

December 22, 1976  
GM Memo No. 77-76

TO: PROJECT DEVELOPMENT COMMITTEE

FROM: General Manager

SUBJECT: Proposed AC Transit Planning Program - Transportation Services for the Elderly and Handicapped

Metropolitan Transportation Commission's (MTC) Resolution No. 299 adopted January 29, 1976, and UMTA regulations which were published April 30, 1976, have mandated specific responsibilities of transit operators to plan, analyze and develop cost effective solutions in meeting the transit needs of the elderly and handicapped.

The attached draft work program addresses in detail the Legislative requirements and presents a proposed planning program to meet these requirements. A critical part of this program is the necessity of involving the elderly and handicapped in the planning process. This would be accomplished by establishing an elderly and handicapped advisory committee.

The work program would be accomplished through a coordinated effort between AC Transit and MTC. The District would enter into a memo of understanding with MTC to formally establish the administrative procedure for the project. A consultant would be utilized to analyze the needs of the elderly and handicapped and provide a cost/benefit analysis to assist the District in the evaluation of alternatives.

Estimated cost of the project is \$81,400 which would be funded by MTC pending their final approval of the proposed work program. It is anticipated that the project would take twelve months to complete.

RECOMMENDATION:

That the General Manager be authorized to request proposals from consulting firms for the analysis of needs of the elderly and handicapped and a cost/benefit analysis to assist the District in the evaluation of alternatives subject to funding approval by MTC.

This matter will be reviewed at the Project Development Committee meeting to be held at 4:00 p.m., Tuesday, December 28, 1976.

Alan L. Bingham

Attachment  
cc: Board of Directors

DRAFT  
DECEMBER 1976

AC TRANSIT  
PLANNING PROGRAM TRANSPORTATION SERVICES  
FOR  
ELDERLY AND HANDICAPPED PEOPLE

## LEGISLATIVE BACKGROUND

All levels of government which are concerned with public transportation - Federal, State, regional and local - have set forth goals, policies, objectives, declarations and legislation pertaining to the transportation needs of Elderly and Handicapped Groups. The intent of this section is to point out and describe the more important documents and to synthesize them for the purposes of the Proposed Planning Program.

At the regional level, the Metropolitan Transportation Commission approved Resolution No. 299 on January 29, 1976. From the Federal level, the Administrator of the Urban Mass Transportation Administration announced final regulations on Transportation for Elderly and Handicapped Persons as printed in the Federal Register dated April 30, 1976, with certain provisions finalized October 18, 1976.

### MTC Resolution No. 299

This document resolves three major directives regarding the planning, development and implementation of programs which make transportation services reasonably accessible to handicapped persons:

1. "...operators...shall be responsible for the development and implementation of programs, in coordination and cooperation with the MTC, appropriate private and non-profit agencies, and para-transit operators..."
2. "...the Overall Work Program for fiscal year 1976-77 will include, and give priority to, essential technical planning studies to support the development and implementation of programs..."
3. "...commencing July 1, 1977, the MTC shall not endorse or approve a Federal or State transportation grant request or allocate Transportation Development Act monies or other transit-aid funds administered by the MTC...unless the claimant has demonstrated ...reasonable "good faith" progress to provide transportation services to handicapped persons."

## UMTA Regulations

These regulations pertain to the planning programming and implementation of transportation services for elderly and handicapped persons. Specifically, Section 613.204 reads:

"The Urban Mass Transportation Administrator will grant project approvals...only if:

- a) The urban transportation planning process exhibits satisfactory special efforts in planning public mass transportation facilities and services that can be utilized by elderly and handicapped persons; and
- b) The annual element of the transportation improvement program...submitted after September 30, 1976, contains projects or project elements designed to benefit elderly and handicapped persons, specifically including wheelchair users and those with semi-ambulatory capabilities; and
- c) After September 30, 1977, reasonable progress has been demonstrated in implementing previously programmed projects."

Advisory information, which was issued in conjunction with the regulation, offers more detailed guidance regarding special efforts in planning and reasonable progress in implementing projects.

"...Special efforts in planning means genuine good faith progress in planning service for wheelchair users and semi-ambulatory handicapped persons that is reasonable by comparison with the service provided to the general public and that meets a significant fraction of the actual transportation needs of such persons within a reasonable time period. Particular attention should be given to those handicapped persons who are employed or for whom the lack of adequate transportation constitutes the major barrier for employment or job training."

"...Primary consideration should be given to self-identification techniques, i.e., asking the handicapped to identify themselves and report their transportation needs to the planning body."

This guidance logically leads to a citizen advisory component:

"Consumer representation. Section 450.120...requires that the planning process include provisions to ensure involvement of the public. Elderly and handicapped persons, including wheelchair users and semi-ambulatory persons, are a part of the public and should be appropriately involved in the planning process to meet the special efforts requirement."

"...In many communities, persons who use wheelchairs or who otherwise have considerable difficulty negotiating steps find public transportation impossible to use for physical reasons, and private transportation-for-hire prohibitively expensive. Specific planning for this group is central to meeting the special efforts requirement."

One final point concerning special efforts in planning deals with potential resources:

"Considerable short term benefit can be derived from the coordination and rationalization of existing resources and services to meet the needs of the elderly and handicapped... Governmental health and welfare agencies and private, non-profit organizations spend substantial sums each year to provide or purchase transportation for their clients, and these resources as well as any reduced fare local taxi service should be considered for inclusion in a local coordinated plan.

Reasonable progress in implementing projects is not defined in this advisory information. Rather, UMTA has chosen to list examples which are "illustrative of a level of effort that will be deemed to satisfy this requirement with respect to wheelchair users and semi-ambulatory persons:

"1. A program for wheelchair users and semi-ambulatory persons that will involve the expenditure of an average annual dollar amount equivalent to a minimum of five percent of the Section 5 apportionment to the urbanized area.

These "five percent funds" may be derived from sources other than Section 5..."

"2. Purchase of only wheelchair-accessible new fixed route equipment until one-half of the fleet is accessible, or, in the alternative, provision of a substitute service that would provide comparable coverage and service levels.

"3. A system, of any design, that would assure that every wheelchair user or semi-ambulatory person in the urbanized area would have public transportation available if requested for 10 round trips per week at fares comparable to those which are charged on standard transit buses for trips of similar length, within the service area of the public transportation authority."

Further governmental policies are as follows:

#### MTC Declaration of Intent

"The Commission expresses its special concern for the mobility needs of the socially and economically disadvantaged, the handicapped, the young and the elderly, and intends that the needs of these groups be given high priority in the development and implementation of the (Regional Transportation) Plan."

Specific policies and objectives which reflect this concern are Objective I and Policies 1.8, 4.1, 4.4, 4.5 and 4.7.

#### Transportation Development Act (TDA), Legislative Findings and Declarations Section 99220(a)

"...Public transportation systems provide an essential public service which must be available at a charge to the user which will encourage maximum utilization of the efficiencies of the service for the benefit of the total transportation system of the state, and, which will not deprive the elderly, the handicapped, the youth, and the citizens of limited means of the ability to freely utilize the service."

#### Urban Mass Transportation Act of 1964, Section 16(a)

"It is hereby declared to be the national policy that elderly and handicapped persons have the same right as other persons to utilize mass transportation facilities and services; that

special efforts shall be made in the planning and design...; and that all Federal programs ... should contain provisions implementing this policy."

### Summary

The planning program has been developed to address the needs of Elderly and Handicapped persons in the AC Transit service area and at the same time to be responsive to the requirements of MTC's Resolution No. 299 and UMTA's final regulations. It is designed so the resulting E & H persons plan will satisfy these programming and implementation requirements.

## AN ANALYSIS OF THE NEED

### Definitions

From the point of view of the elderly and handicapped population, the need for transportation services is particularly crucial, for without mobility, the quality of life is dramatically reduced. Preventative health care, for example, will not maintain the health of an individual who cannot get to the doctor's office or clinic. Low priced food does not feed the family which has no access to reasonably-priced grocery stores. Education and training centers offer no services to those who cannot reach them. And recreational facilities or gatherings of social peers will not raise the spirits of those who cannot stray as far as a block from their homes.

The role of public transit operator can be vital in the provision of services for such persons if proper consideration is made of their special needs.

As defined by the Urban Mass Transportation Administration,

"Elderly and handicapped persons means those individuals who, by reason of illness, injury, age, congenital malfunction, or other permanent or temporary incapacity or disability, including those who are non-ambulatory wheelchair-bound and those with semi-ambulatory capabilities, are unable without special facilities or special planning or design to utilize mass transportation facilities and services as effectively as persons who are not so affected."

#### 1. Handicapped

people

For the purposes of this study, handicapped/may be more clearly defined by the eligibility criteria used for the Bay Region Transit Card. In general, based upon the above UMTA definition:

A mass transportation handicap is any incapacity or disability which results in the inability of a person to perform one or more of

the following functions necessary for the effective use of mass transportation facilities without significant difficulty:

1. Negotiating a flight of stairs, escalator or ramp
2. Standing while waiting for a public transit vehicle
3. Boarding or alighting from a public transit vehicle
4. Standing in a moving public transit vehicle
5. Reading informational signs (sight disabilities) as defined in Section 9 only)
6. Hearing announcements by train conductors, bus drivers or station agents
7. Walking more than 200 feet

The distinguishing characteristics of the Handicapped Group is system accessibility plus specialized service and/or equipment.

## 2. Elderly

(\*)

For the purpose of this planning program, any person 65 years or older is considered in this group. As with the handicapped, elderly people may experience difficulty in accessing the transit system. However, this would be expressed in terms of distance from bus stops or the need for benches, for example, rather than a need for specialized equipment.

As with the low income population, the elderly are considered to be significantly more transit dependent than the population in general because of lower rates of auto ownership and availability. This fact merely underscores the urgency of analyzing and planning for the special needs of both groups.

(\*) The age at which a person becomes eligible for the AC Transit Discount Fare program.

Improvements might be made in the existing transit network by a careful evaluation of actual origins, desired destinations and traveling hours of elderly travelers in comparison with the existing transit network and schedule. In addition, many different types of specialized services may be considered to be appropriate means for improving the effectiveness of transit for the elderly.

WORK PROGRAM OUTLINE AND DESCRIPTION

I. Objective and Scope

A. Objective: To identify the unmet transportation needs of the Elderly and Handicapped ( E & H) persons and to develop alternative solutions for implementation.

B. Scope

1. The program will study E & H persons transportation problems and will focus on ways to make transit service more accessible.

2. The work program will study the AC Transit service area and will coordinate with BART and other organizations now providing transit services in the same service area.

II. Organization

A. The appropriate and necessary agreements will be made between AC Transit and the Metropolitan Transportation Commission (MTC) in order to administer the project.

B. The project will have a Board of Control. Its members will consist of the appropriate AC Transit and MTC representatives.

1. Membership. The Board of Control will be composed of the voting persons, represented by:

ACT (2)

MTC (1)

C. Function of the Board of Control

- 1) To contract for professional-consulting assistance, as needed, in the collection and analysis of data.
- 2) To provide staff assistance for portions of the technical work.
- 3) To conduct open meetings on a regular basis, and to provide a forum in which the Elderly and Handicapped Advisory Committee (EHAC) (see 2-D below) can present its assessment of needs.
- 4) To establish an informal E & H Technical Support Committee made up of persons who now provide or plan for transportation services for elderly and handicapped people. This committee will provide technical input in the evaluation of alternatives.
- 5) To present the substantive issues to the EHAC for their assistance and advice.
- 6) To provide quarterly reports of the on-going process and to prepare a final report.
- 7) The Board of Control may expand or limit the scope of this program.

D. Citizen Participation. The Board of Control will invite all interested parties in the AC Transit service area to organize an E & H Advisory Committee in order to insure participation and advice from the affected citizens.

1. From the group of interested parties an E & H Advisory Committee will be formed that will be made up of persons representing all handicapped groups and the elderly. The Advisory Committee should not exceed nine (9) in number.

2. The EHAC shall represent the concerns of all persons in the AC Transit service area who are interested in transportation problems of E & H people.
3. Clerical and other assistance, as necessary, will be provided to the EHAC.
4. The EHAC shall be responsible for presenting its assessment of the transportation needs of E & H people to the Board of Control.
5. The EHAC shall respond to issues presented by the  
B of C.

### III. Analysis of need

A. A compilation of existing AC Transit and social service agency transportation services in the AC Transit service area.

1. Inventory of AC Transit service and an aggregation of rides; E & H persons rides as a percentage of AC Transit rides.

- a. The AC Transit inventory will use discount fare data to generate an approximation of E & H people rides.

As an element of the on-going 5-year planning program, a Passenger Profile Analysis (PPA) will be conducted in order to provide a more detailed assessment of the E & H people program. The PPA will be done at a later time and then will be included in the E & H planning program.

2. A listing and compilation of Social Service Agencies (SSA) and their rides; E & H people as a percentage of SSA.

1. A survey of SSA's based on recently completed MTC SSA Bay Region Inventory.

- B. An evaluation of additional demand for transportation services by E & H people and an identification of their unmet needs.
  - 1. Definition and categorization of potential users.
    - a) A survey will be conducted in the AC Transit service area in order to more specifically delineate the various kinds and numbers of users.
  - 2. An evaluation of the number and kind of potential trips - a listing by type of trip and E & H person sub-grouping.
- C. Evaluation of the capacity and level of accessibility of the existing systems.
  - 1. A vehicle utilization survey to assess the level of use of AC Transit and SSA vehicles in the AC Transit service area.
  - 2. An evaluation will be made of the existing AC Transit fleet to determine if additional E & H accommodating features of a low capital nature are appropriate.
- D. Prioritization of Needs (EHAC)
  - 1. Review and list needs.
  - 2. Develop criteria to prioritize needs.
  - 3. Prioritize needs based on criteria.
  - 4. Develop a methodology and criteria to evaluate a program that will meet the prioritized needs. Included will be a review of existing evaluation procedures.

#### IV. Develop list of Alternatives

- A. Explore existing local services that can meet the identified needs.
  - 1. SSA, paratransit, and public operator alternatives.
- B. Study additional operating alternatives.
  - 1. Explore other public transit E & H people's programs.
- C. Do a benefit cost analysis of the alternatives.
  - 1. Develop criteria utilizing operator's experience

in other areas and the existing services in Alameda and Contra Costa Counties.

a) Develop a matrix of service alternatives and the benefit/cost factors.

V. Evaluate alternatives and develop implementation program.

A. Evaluate the service alternatives based on prioritized needs and benefit/cost analysis.

1. Select the best alternatives.

a) Select the best alternatives in relation to cost/benefit funding capabilities and implementation.

2. EHAC and B of C to prepare and document the recommended alternatives and proposed implementation plans.

B. Submit recommendation to General Manager for presentation to AC Transit Board of Directors for approval.

VI. Implementation Programming

A. Final planning program design. Develop countdown procedure.

B. Implement plan based on programming design.

VII. Evaluation of operating program.

A. Generate an on-going monitoring and re-evaluation process.

VIII. Finish the planning phase of the program

A. Prepare the final report.

B. Change EHAC to a counseling group.

WORK PROGRAM SCHEDULE

1977

Program Task	Jan.	Feb.	March	April.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
I. Project Administration	[Shaded bar]											
II. Citizen Participation E & H Advisory Committee	[Shaded bar]											
III. Analysis of Needs												
A. Existing Services Compilation		[Shaded bar]										
B. Evaluation of Additional Demand		[Shaded bar]										
C. Evaluation of Existing System Capacity (Coordination Possibilities)		[Shaded bar]				(*)						
D. Prioritization of Needs			[Shaded bar]									
IV. Develop Alternatives												
A. Explore Local Services/Alternatives			[Shaded bar]									
B. Additional Alternatives	[Shaded bar]											
C. Benefit/Cost Analysis						[Shaded bar]	(*)					
V. Evaluate Alternatives Based on Priortized Needs												
A. Identified Needs/Service Alternatives and Implementation Plans					[Shaded bar]				*			
B. Submit Recommended Alternatives									[Shaded bar]			
VI. Implementation Programming												
A. Final Design Countdown Procedure										[Shaded bar]		
B. Implement Plan										[Shaded bar]		
VII. Evaluation Program												
A. Monitoring & Re-evaluation Process											[Shaded bar]	
VIII. Finish Planning Phase of Program												
A. Prepare Final Report												[Shaded bar]
B. Change EHAC to Counseling Group												[Shaded bar]

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Legend  
 \* Report  
 (\*) Consultant Report

ELDERLY AND HANDICAPPED PLANNING PROGRAM

Proposed Budget

WORK ITEMS	AC		
ADMINISTRATION	<u>TRANSIT</u>	<u>MTC</u>	
Staff			
Clerical	3,000		
Planner	4,000		
TOTAL			7,000
ANALYSIS OF NEED (Vehicle Utilization Survey and Analysis of Demand)			
Consultant	40,000		
Staff Planner	4,000	500	
TOTAL			44,500
DEVELOP ALTERNATIVES (Benefit/Cost Analysis)			
Staff Planner	3,000	1,200	
Consultant	5,000		
TOTAL			9,200
DEVELOP IMPLEMENTATION PROGRAM			
Staff Planner	3,000	300	
TOTAL			3,300
EVALUATION OF OPERATIONS PROGRAM			
Staff Planner	4,000		
TOTAL			4,000
OTHER ALLOCATIONS			
Paper and Printing	1,500		
Meeting Space	500		
Advisory Committee Representation	4,000		
TOTAL	<u>          </u>	<u>          </u>	<u>6,000</u>
Sub Total	72,000	2,000	74,000
Contingency (10%)			<u>7,400</u>
GRAND TOTAL			<u><u>81,400</u></u>
FUNDING SOURCES			
Special Allocation MTC Resolution #299			79,400
MTC Staff			<u>2,000</u>
			<u><u>81,400</u></u>