula funds cover 3% of transit agencies' costs of door-to-door services for elders and people with disabilities. The STF formula program supports about 46% of the City of Sandy's paratransit costs; 52% of Wilsonville's; 41% of Canby's; and 2% of TriMet's paratransit costs.

PROJECTED FUNDING NEEDS

The STF program funding has not kept up with increasing paratransit costs. Serving the growing population of elders and people with disabilities will require more money.

- The tax base supporting STF formula funds is a declining source of revenue. Additional funding will be needed just to maintain services at current levels and provide inflation

increases to providers. The STF formula structural imbalance is $300,000 in FY13 growing to $1 million in five years

- The state discretionary STF program also remains a flat source of revenue. This program does not provide enough funding to continue existing services and provide for on-going vehicle maintenance and replacements. The deficit averages $3.4 million a year between 2013 and 2022.

- An additional $2 million a year for innovative services could help curb the growth of paratransit services and provide a cost effective foundation for the future as the region's elderly population increases.

8 CONCLUSION

LOOKING BACK

This document provides an update on the status of TriMet's and other regional public transit operators' efforts in providing transportation services for elderly persons, and for persons with disabilities within the three-county region. As evidenced from this Plan, such efforts are wide-spread and varied, and build upon years of previous experience by many local stakeholders, human service agencies, and advocates to advance them to the next level. Many challenges will continue to face these service providers as the population ages, more people will require specialized transportation services, and resources remain scarce due to a faltering economy. At the same time, it is also important to step back and take note of significant accomplishments and improvements that have—and are—taking place since the original Elderly and Disabled Transportation Plan was completed.

Many such initiatives include those undertaken by Ride Connection. Ride Connection and its partners increased the level of coordination and efficiency of transportation services for older adults and people with disabilities in the region in part by capitalizing on economies of scale centered on Service Center activities.   Some examples of efforts implemented by Ride Connection or other agencies include:

- Ride Wise, a travel training program administered by Ride Connection, provides a valuable service by training persons to use fixed route transit, thereby greatly enhancing their independence and at the same time making good use of the region's accessible infrastructure.
- Rider's Voice was published, which provides stories and testimonials in photographic format from persons who have received such training and serves as a powerful tool to encourage training.
- Web improvements at Ride Connection have resulted in a more interactive web site which is easier to navigate, and provides more information that previously was the case.
- Ride About programs have been initiated by Ride Connection to address specific geographic service gaps by providing a hybrid fixed-route and door-to-door service.
- Transit Boards have been installed in many senior centers to provide information to seniors about their transportation options.
- Transit Options Brochure is another valuable tool that explains various travel options.
- Ride Together is a program initiated by Ride Connection that provides mileage reimbursement to eligible transportation providers.
- A retired vehicle program provides vehicles that would otherwise have been sold to eligible non-profit agencies to provide trips directly for their clients.

- A "cause-based" volunteer recruitment program now solicits volunteers based on the type of service they want to provide. This approach has proven effective in that volunteers are more likely to continue.
- TriMet realized full implementation of its Mobility Center, which has resulted in a more comprehensive and accurate paratransit certification process.
- TriMet has initiated a bus stop improvement project, and has identified priority locations for improvements.

LOOKING FORWARD

Chapter 6 outlines strategies for the region to focus on in order to continue to make improvements in how services are provided. Figure 6-1 provides a "roadmap" of such strategies included in the following categories:

- Maintain Existing Services and Programs
- Expand or Establish New Services and Programs
- Encourage Use of Fixed Route Transit Services
- Enhance Pedestrian Access/Land Use Improvements
- Promote Coordination Among Service Providers
- Improve Information & Referral/Program Outreach

These strategies were developed through consultation with service providers and with the STFAC, the citizen's advisory committee that provided guidance and input throughout this planning process. The range of strategies recognize the importance of maintaining existing services and programs, but also in seeking to expand them in order to meet growing needs. Each strategy identifies a potential lead agency, next steps for implementation, a cost estimate, and indicates the relative priority for implementation.

The STFAC is encouraged to track the progress of implementing the strategies and to regularly report on the status of implementation so that this "roadmap" remains relevant and current, and accurately reflects the joint efforts to advance the status of service delivery for older adults and for persons with disabilities.

In the process of preparing this Plan update, Coordinated Care Organizations (CCOs) have been established. In June 2011, the Oregon State Legislature passed House Bill 3650 to propose a statewide system of CCOs. These organizations are intended to manage all of the care for Oregon Health Plan members in their communities. The goal of the legislation is to create a new model of health care that will improve health and also lower the high cost of care by emphasizing prevention, and reducing waste.

CCOs are charged with oversight of all medical and related approved services, including the provision of transportation. While the implications this will have on the current Medicaid brokerage system is still evolving, it will be important for service providers and the STFAC to carefully monitor the new system to ensure (1) it does not result in cost-shifting or providing additional burdens on TriMet and other service providers; and (2) that CCOs are able to take full advantage and help build upon the current brokerage expertise and existing infrastructure. TriMet, local CCO representatives and other key stakeholders have begun a dialogue to ensure there is mutual support for each others' goals and these efforts are expected to continue over the coming months.

Finally, it is important to note that federal legislation replacing SAFETEA-LU (MAP-21) has made some changes with programs subject to this plan; for example, JARC and Section 5311 funding will be combined into one fund source, and New Freedom and Section 5310 funding will be combined into one fund source. Further guidance from FTA regarding new requirements is still pending.

APPENDIX A
List of Acronyms

Appendix A Acronyms

AAA	Area Agency on Aging (sometimes called triple "A")
AARP	American Association of Retired Persons
ADA	Americans with Disabilities Act
ADS	Aging & Disabilities Services
ANT	Advocacy Network for Transportation
APTA	American Public Transit Association
AT	Assistive Technology
ATP	Accessible Transportation Program
AVL	Automatic Vehicle Location
BPA	Blanket Purchase Agreement
CAD	Computer Aided Dispatch
CASD	Computer Aided Scheduling and Dispatch
CAT	TriMet Committee on Accessible Transportation
CCAM	Coordinating Council on Access and Mobility
CCS	Catholic Community Services
COLCO	Columbia County Transportation
CTAA	Community Transportation Association of America
CTP	Community Transportation Program
DAS	Department of Administrative Services
DAVS	Disabilities, Aging, and Veterans Services (Washington County)
DDC	Defensive Driving Course
DFWA	Drug Free Workplace Act
DHS	Department of Human Services
DOT	Department of Transportation
DR/DRT	Demand Response Transportation (paratransit)
E&D	Elderly and Disabled
EDTP	Tri-County Elderly and Disabled Transportation Plan
EMO	Ecumenical Ministries of Oregon
EMS	Emergency Medical Services
FHWA	Federal Highway Administration (also FHA)
FR	Fixed Route

FTA	Federal Transit Administration
GIS	Geographic Information System
GP	General Public (related to FTA 5311 Funds)
GPS	Global Position Systems (typically satellites)
ITP	Individual Trip Planner
ITS	Intelligent Transportation Systems
JARC	Job Access Reverse Commute
JPACT	Joint Policy Advisory Committee on Transportation
JPO	Joint Program Office (FTA & FHWA)
LAN	Local Area Network
LCDC	Land Conservation and Development Plan
LED	Light Emitting Diode
MAAP	Mobility Awareness and Assistance Program
MDT/MDC	Mobile Data Terminal/Mobile Data Computer
MFS	Metropolitan Family Services
MSAA	Mobility Services for All Americans
MTP	Medical Transportation Providers
NOVAA	Northwest Oregon Volunteer Administrators Association
NPR	National Public Radio
NTI	National Transit Institute
OCF	Oregon Community Foundation
O D	Original-Destination
ODOT	Oregon Department of Transportation
OMAP	Oregon Medical Assistance Program
OPB	Oregon Public Broadcasting
OTA	Oregon Transit Association
OTN	Oregon Transportation Network
PDA	Personal Data Assistant
PDC	Portland Development Commission
PDOT	Portland Department of Transportation
POV	Privately Owned Vehicle
PSA	Public Service Announcement
PTAC	Public Transit Advisory Committee

PTD	ODOT Public Transit Division
PTO	Portland Transportation Options
QIC	Quality Improvement Committee
RFP	Request for Proposal
RFQ	Request for Qualification
RSVP	Retired and Senior Volunteer Program
RTAP	Rural Transportation Assistance Program
RTP	Regional Transportation Plan
RTCC	Regional Transportation Coordinating Council (committee for Tri-County E&D Plan)
RVTD	Rogue Valley Transportation District
SAFETEA-LU	Safe, Accountable, Flexible, Efficient Transportation Equity Act: A Legacy for Users Federal authority to appropriate general revenues and to spend trust fund monies through limitations on obligations, for highways and transit, on an annual basis for Fiscal Years 2005-2009.
SAIL	State Wide Alliance for Independent Living
SMART	South Metro Area Rapid Transit
SPD	Seniors and People with Disabilities (formerly SDSD)
STF	Special Transportation Fund (Discretionary and Formula)
STFAC	Special Transportation Fund Advisory Committee
STP	Surface Transportation Programs
STIP	Surface Transportation Improvement Projects
TAC	Technical Advisory Committee
TACS	Technical Assistance for Community Services
TDD	Telecommunications Device for the Deaf
TDM	Transportation Demand Management
TPAC	Transportation Policy Advisory Committee
TSP	Transportation System Plans
TRP	Transportation Reaching People
TTY	Text Telephone
UWR	United We Ride
VAN	Vehicle Area Network
VCS	Volunteer Chore Services
WLAN	Wireless Local Area Network

WSDOT	Washington State Department of Transportation
WVDO	Willamette Valley Development Officers
§ 5309	Federal funds provide assistance for the establishment of new rail transit projects, improvement and maintenance of existing rail transit and other fixed-guideway systems, buses and other bus-related capital projects
§ 5310	Federal funds ensure the right that elderly citizens and people with disabilities have to utilize public transportation facilities and services
§ 5311	Federal funds can be used for planning, capital, operating and administrative assistance to state agencies, local public bodies, nonprofit organizations, Native American organizations and operators of public transportation in non-urbanized areas with populations less than 50,000

APPENDIX B

Public and Community Transportation Glossary

Appendix B Glossary

Accessibility	The extent to which facilities, including transit vehicles, are barrier-free and can be used by people who have disabilities, including wheelchair users.
Administrative assistance	Funding that supports the administrative costs related to a program activity, such as office expenses, insurance, legal expenses, bookkeeping, and administrative staff expenses.
ADA	Americans with Disabilities Act: Passed by the Congress in 1990, this act mandates equal opportunities for persons with disabilities in the areas of employment, transportation, communications and public accommodations. Under this Act, most transportation providers are obliged to purchase lift-equipped vehicles for their fixed-route services and must assure system-wide accessibility of their demand-responsive services to persons with disabilities. Public transit providers also must supplement their fixed-route services with paratransit services for those persons unable to use fixed-route service because of their disability.
ADA Eligible	ADA Eligible refers to eligibility for complementary fixed route paratransit. Individuals who qualify must be unable to used fixed route due to a disability.
AoA	Administration on Aging. The agency within the U.S. Department of Health and Human Services that oversees the implementation of the Older Americans Act, including senior nutrition programs, senior centers and supportive services for elders.
Boarding Rides	Boarding rides are counted each time a person enters a vehicle. Boardings and rides all refer to boarding rides.
Boarding Rides per Vehicle Hour	The number of boardings divided by the vehicle hours of service. Describes a route's productivity.
Brokerage	A method of providing transportation where riders are matched with appropriate transportation providers through a central trip-request and administrative facility. The transportation broker may centralize vehicle dispatch, record keeping, vehicle maintenance and other functions under contractual arrangements with agencies, municipalities and other organizations. Actual trips are provided by a number of different vendors.
Complementary Paratransit	Paratransit service that is required as part of the Americans with Disabilities Act (ADA) which complements, or is in addition to, already available fixed-route transit service. ADA complementary paratransit services must meet a series of criteria designed to ensure they are indeed complementary.
Coordination	A cooperative arrangement between transportation providers and organizations needing transportation services. Coordination models can range in scope from shared use of facilities, training or maintenance to integrated brokerages or consolidated transportation service providers.
Corridors	The Corridor concept is from the 1997 Regional Framework Plan. Corridors are not as dense as centers, but also are located along good quality transit lines. They provide a place for densities that are somewhat higher than today and feature a high quality pedestrian environment and convenient access to transit. Typical new developments would include row houses, duplexes and on to three story office and retail buildings, and average about 25 persons per acre.

Curb-to-Curb Service	A common designation for paratransit services. The transit vehicle picks up and discharges passengers at the curb or driveway in front of their home or destination. In curb-to-curb service the driver does not assist the passenger along walks or steps to the door of the home or other destination.
Demand-Response Service	The type of transit service where individual passengers can request transportation from a specific location to another specific location at a certain time. Transit vehicles providing demand-response service do not follow a fixed route, but travel throughout the community transporting passengers according to their specific requests. Can also be called dial-a-ride. These services usually, but not always, require advance reservations.
Deviated Fixed Route	This type of transit is a hybrid of fixed-route and demand-response services. While a bus or van passes along fixed stops and keeps to a timetable, the bus or van can deviate its course between two stops to go to a specific location for a pre-scheduled request. Often used to provide accessibility to persons with disabilities.
Disability	The limitation of normal physical, mental, social activity of an individual. There are varying types (functional, occupational, learning), degrees (partial, total) and durations (temporary, permanent) of disability.
Door-to-Door Service	A form of paratransit service which includes passenger assistance between the vehicle and the door of his or her home or other destination. A higher level of service than curb-to-curb, yet not as specialized as door-through-door service (where the driver actually provides assistance within the origin or destination).
Fare Box Revenue	A public transportation term for the monies or tickets collected as payments for rides. Can be cash, tickets, tokens, transfers and pass receipts. Fare box revenues rarely cover even half of a transit system's operating expenses.
Fixed-route	Transit services where vehicles run on regular, pre-designated, pre-scheduled routes, with no deviation. Typically, fixed-route service is characterized by printed schedules or timetables, designated bus stops where passengers board and alight and the use of larger transit vehicles.
Frequent Service	TriMet service that operates every fifteen minutes or better, every day. 16 bus routes and all MAX lines meet this level of service.
FY (Fiscal Year)	In Oregon, public agency Fiscal Years start on July 1 of the preceding calendar year. FY 2005 is from July 1, 2004 to June 30, 2005.
Guaranteed Ride Home	Program that encourages employees to carpool, use transit, bike or walk to work by guaranteeing them a ride home in case they cannot take the same mode home (e.g., if they need to work late or if an emergency occurs).
Homebound	Those unable to leave home without exceptional effort and support. One of the requirements to qualify for Medicare home health care.
Independent Living Facility	Rental units in which services are not included as part of the rent, although services may available on site and purchased by residents for a fee.
JARC (Jobs Access Reverse Commute)	Federal formula funds available to provide transportation to assist low income individuals get to work.

Match	State or local funds required by various federal or state programs to complement funds for a project. A match may also be required by states in funding projects, which are joint state/local efforts. Some funding sources allow services, such as the work of volunteers, to be counted as an in-kind funding match. Federal programs normally require that match funds come from other than federal sources.
Medicaid	Also known as Medical Assistance, this is a health care program for low-income and other medically needy persons. It is jointly funded by state and federal governments. The Medicaid program pays for transportation to non-emergency medical appointments if the recipient has no other means to travel to the appointment.
New Freedom	Federal formula funds for transit agencies to provide services to people with disabilities that are above and beyond what the ADA requires.
Paratransit	Types of passenger transportation that are more flexible than conventional fixed-route transit but more structured than the use of private automobiles. Paratransit includes demand-response transportation services, subscription bus services, shared-ride taxis, car pooling and vanpooling, jitney services and so on. Most often refers to wheelchair-accessible, demand-response van service.
Service Route	Another hybrid between fixed-route and demand-response service. Service routes are established between targeted neighborhoods and service areas riders want to reach. Similar to deviated fixed routes, service routes are characterized by flexibility and deviation from fixed-route intervals. However, while deviated fixed routes require advanced reservations, service routes do not. A service route can include both regular, predetermined bus stops and/or allow riders to hail the vehicle and request a drop-off anywhere along the route.
Special Transportation Fund (STF)	State funds for transportation for elderly and people with disabilities.
Total Transit System	TriMet's term for all of the attributes that make transit an attractive choice for riders, including customer information, easy access to transit, comfortable places to wait, high quality transportation (frequent, reliable, comfortable), safety and security.
Trip	A one-way movement of a person or vehicle between two points. Many transit statistics are based on unlinked passenger trips, which refer to individual one-way trips made by individual riders in individual vehicles. A person who leaves home on one vehicle, transfers to a second vehicle to arrive at a destination, leaves the destination on a third vehicle and has to transfer to yet another vehicle to complete the journey home has made four unlinked passenger trips.
Urban Growth Boundary (UGB)	The UGB controls urban expansion onto farm, forest and resource lands. Metro, the regional government, manages the UGB as required by state law.
Vanpool	A prearranged ridesharing service in which a number of people travel together on a regular basis in a van. Vanpools may be publicly operated, employer operated, individually owned or leased.
Vehicle Hours	Vehicle hours include revenue hours plus the time it takes a vehicle to travel from the garage to the end of the line.

APPENDIX C
Special Transportation Fund Advisory Committee (STFAC)

Appendix C Special Transportation Fund Advisory Committee (STFAC)

The STFAC is TriMet's appointed advisory committee to assist the agency in its duties as the Special Transportation Fund Agency (STF Agency) for Clackamas, Multnomah and Washington Counties. As required by the STFAC Bylaws, STFAC members reside in the tri-county area, are knowledgeable about the transportation needs of the elderly and people with disabilities, and are users of or familiar with public or community based transportation services. More than one-half of the members are elders or persons with a disability.

Membership Category Description	Members
Those interested persons who are members of the TriMet Committee on Accessible Transportation (CAT), excepting the CAT member who is a Board member	Jan Campbell, Chair Claudia Robertson, Vice Chair Leon Chavarria-Aguilar Zoe Presson Beth Nagy-Cochran
Seniors or persons with disabilities who reside in Clackamas County	Dick Jones Joseph Lowe
Seniors or persons with disabilities who reside in Multnomah County	Stan Lewis Raissa Moore
Seniors or persons with disabilities who reside in Washington County	Annette Pepin Ross Matthews
Seniors or persons with disabilities who reside outside the TriMet District	Ruby Ancheta Glenn Koehrsen
Staff representatives of the respective County Agencies on Aging and Disability; one per county	Teresa Christopherson, Clackamas County Stephanie Spann, Multnomah County Jeff Hill, Washington County
Staff representative of TriMet	Susan Florentino
Staff representative of Ride Connection	Elaine Wells
Staff representative of public transit entities other than TriMet	Julie Stephens, City of Sandy Cynthia Thompson, City of Wilsonville
Members at Large (3)	DavidKeyes Ron Thompson George Payne

APPENDIX D

Special Transportation Fund Advisory Committee (STFAC) Meeting Agendas

Agenda

Date: **Friday, December 2, 2011**
Time: 9:00a – 12:00p
Place: ODOT Public Meeting Room
123 NW Flanders Portland
Public Meeting Room, 1st Floor

- Introductions (10 minutes)

- Agency updates (50 minutes)

  - Ride Connection

  - Sandy Area Transit

  - Canby Area Transit

  - South Clackamas Transportation District

  - SMART

  - TriMet

- Elderly & Disabled Transportation Plan Update
  (Connie Soper / Scott Chapman, 60 minutes)

- Journey to the Bus Stop (Jessica Engelmann, 45 minutes)

- Public Comment (15 minutes)

Agenda

Date: **Friday, March 2, 2012**
Time: 9:00 a.m. – 12:00 p.m.
Place: ODOT Public Meeting Room
123 NW Flanders Portland
Public Meeting Room, 1st Floor
Topic: EDTP

- Introductions (10 minutes)

- Background of EDTP (Claire Potter) (15 minutes)

- Planning framework (Scott Chapman)   (15 minutes)

- Updated Needs Assessment (Connie Soper) (15-20 minutes)

- Progress on Strategies and Program Activities (Connie Soper) (20 minutes)

- Break (15 minutes)

- Workshop Planning (20 minutes)
    a. Preliminary Agenda
    b. Broader public and customer input

- Update on TriMet's Eligibility Process (Kathy Miller) (20 minutes)

- Public Comment (15 minutes)

STFAC Workshop
ENHANCING THE USE OF
FIXED ROUTE TRANSIT

Date: **Friday, April 20, 2012**
Time: 9:00 a.m. – 12:00 p.m.
Place: ODOT Public Meeting Room
         123 NW Flanders Portland
         Public Meeting Room, 1st Floor

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1. Introductions and Review of Agenda

2. Small Group Discussion #1: What barriers prevent persons with disabilities and older adults from using fixed route transit services?

3. Report back key findings

4. Break

5. Presentation on Best Practices

6. Guest Speaker: Tim Renfro, ADA Administrator, Pierce Transit

7. Small Group Discussion #2: What strategies would be most beneficial for TriMet and other local transit agencies to implement, and why?

8. Report back key findings

9. Next steps/Wrap Up

Special Transportation Fund Advisory Committee (STFAC) Meeting

Date: **Friday, July 13, 2012**
Time: 9:00 a.m. – 12:00 p.m.
Place: ODOT Public Meeting Room
123 NW Flanders Portland
Public Meeting Room, 1st Floor

1. Introductions and Review of Agenda (STFAC Chair)   9:00-9:15

2. EDTP Update: Review and Comment on Needs Assessment and Strategies (Connie Soper and Scott Chapman)

    9:15-10:00

3. Peer Review Key Findings (Connie Soper)   10:00-10:15

4. Break   10:15-10:30

5. Process Improvement – How to Identify Opportunities for Savings and Developing a Work Program (Glenn Koerschen and Claire Potter)

    10:30-11:00

6. TV Highway Path of Travel Improvements (Young Park)

    11:00-11:30

Meeting 1: Regional CCOs & Medical Transportation
(Optional for STFAC members)
Meeting 2: STFAC Comments on EDTP

Date: **Friday, September 28, 2012**
Time: 9:00 a.m. – 12:00 p.m.
Place: ODOT Public Meeting Room
           123 NW Flanders Portland
           Public Meeting Room, 1st Floor

I.   9:00 am – 10:30 am meeting

The meeting from 9:00 am to 10:30 am is <u>optional</u> for STFAC members. The purpose of the meeting is for county, transit provider, and CCO staffs to meet and discuss how to get CCO clients to medical appointments

1. Introductions
2. Benefits of the regional medical transportation brokerage (Gail Bauhs, 15 minutes)
3. How Ride Connection can help the CCOs meet their transportation needs (Julie Wilcke, 15 minutes)
4. Impact of cost shifting (Claire Potter, 5 minutes)
5. Group discussion – how to work together to have a successful CCO startup January 1 2013 and to keep medical transportation convenient and affordable (55 minutes)

II.   10:30 am to 12 noon meeting

The meeting from 10:30 am to 12:00 noon is to review the draft Elderly and Disabled Transportation Plan document and receive comments from the STFAC.

1. Connie Soper will review the changes made to the EDTP and take comments on the plan from the STFAC

APPENDIX E
Ride Connection Partner Network

Appendix E Ride Connection Partner Network

PARTNERS

Clackamas County

- Clackamas Transportation Consortium
- Canby Adult Center
- City of West Linn
- Friends of Estacada Community Center
- Gladstone Senior Center
- Hoodland Senior Center
- Lake Oswego Adult Community Center
- Milwaukie Center
- Molalla Adult Community Center
- Neighbor Link
- Pioneer Community Center
- Sandy Senior and Community Center
- Transportation Reaching People (TRP)
- Edwards Center (client- based services only)

Multnomah County

- American Cancer Society (providers service in all three counties)
- African American Chamber Of Commerce
- American Red Cross
- David's Harp (client-based services only)
- Emmanuel Temple
- Ride Connection East County U-Ride
- Metropolitan Family Service (MFS) - Project Linkage
- Neighborhood House
- Northwest Pilot Project
- Port City Development Center (client-based services only)
- Portland Impact
- Impact NorthWest
- Providence ElderPlace (client-based services only)
- Urban League of Portland
- •Ride Connection NW/SW Downtown Portland Service

Washington County

- American Red Cross
- City Ride (BPA Provider)

- **Edwards Center (client-based services only)**
- LifeWorks Northwest\Michael's Place (client-based services only)
- Pacificab (BPA Provider)
- **Ride Connection Washington County U-Ride**
- **Tualatin Valley Workshop (client-based services only)**
- **Maryville Nursing Home (client-based services only)**
- **Itiya Express (BPA Provider)**

APPENDIX F
Peer Review

Appendix F Peer Review

OVERVIEW

Nelson\Nygaard Consulting Associates contacted five public transit agencies considered peers to TriMet in order to learn about strategies those agencies have implemented to encourage ADA-eligible people (fully or conditionally eligible) to take fixed-route service when possible. The agencies contacted include: King County Metro (Seattle, WA), Pierce Transit (Tacoma and Pierce County, WA), Utah Transit Authority (Salt Lake City, UT), Regional Transit Authority (RTA, Chicago, IL), and Washington Metropolitan Area Transit Authority (WMATA, Washington, DC).

The agencies were interviewed to learn more about their programs, barriers encountered when implementing them, and lessons learned which may help TriMet should it wish to initiated similar efforts. This summarizes some of the high-level findings from these discussions. The individual write ups include more detailed information about the agencies' approach to conditional eligibility and encouraging paratransit-eligible individuals to take fixed-route service.

FINDINGS

Conditional Eligibility and Trip Screening

This strategy refers to implementing trip-by-trip eligibility for persons who are considered conditionally eligible and therefore able to take fixed-route transit for at least some of their trips. Under this process, a transit agency may opt to refer a conditionally eligible person to fixed-route transit as applicable, and provide paratransit trips in other cases. Persons may be conditionally eligible based on weather conditions, variable health conditions, the presence of architectural/street design barriers that prevent access for some trips, or other conditions as determined in the initial screening. To date, TriMet has not conducted trip screening; however, the new certification process can help identify potential candidates and records conditions that could trigger the screening.

All of the agencies interviewed have developed a conditional eligibility process and with the exception of WMATA (which established the process in 2010) have been using it for about 10 years. Agencies have mostly phased in their trip screening process gradually, using more obvious conditions (i.e. Time of Day or Time of Year) first, and developing a more robust screening process over time.

Path of Travel Review

Path of travel review is a more complicated approach to trip screening that involves assessing the customer's ability to get from his or her point of origin to the nearest bus stop or rail station and to their final destination.

Some people are conditionally eligible for paratransit based on the fact that they cannot always get to/from the bus stop. Therefore, when possible it behooves transit agencies to try to assess and evaluate the person's path of travel and consider correcting these barriers (i.e. installing a curb cut) when possible as a one-time infrastructure improvement will most likely offset the cost of providing multiple paratransit trips or offering an alternate path of travel.

Typically path-of-travel review involves creating a trip plan for a specific trip in which the path of travel has been reviewed keeping in mind the passenger's unique conditions. The trip plan is kept in the computerized scheduling program so that when an individual requests a trip, the trip plan is available to the scheduler. If not, a new trip will need to be created using desk-top tools and/or a site visit.

Three of the agencies—Pierce Transit, King County Metro, and Utah Transit Authority—do path-of-travel trip screening.

Pierce Transit

Pierce Transit completes 240-400 trip plans each month and completed approximately 4,400 in 2011. They use a range of trip planning tools, including:

- **Automated fixed-route trip planning software**: Provides information about distances, routes, and accessibility features.
- **Bus stop inventory**: They have a bus stop database with information about accessibility, including photos.
- **Google Earth**: They utilize Google Earth for some path-of-travel review.
- **Site assessments**: When more information is required they go out into the field and walk the path of travel to review for barriers.
- **Travel training**: When educating customers about using the system, someone evaluates the individual's path-of-travel from home to the nearest bus stop.
- **Common destination accessibility database**: Pierce Transit recommends assessing popular destinations and determining the closest bus line and cataloging accessibility information.

King County Metro

Trip-by-trip screening began in 2005 once the conditional eligibility process had been sufficiently developed and refined. The comprehensive eligibility process is a foundation for trip screening. It is enabled by a computerized program that alerts mobility planners when a conditionally eligible person has taken the same trip three times. (They began at 12 trips, but reduced this number over time). This indicates that this person's trip history should be reviewed to see if fixed-route service could be appropriate for the repeated trip. If it is determined that the person is capable of taking this trip via fixed-route service, the passenger will be sent an individualized trip plan explaining the fixed-route service to be taken and a path of travel map. The estimated cost of performing conditional eligibility and trip screening in 2011 was $320,000.

When generating an individualized trip plan, a site visit may need to be conducted in order to determine if the path is appropriate for the conditionally eligible passenger. Barriers are identified in the following ways:

- During a site visit(tools include a wheel to measure feet and a level to measure slope)
- Using existing information stored in the database/GIS
- When reported by an individual requesting a trip.
- Google Maps' Streetview is utilized when doing initial research, but a site visit is required to judge and measure slope, surface condition, etc. As the barriers database is developed, the need for site reviews diminishes and more desktop reviews can be performed.

In 2008, Accessible Services performed 1,371 desktop reviews and by 2011, they performed 2,527. During this time, the field review rate decreased from 39% to 24%.

Utah Transit Authority

Utah Transit Authority also performs path-of-travel review. When conditionally eligible individuals call to schedule a paratransit trip, they are required to identify which condition qualifies them for the trip. A site visit confirms the barrier and identifies potential alternate paths that are suitable to the individual's identified conditions. Each path-of-travel assessment is a three-hour process and costs about $100. UTA performs approximately 200 path-of-travel reviews each year.

Feeder Service

Feeder Service refers to providing transit service (usually via a paratransit vehicle) to transport persons from a central location (i.e. housing complex, park and ride, school, etc.) to mainline transit. Once there, the customer can use the regular bus or rail service. Of those agencies interviewed, only Utah Transit Authority and Pierce Transit are using paratransit feeder service to encourage paratransit-eligible riders to use fixed-route services.

UTA applies the ADA guidelines strictly to provide the minimum amount of paratransit service needed. They utilize paratransit feeder service for portions of a trip that cannot be made by fixed-route service, even very small trip segments, such as getting someone across an intersection.

Pierce Transit provides feeder service and estimates that the cost of feeder trip is about $19 per trip. Pierce Transit uses transit centers as well as park & rides for feeder service because they provide a variety of amenities, such as shelter, seating, and restrooms and are accessible transfer points.

Safety Measures

A barrier mentioned by many throughout this planning process is the perception that using public transit is not always safe or secure. Some people fear for their personal safety, or have other concerns (especially for new users of public transit) that they don't know how to use the service, may get lost, etc. This concern is also experienced by the peer agencies contacted. They report that it is common practice for the transit agencies to have a security force/transit police as well as cameras at stations or on buses.

Other Strategies

All of the agencies perform travel training and find it to be a useful strategy in encouraging ADA-eligible people to use fixed-route services.

In addition, the following outlines various other strategies used to encourage fixed-route ridership:

- Providing free or reduced fares on fixed-route service for paratransit-eligible individuals with an ID. (Nearly all of those interviewed)
- Conducting outreach to senior centers and human service agencies to try to attract people to fixed-route before they apply for paratransit eligibility (Nearly all of those interviewed)
- Conducting sensitivity and disability awareness training for fixed-route drivers. (Utah Transit Authority)

Key Findings

A summary of lessons learned as expressed by the peer agencies is included below:

- Begin conditional eligibility slowly and develop the process in phases; take the time to make sure that it is developed in a way that works for each area
- Make sure that the conditional eligibility process has been thoroughly refined before beginning trip-by-trip screening
- Technology plays an important role by allowing the development of trip plans and reducing the need for frequent site visits
- "Don't think that unpaved means unusable"—many people can walk without much problem on gravel roads.
- Pierce Transit recommends getting the disability advocates and stakeholders involved in the eligibility and appeals process in order to build support
- Pierce Transit has not found it necessary to do in-person functional assessments for everyone determined conditionally eligible; although they recommend them when other approaches produce inadequate or contradictory information.
- The peer agencies expressed similar experiences as TriMet regarding barriers to using fixed route for older adults and persons with disabilities—namely, there is a lack of knowledge about the fixed route system, and perceptions about safety.
- Although difficult to quantify, three of the five agencies estimated the number of trips diverted to fixed route that would otherwise have been provided on paratransit, and the resulting cost savings. These financial benefits accrue over time, as each person successfully transitioned to fixed route will potentially take many trips.
- It is important to note that additional staffing and/or training requirements, investments in technology, etc., may be necessary to successfully launch and staff these efforts. The staffing costs associated with implementing the strategies need to be considered when assessing overall program savings.

A summary of the peer agency interview findings is provided below.

	WMATA	UTA	Pierce Transit	King County	RTA/PACE
Eligibility Process	The eligibility process was formerly handled by an outside contractor and they were granting trip requests too liberally. WMATA brought this function in-house to screen more carefully.	3,400 eligible riders; have been performing in-person functional assessments since 2000. Complete 1200/yr.	Began eligibility process in 1990s. Functional assessments are used for 12% of applicants.	In 2011, Accessible Services received 670 applications each month or 8,027 for the year. Of those, 5,110 completed their in-person evaluation or got a letter of determination.	Pace processes an average of 1200 ADA paratransit applications per month. 40,000 are currently eligible; about 25,000 use paratransit services regularly 10,000-12,000 are certified each year
Conditional Eligibility and Trip Screening	Since 2010, have been screening for Time of Day, Time of Year, and Variable Health	Began imposing conditions of eligibility when fleet became fully accessible. Started slowly and expanded screening process.	19% of applicants are found to be conditionally eligible.	Began conditional eligibility process in 2001. They began gradually and eventually developed and refined 17 conditions for which paratransit applicants could be screened.	Pace has been implementing conditional eligibility for 10 years, but doesn't enforce. They rely on passenger to understand their own condition and call only when they cannot make the trip using fixed-route service. They do seasonal screening based on date fields.
Path of Travel	No	Caller identifies barrier when requesting paratransit trip. Costs $100/trip plan. 200 done each year. Have been doing since 2005.	Have been doing since 1996. In 2011, 270-400 trip plans done each month (10-15 site assessments each month) and 4,300 in 2011. Site assessments and desk-top tools are utilized.	Began in 2005, once conditional eligibility process was established. Threshold for trip-by-trip is three trips. In 2008, Accessible Services performed 1,371 desktop reviews and by 2011, they performed 2,527. During this time, the field review rate decreased from 39% to 24%.	RTA developed Path of Travel/Trip Screening approach. Pace hasn't implemented it yet. Will revisit in 2014 when Pace consolidates into one call center.

	WMATA	UTA	Pierce Transit	King County	RTA/PACE
Feeder	No	Yes. UTA uses feeder service routinely to fill gaps and to create a consistent approach.	Yes. Requires accessible transfer points, such as transit centers and park & rides.	No.	No. They have discussed this option, but need to work out the related fare policies.
Trips Averted	Demand for paratransit trips has decreased by 12% over the last two years due to implementing conditional eligibility, travel training, and a stronger eligibility process.	29,550 trips (2011)	4,307	12,517 (2011)	N/A
Safety Programs		Police force Security cameras	Security force Undercover, off-duty police		Pace offers orientation to schools for children with disabilities. CTA conducts a public marketing campaign.
Other Strategies	Travel training Free Ride Program (2004) Reduced fare for those found ineligible for paratransit Outreach	Travel training (2011) Free rides on fixed route for paratransit eligible Sensitivity training for fixed-route drivers Outreach to senior centers	Travel training Travel Ambassador program Outreach to human service organizations Reduced fare program	Travel training Community outreach Transit Resource Center Reduced fare program	Travel training
Cost Savings		$971,000 (2011)	$185,201 savings if the trip plans are implemented just once $2.2 Million savings if the plans are implemented once monthly for a year	Between $150,000-$450,000.	N/A

	WMATA	UTA	Pierce Transit	King County	RTA/PACE
Staffing	Eligibility and training staff: Access Services conducts 300 assessments each week. Eligibility staff include: Nine specialists and three contracted specialists who interview applicants. Four travel trainers; six community travel trainers (contract		Approximately 3.5 hours each day is enough to cover trip planning and site review. They do about 10-15 site reviews each month. About .4 FTE used for trip planning in 2011.(doesn't include eligibility process)	Includes a full-time Mobility Planner who communicates conditional eligibility enforcement with customers, three full-time Mobility Specialists who evaluate and document ridership and pathways, and 30% of the Certification Program Administrator's time.	Eligibility only: 21 in-house staff work on the eligibility process; of these six review the applications about decisions about certification 15 outsourced positions do physical assessments (at five locations throughout the region)