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METRO MOBILITY STANDING ORDERS

Report to the Legislature

Minnesota State Planning Agency

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Introduction

Metro Mobility is the Twin Cities metro area public transit service for persons with disabilities. Over the past few years, Metro Mobility has provided an increasing number of trips for persons requiring regularly scheduled special transportation to and from social service agencies

Issues have emerged concerning how the transportation should be provided and who should be financially responsible for the travel.

Legislators have expressed concern because of rapidly escalating Metro Mobility costs, and also because they want to understand for what purposes funding formerly used for travel to social service agencies is now being used, and if it is possible to recapture these funds to defray Metro Mobility costs.

Some eligible Metro Mobility riders report that they are unable to get rides. They perceive that standing order transportation to social service agencies reduces the trip-making potential for the occasional or demand rider.

The Regional Transit Board estimates that Metro Mobility ridership will increase 5% annually over the next five years. Additional standing order requests can be expected as part the increased demand. If no action is taken, cost and capacity issues can be expected to worsen.

Legislative Assignment

This report has been prepared in response to MN Session Laws, 1989, Chapter 269, Section 35, requiring the State Planning Agency to report on providing special transportation services to persons using standing orders to travel to and from social service agencies that generate a large number of such trip requests. As directed, the report makes recommendations relative to the following:

- o a method for providing the services and an estimate of costs;
- o appropriate responsibility for planning, arranging, providing, and financing the services;
- o sources of funding available and a method of providing funds required to subsidize the services;
- o a coordinated program to train persons to use regular route transit.
- o related issues.

Background

Since 1986, when Metro Mobility was restructured, ridership has grown from 45,000 to 115,000 trips a month. The restructuring involved service decentralization and substantial service area expansion, both of which contributed to growth in trip-making opportunities for eligible participants.

A large proportion of Metro Mobility trips are made in conjunction with social service agency activities. On an average weekday, trips to and from day training and habilitation centers and extended employment facilities may account for 40% of total daily trips and 80% of the trips made during peak periods.

A majority of these trips are guaranteed standing orders. Since 1986, the percentage of standing orders to individual demand trips has increased substantially. See Figure 1.

Day training and habilitation centers are required by administrative rule to arrange transportation to and from their training facilities. With the increased availability of Metro Mobility, some agencies which previously contracted with private transportation carriers or used their own vehicles to transport clients, have encouraged their clients to use Metro Mobility.

Extended employment services may in some cases arrange for client transportation; however, transportation is not a required component of their programming. Persons traveling to these services typically arrange and pay for their own transportation.

Metro Mobility, like other public transit systems, requires a subsidy. In 1988, fares made up approximately 12% of the total trip cost. When an agency pays for transportation for clients on Metro Mobility, it pays only the fare, not the full cost of the trip.

The Metro Mobility subsidy is funded entirely by the state. In 1986, the subsidy was \$5.2 million; in 1989, it is expected to exceed \$11 million. While the total subsidy has increased, the per trip subsidy has declined from \$8.22 in 1986 to \$8.01 in 1989. The average subsidy for group trips is \$6.70.

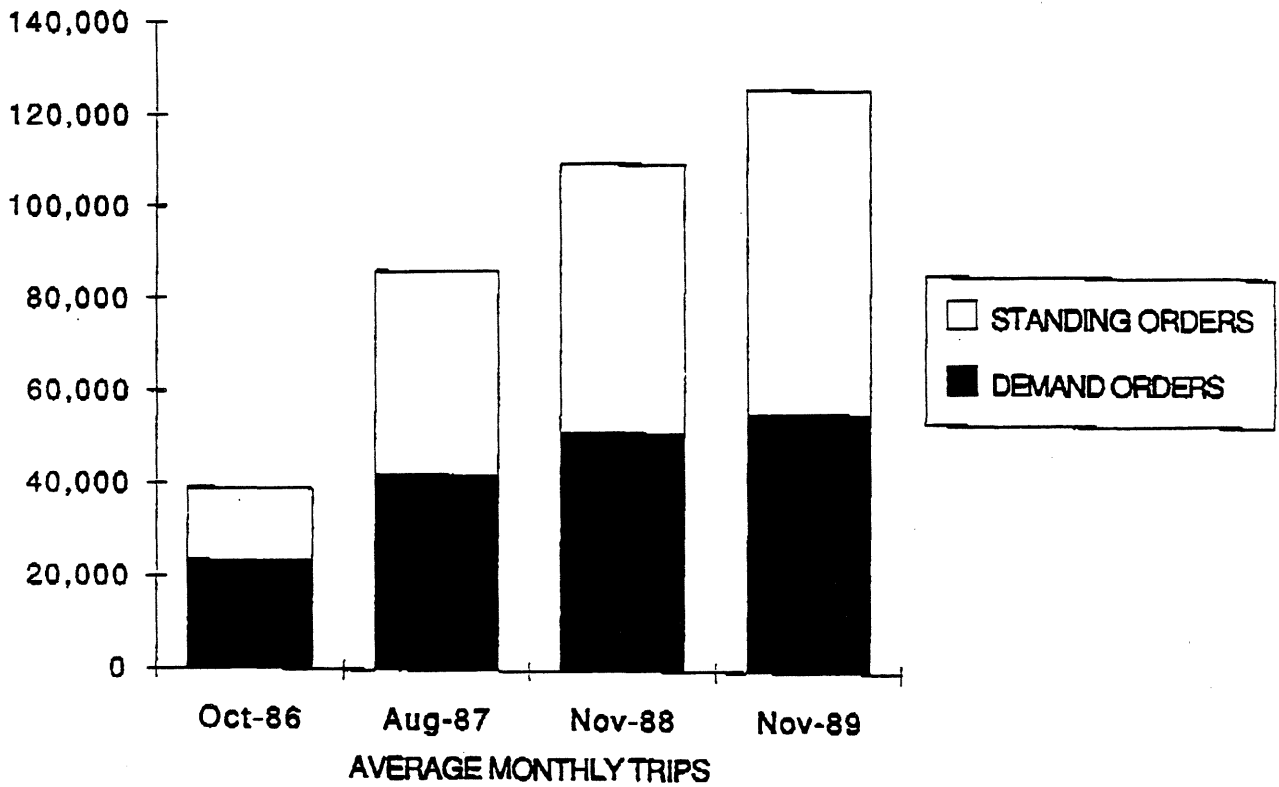
Transportation for some agency clients is eligible for partial reimbursement from the federal government. Those funds, estimated at \$1.2 million annually, are not fully available to Metro Mobility under the current arrangement.

Legislative History

Legislative direction specifically related to trips generated by social service agencies can be found in the following:

- 1979 - Ex. Session Ch. 1, Sec. 27-29
 - sets up special transportation service (Metro Mobility).
 - includes coordination with social service agencies and encourages agency participation in full cost of service.

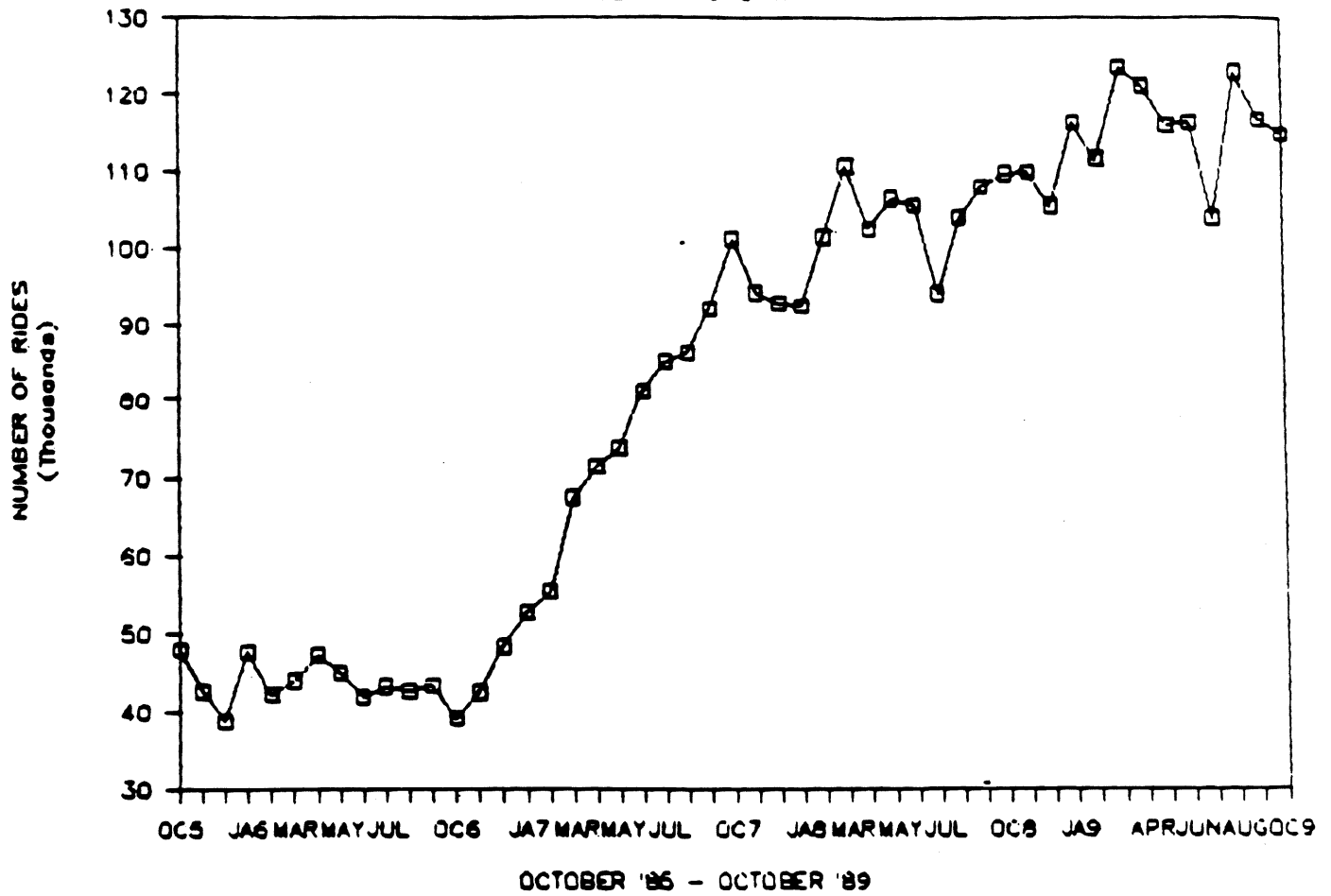
Figure 1
METRO MOBILITY COMPOSITION



Note: In 1989, approximately 61% of standing order trips, on an average weekday, are to and from day training and habilitation centers.

Source: Regional Transit Board

Figure 2
METRO MOBILITY
 RIDERSHIP GROWTH



 Source: Metro Mobility Administrative Center

- 1984 - Ch. 654, Art. 3, Sec. 122
- transfers responsibility for special service (Metro Mobility) to the RTB.
 - maintains provision regarding social service agencies.
- 1988 - Ch. 684, Art.2
- authorizes RTB to set policies requiring financial participation from organizations that benefit from Metro Mobility service.
- 1989 - Ch. 269, Sec. 35 & 48
- State Planning Agency report.
 - relieves the RTB from funding service for persons traveling to DAC programs where transportation costs are required and funded.

A more extensive listing of special transportation and Metro Mobility legislation may be found in the Appendix.

Recommendations

The following recommendations are made in the areas of service design, funding, planning, and travel training. The recommendations are interdependent and will be most effective when considered as a total package.

Method of Providing Service

- o The Regional Transit Board should re-design the group trip element of Metro Mobility service to be consistent with standards for social service transportation while maximizing the cost saving potential of volume service delivery.

Responsibility for Planning, Arranging, Providing and Funding

- o The Regional Transit Board, the Department of Human Services and the Department of Jobs and Training should develop an annual interagency agreement to facilitate coordinated planning for future social service transportation needs.
- o Metro Mobility should continue to provide standing order service to persons traveling to and from social service programs.
- o Agencies providing programs where transportation is a required and funded component should reimburse the Regional Transit Board for the full cost of the transportation from the client's residence to the agency facility and home again when the client uses Metro Mobility for that travel.

Sources of Funding

- o The Department of Human Services should take the lead in proposing changes in statutes and/or rules that will permit the maximum use of federal funds for reimbursement of the full cost of travel to and from social service programs for which transportation is a required and funded component.

Travel Training

- o The Department of Jobs and Training should be designated as the lead agency to coordinate existing travel training programs, and to expand upon those services to assure that persons who can learn travel skills have access to that service.

Related Issues

- o The Regional Transit Board should review Metro Mobility provider reimbursement to determine if individual demand trip rates are appropriately priced.

Metro Mobility Operation

Eligibility

Metro Mobility is an advance reservation, door-through door transportation service for persons who, because of a disability, are unable to use regular route bus service.

To use Metro Mobility, a person must first be certified by a medical professional as having a disability which prevents the use of regular route public transit for all the persons' travel needs. People with functional physical or mental limitations, for example, unable to walk to a bus stop or board a vehicle, may qualify to use the service. For purposes of determining eligibility, the Regional Transit Board has developed a set of six criteria, at least one of which must be met for certification. Currently, there are more than 16,000 certified riders in the metropolitan area.

The System

The Regional Transit Board (RTB) is the agency responsible for planning and oversight of public transit in the Twin Cities metropolitan area. The RTB holds contracts with fourteen vendors, including lift van and taxi companies, to deliver Metro Mobility trips. These vendors are assigned to provide service in specified parts of the 92-community service area. Administrative functions, such as rider certification and data collection, are the responsibility of the Metro Mobility Administrative Center (MMAC) which is operated by the Metropolitan Transit Commission (MTC), also under contract to the Regional Transit Board.

When a rider wants to request a trip using Metro Mobility, a call is made directly to one of the transit providers in his or her community. Most areas, except for sparsely populated communities, are served by three or more vendors, and the rider may choose among them.

Provider Reimbursement

Providers are reimbursed on a per trip basis. The subsidy is based upon the type of vehicle used, the area served, the passenger certification code, and the number of passengers transported to a single destination. A group or "volume" rate has been developed for reimbursement of most standing orders oriented to social service agencies.

Fares

The standard fare for Metro Mobility is \$1.00 per one-way trip, which entitles the rider to a trip of up to eight miles. After eight miles, the rider may have to pay an additional charge directly to the driver. Extra mileage charges vary with providers, but the total fare cannot exceed \$3.75.

Service

Metro Mobility offers two basic types of service: (1) rides provided on a demand-responsive basis, and (2) rides provided on a standing order or subscription basis. Demand-responsive requests for service must be made with the transit provider between 6:00 a.m. and 2:30 p.m., the day before the service is required. These trips are arranged and provided as capacity permits.

Standing Orders

If a rider travels between the same address and the same destination three or more days per week, he or she may request a standing order for Metro Mobility service. Standing orders must meet the criteria of same individual from same location to same destination on the same days, on a regular basis. There is a \$10 fee to place the standing order. Individuals with standing orders have guaranteed service. Their trips are accommodated on a regular basis, and they need not call the day before to request a ride.

Standing orders are a convenience not only for the rider, but for the transit provider as well. Standing orders can be prearranged into tours, similar to subscription routes, requiring less employee time and other resources than demand-response requests. Metro Mobility providers have clearly shown a preference for providing these trips, a large proportion of which are for ambulatory persons. In most cases, standing orders are the core around which the demand trips are scheduled.

Passengers

Although Metro Mobility incorporated the concept of standing orders from inception of the service, during the last two to three years the number of standing orders has grown dramatically, creating a strain on the system. A review of the holders of standing orders shows that they are overwhelmingly persons who use Metro Mobility to access the services of agencies providing day training and habilitation services and extended employment services. The largest segment of this group is traveling to and from day training and habilitation centers.

Agency Use of Metro Mobility

Day Training Clients

Day training and habilitation centers are facilities that provide training, supervision, habilitation, and/or developmental guidance to people with developmental disabilities. More than half of the over 5,000 adults who receive services from these agencies, statewide, have a severe or profound level of mental retardation and/or other secondary disabilities including epilepsy, sensory deficits, physical disabilities, mental illness or challenging behaviors. The supervisory needs of most persons are also very high, as evidenced by the fact that more than half of all clients of day training and habilitation centers live in Intermediate Care Facilities for the Mentally Retarded (ICFs/MR), which are required to provide 24-hour supervision and active treatment.

Day Training Agencies

Agencies involved in providing day training and habilitation services are under the direction of the counties in which they operate, and vary in size, location, and clientele. Services are authorized on an individual client basis by the county case manager. Training and supervision are provided by the agency staff and residential caregivers in accordance with the client's goals and objectives and resources of the providers. Each person receiving services should receive an assessment of their skills including their mobility and community living skills. These assessments, coupled with the desired service plan and location of community service sites, determine the kind and amount of transportation service needed.

Transportation

Day training and habilitation service agencies are responsible for arranging and providing transportation from residence to service site and home again, as well as during client programming hours. Transportation is usually needed for community integration activities and community vocational and prevocational activities. Trips may be provided by an independent transportation carrier under contract to the agency,

public transportation (Metro Mobility or regular route bus), walking, staff vehicles, and/or agency vehicles. Typically, a day services agency will utilize several transportation carriers in combination with public transportation, agency vehicles and special arrangements made under contract to and at the expense of the day services vendor.

As Metro Mobility availability has increased, day service agencies have relied to a greater and greater extent on its services for transporting their clients. Agencies may assist in the preparation of Metro Mobility applications, submit them for certification, and pay the certification fees. The agency, rather than the individual rider, often arranges the standing order with the Metro Mobility provider. The transportation provider may be the same private carrier who provided contract service to the agency before Metro Mobility was available. The difference in the arrangement is that the agency now pays only the client fare for the trip, rather than its full cost. The Regional Transit Board provides the subsidy, approximately ninety percent of the total trip cost.

Metro Mobility Costs

RTB Responsibility

Except for certification fees, standing order fees, and fares, Metro Mobility is supported exclusively by an appropriation from the state legislature. The Regional Transit Board seeks funding for the program as part of its operating budget request, and receives funds, identified for Metro Mobility use, as an element of the total RTB biennial appropriation. Over the years, especially since 1986, Metro Mobility has experienced steady ridership growth requiring increased amounts of funding at the state level. See Figure 3.

Legislative Appropriations

For the 1986/1987 biennium, Metro Mobility received an appropriation of \$11 million; the appropriation was increased to \$12.5 for 1988/1989. Even the substantial increase was determined to be insufficient to meet expanding service needs, and the Regional Transit Board returned to the Legislature with a supplemental funding request of \$7.2 million in 1988. An additional appropriation of \$4 million was granted on the condition that the RTB seek financial participation from organizations benefiting from Metro Mobility service.

Current Funding

In 1989, the Regional Transit Board assessed current ridership, estimated potential demand, and submitted a Metro Mobility request to the Legislature for \$28 million for the biennium. Again, legislators expressed serious concern about the dramatic

Figure 3

APPROVED PAYMENT RATES*

	Transportation Per Diem Rates					Total Program Per Diem Rates				
	1984	1985	1986	1987	1988	1984	1985	1986	1987	1988
Opportunity Workshop	3.98	4.19	4.35	4.35	2.62	13.60	14.31	14.85	15.35	20.48
North Metro	9.48	9.97	10.35	10.70	11.18	26.50	27.88	28.94	29.92	31.27
Midwest Special Services	7.60	7.42	7.45	7.66	3.69	26.45	26.64	27.90	28.89	32.61
Custom Contracts	1.76	1.85	2.13	2.30	1.71	14.88	15.66	21.37	22.00	29.52
North Suburban	1.89	2.28	2.57	2.00	2.00	18.77	19.45	19.99	21.33	28.42
Midway Training	3.27	3.59	3.73	3.51	2.33	19.74	20.62	21.40	30.07	32.77
Accessibility, Inc.	4.06	4.27	N/A	4.43	4.79	14.38	15.13	N/A	31.76	34.23
Northeast Learning Center	3.27	3.43	3.00	2.00	2.00	18.59	19.57	20.87	22.68	29.93
Kaposia	3.78	3.36	3.06	2.45	2.26	21.40	23.13	24.44	25.98	33.28
School for Social Development	6.33	6.66	6.91	7.14	2.00	32.86	34.57	35.88	37.10	44.23
Merrick	2.93	3.08	3.08	2.00	3.87	20.24	21.29	29.87	22.68	31.73
Dakota, Inc. (Dakota)	5.89	5.89	4.71	4.87	4.76	37.19	37.19	42.10	43.53	45.82
Dakota, Inc. (Henn.)	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Average	4.52	5.22	4.27	4.45	3.60	22.95	22.95	24.80	27.61	32.86

* Total inflationary increases were 16.9 percent from 1984 to 1988. (Inflation Index is applied to total per diem equal to full day rate plus transportation rate.) Total per diems for these agencies increased by 24.7 percent due to multiple requests for (and subsequent grantings of) "variances" to the rate limits in accordance with statute and rules to increase staff to client ratios and change services covered by the full day rate. Decreased transportation rates (expenses) appear to have been used to offset increased program expenses for these agencies.

The allowable CPI inflator for each year is as follows: 1985 - 5.2; 1986 - 3.8; 1987 - 3.4; and 1988 - 4.5

Source: Department of Human Services

growth of program costs, particularly those related to trips associated with social service agencies. Legislation was adopted which relieves the Regional Transit Board of providing funding for those social service oriented rides for which other public funding is available. To date, no action has been taken by the RTB to exclude these trips from coverage by Metro Mobility.

Agency Transportation Funding

Medical Assistance Funds

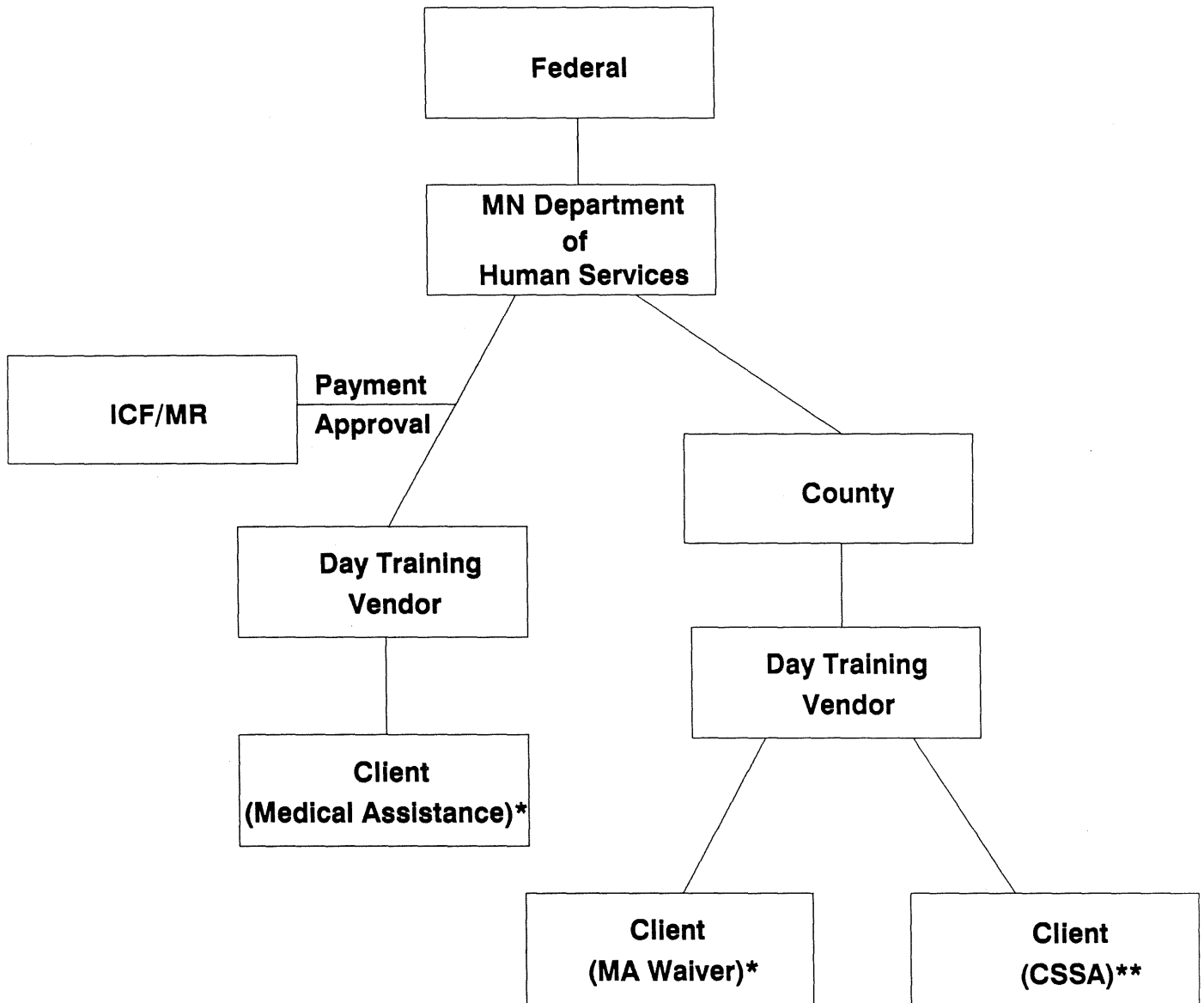
The Department of Human Services administers Medical Assistance (MA) dollars used to fund transportation to and from day training and habilitation centers for approximately 70 percent of the persons in the Twin Cities metropolitan area who receive services from those agencies. Medical Assistance pays for this transportation for MA recipients who live in an Intermediate Care Facility for the Mentally Retarded or Related Conditions (ICF/MR), or who live in the community and are covered by a special Medicaid waiver. Transportation is one component of the day training and habilitation service, which is actually a component of ICF/MR care.

The federal government funds approximately 53% of the cost of day training and habilitation services for MA recipients who live in ICF/MR facilities or who are covered under the waiver. The state pays 42% of the cost of this program, and the counties pay 5%. (The state will assume the county portion of MA costs over the next several years.) Day training and habilitation services vendors bill the Department of Human Services for transportation as part of their overall bill for services. A partial or full day program rate and a rate for transportation is billed for each recipient. See Figure 4.

Transportation Rates

All costs of contracting and arranging for transportation to and from the service site are projected in advance and an individual trip rate is established. When the agency under-spends budgeted transportation revenue, the county may allow the agency to shift those dollars to program areas. Over the years in which Metro Mobility has been a transportation option for the day training centers, transportation per diems have, on average, declined, while program per diems have risen. See Figure 5.

Figure 4
Day Training and Habilitation Funding



***Approximate funding shares are 53% federal, 42% state, and 5% county.**

****Approximate funding shares are 50% county, 25% state, and 25% federal. Additional costs are expected to be 100% county responsibility.**

Figure 5

METRO MOBILITY SUBSIDY AND RIDERSHIP

	<u>1986*</u>	<u>1987**</u>	<u>1988***</u>	<u>1989</u>
Annual Subsidy	\$4,333,977	\$6,900,185	\$9,503,796	\$11,300,000
Number of Riders	527,000	952,945	1,260,099	1,410,279
Subsidy per Trip	\$8.22	\$7.24	\$7.54	\$8.01

* *Metro Mobility program restructured by Regional Transit Board.*

** *Jan. '87 - Service expanded to northern and western suburbs.*

*** *April '88 - Service expanded to eastern and southern suburbs.
Service now provided to all 92 communities in
transit taxing district.*

Source: Regional Transit Board

Other Programs

The Department of Human services also administers other programs that assure that MA recipients have access to medical services. The Medical Assistance rules under which the day training program operates, however, do not allow reimbursement under these programs if transportation expenses are included in the per diem payment to the ICF/MR or if the transportation rate has been established under the rules governing day training and habilitation services. This rule was intended to keep the cost of transportation to and from the center a part of the day training and habilitation services package.

Community Social Services Act Funds

Approximately 30 percent of the participants at day training centers in the Twin Cities metropolitan area are funded through Community Social Services Act (CSSA) funds provided by the counties. The transportation and partial and full day rates are billed directly to the county, and must be identical to those paid for Medicaid eligible recipients. Any increase in MA rates for the program or transportation components of day training services will require a corresponding increase in the rates counties pay for participants funded through CSSA. Medical Assistance cannot be used to fund services for persons who are not MA recipients or whose residential services are not funded by Medical Assistance, as in the case of recipients whose day training services are funded through CSSA. In addition, Medical Assistance cannot be used to fund transportation to non-Medicaid programs such as extended employment services. Transportation to those sites must be funded through other sources even if the recipient has MA coverage for trips to medical visits.

Medical Assistance Funds for Transportation

Medical Assistance funds which are applicable to transportation to and from day training centers are limited. In the Twin Cities metropolitan area many day training service vendors have lowered their transportation per diems by switching clients to Metro Mobility. Because allowable per diems are based on the previous year's approved amount plus inflation, it will take some action on the part of the Department of Human Services, and possibly the Legislature, to restore funds to the transportation budgets of the agencies. This would allow the Department to request additional federal medicaid assistance (the federal share of the additional transportation costs), which has been estimated at approximately \$1.2 million annually. It should be noted that any increase in the cost of transportation for MA recipients will signal the same increase in costs for participants in the CSSA program, and those additional funds would be the responsibility of the counties.

Funding Sources

Federal Participation

To maximize travel opportunities , every effort must be made to ensure continued federal participation in the full cost of transporting persons to services for which transportation is a reimburseable expense.

Over the several years that agencies have increasingly used Metro Mobility for transporting clients, dollars that were once used for transportation have been redirected into program areas. These changes have been precipitated by an influx of clients with more severe disabilities and increased training needs. Agency funding sources at the county and state levels have approved these adjustments to ensure the availability of adequate programs and resources for those persons. To retrieve funds previously used for transportation would clearly involve program cuts.

If additional federal participation in transportation costs is pursued, state and local funds will be necessary to meet matching requirements. This would be the case if Metro Mobility provides the service or if responsibility is returned to the social service agencies. One approach would be to re-direct some Metro Mobility dollars to the Department of Human Services and possibly to the counties.

Funding Breakdown

The RTB and the Department of Human Services have estimated that Metro Mobility provides 475,000 standing order trips annually to day training and habilitation centers. According to data collected by the RTB, 70% of those trips are eligible for reimbursement through medical assistance, with the remainder being funded by CSSA funds. The estimated subsidy for all day training standing orders is \$3,182,500; for the portion eligible for medical assistance, it is \$2,227,750. Of that amount, the federal government would fund approximately \$1,186,500. To match those funds, the Department of Human Services would need to contribute \$937,214 in state funds and the counties \$104,306.

Because charges for clients funded by MA and CSSA must be consistent, the counties would face further expenditures. Roughly fifty percent of CSSA funds are provided by federal and state sources; however, they are block grant in nature and are applied to a broad range of social service activities. Any increases in transportation charges associated with CSSA programs would almost certainly be borne entirely by the counties. In this case, the cost would be \$1,058,786. Using the example above, the breakdown of annual subsidy costs for providing transportation to and from day training centers would be as follows:

	MA	CSSA	Total
Federal	\$1,186,500		\$1,186,500
State	937,214		937,214
County	\$ 104,036	\$954,750	\$1,058,786
Total	\$2,227,750	\$954,750	\$3,182,500

These amounts represent the subsidy or additional costs to the participating entities. Fares, of approximately \$1.00 per trip must be included when calculating the total cost.

Currently, Metro Mobility (100% state funds) provides the entire subsidy. Under this scenario, the federal government would contribute \$1,186,500 or approximately 37% of the cost of these trips.

According to the RTB survey of day training agencies, the largest number of standing order trips from residence to facility and back, is provided in Ramsey County (48%), followed closely by Hennepin County (46%). Five percent of the trips are provided to Dakota County agencies and less than 1% to Anoka County.

Travel Training

Use of the Mainline Bus

Mobility training to teach individuals to use mainline transit service is increasingly promoted as a means of reducing demand for special services like Metro Mobility. While nearly all public transit is subsidized, special door-to-door services clearly require the most intensive use of public funds on an individual trip basis. The current subsidy for an MTC bus ride is \$1.00, for example, while the overall average subsidy for Metro Mobility is \$8.00.

Training for persons who have cognitive disabilities, but are otherwise able to use the mainline bus service, can be a partial solution to costly and over-crowded special transportation systems. Potential benefits, however, are not limited to funding and system capacity, but may actually be most significant for the persons who are trained. Ability to use the mainline bus permits more travel flexibility than use of Metro Mobility, and offers the least restrictive alternative in terms of integration into the community.

Persons with visual impairments have traditionally been the recipients of orientation and mobility training. More recently, training of this type has been recognized as valuable for persons with developmental disabilities (and others), and programs of a more generic nature have been developed to meet their needs.

Training Methodology

In general, travel training cannot be accomplished in a group setting, but rather must be provided on a one-to-one basis. Although, training programs vary, most will include instruction in the following: pedestrian skills such as reading signs, identifying landmarks and crossing streets; social skills such as asking questions and getting directions; and safety precautions and procedures for dealing with emergencies.

Additionally, the trainer will accompany the individual on the identified mainline bus route, ideally at the times the person will be traveling, until the person appears able to travel independently. The trainer will covertly observe the person as he/she travels alone for the first few trips. The time necessary to complete the training varies widely, and is dependent upon the cognitive barriers experienced by the individual.

Regional Transit Board Survey

A Regional Transit Board survey of day training agencies and extended employment facilities generated the following information related to MTC travel and training of agency clients:

- o Fifty-two percent of extended employment clients and 17% of day training clients currently use the MTC.
- o Of the 33 day training centers responding to the survey, 27 have programs for training clients to use the mainline bus service. Two of the 8 surveyed extended employment facilities provide training.
- o Eighty-one persons participating in day training programs and 4 at extended employment sites were receiving travel training at the time of the survey.
- o According to agency personnel, approximately 9% of the clients (232 people) from surveyed day training and extended employment sites could be trained to make routine trips alone on the regular bus system.

Training Requirements

The Department of Human Services has required or encouraged travel training in certain social service rules. In Licensure of Training and Habilitation Services for Adults with Mental Retardation or Related Conditions, the rules require that "to the extent possible, a person receiving services shall use or be trained to use public transportation to and from the service site." (Minnesota Rules 9525.1690, Subp.1)

A second reference to training can be found under rules relating to Training and Habilitation Reimbursement Procedures for ICF/MR's. Reimbursable services include "supervision and training in community orientation, including proper use of traffic signals identification of police, firemen, and bus drivers, use of pedestrian pathways and public transportation to and from stores, restaurants, meeting places, and other familiar settings." (Minnesota Rules 9525.1250, Subp. 1A)

Travel training is expected to become more important as the trend toward community based and supported employment continue. Client needs in accessing scattered employment sites will differ significantly from group travel to single facilities. Costs are certain to escalate if these individual demand trips are all made on Metro Mobility. Efforts to ensure that everyone who is capable of being trained has access to that training will be rewarded by reduced need for the special transportation provided by Metro Mobility.

Future Needs

Community-Based Service Emphasis

Since the 1960's there have been increasing demands upon community-based services for persons with disabilities. Minnesota has continued to reduce it's reliance on both state-run and large community-based institutional settings. Recent legislation will result in most persons with developmental disabilities living in the community utilizing community-based services.

Importance of Transportation

Transportation is a key factor in the ability of a person to access community resources and involve him or herself in a lifestyle of choice. Demand for transportation that enables persons with disabilities to move about their communities will continue to increase as long as policies are directed at community-based services. Persons with disabilities who are employed, live in their own homes or apartments, and choose their own forms of leisure and recreation, will increasingly require special transportation service. Because persons with severe handicapping conditions are also being integrated into the community, vendors of goods and services like transportation, will need to be able to serve persons with a wide range of needs.

Service Needs

It is estimated that approximately 40,000 persons with developmental disabilities live in Minnesota. Of that number, approximately 16,000 receive the support of programs administered by the Department of Human Services, and of those, all but 1,400 live in community settings.

In the coming years, it would appear that services to persons with disabilities, including persons with disabilities other than developmental disabilities, will continue to move toward integration into the mainstream of the community. Consumers will more often expect services designed to afford opportunities for normalized lifestyles.

Recommendations

Recommendation #1

The Regional Transit Board should re-design the group trip element of Metro Mobility service to be consistent with standards for social service transportation while maximizing the cost saving potential of volume service delivery.

Discussion

Purpose - The purpose of re-designing the volume trip service would be to provide standing order transportation at a cost which takes into consideration economies associated with volume trip delivery and at the same time is consistent with social service standards. Expected cost savings could be applied to other aspects of Metro Mobility service.

Service - A subscription delivery model would be used to transport persons using standing orders to travel to and from locations generating a large number (100 or more, for example) trips per week. The actual service would be very much like what is provided today by Metro Mobility, except that more attention would be given to service efficiencies and reimbursement procedures would be changed.

Providers currently are reimbursed on a per trip basis, and use their discretion relative to routing and touring of standing order trips. A recent routing and scheduling exercise conducted by the Regional Transit Board suggests that the present service provided to certain facilities could be arranged and provided more effectively.

To promote efficiencies, the Regional Transit Board could contract with the MMAC or another administrator to schedule and route standing order tours, or the RTB could incorporate additional standards for these trips into provider contracts. The Board would have the option of continuing to contract with current Metro Mobility providers or procuring the service through competitive bid.

Passengers - Overall, the new arrangement would be expected to have little effect on the passenger. Arranging travel to and from day training and habilitation services is the responsibility of the vendor of the services. Clients are not typically involved in setting up the standing order with Metro Mobility and so would experience no change relative to arranging this travel. Service would be similar to that currently provided; however, because it would be upgraded to meet state

rules, passengers could experience advantages such as reduced travel time. The redesigned service would be sensitive to integration issues, and would employ delivery methods and vehicles appropriate to community transit use.

Persons using this system would continue to be eligible for Metro Mobility service on an individual trip basis for other daily transportation needs. This would include work trips when and if opportunities were identified in the community.

Agencies - Most agencies have come to rely on transportation professionals, whether private contractors or Metro Mobility, to provide service to their clients. Their preference has been to avoid "getting into the transportation business." A continuing arrangement with Metro Mobility would relieve agencies of duties associated with negotiation and administration of contracts and enforcement of service standards.

According to licensing rules, agencies must ensure that certain conditions are met in transporting clients to and from day training and habilitation services. Travel time, for example is limited to no more than one hour per one way trip. Currently, Metro Mobility permits trip times of up to ninety minutes. The new service design would incorporate adjustments of this type, with overall service improvement expected.

Providers - Metro Mobility providers may have concerns about changes in this service since they perceive standing orders to be the "backbone" of their Metro Mobility work. They maintain that a balance of standing order trips and individual demand trips is necessary to their successful participation in Metro Mobility. Some providers have said that without group trips, it would not be financially feasible for them to provide Metro Mobility service. Rate adjustments which include raising the reimbursement rate for long distance trips may answer some provider concerns.

Costs - The Regional Transit Board is investigating distance based and hourly rates as possible alternative reimbursement mechanisms. Preliminary cost calculations suggest that improved scheduling and revised reimbursement procedures could result in savings of 15% or more over current group trip rates.

The Regional Transit Board would contract directly with the social service agency for the full cost of client trips from residence to facility and back home.

Legislation - None required at this time. The RTB has done preliminary research and has indicated interest in pursuing this approach.

Funds - Cost savings realized as a result of this initiative could be offset by increases in individual demand trip reimbursement. See Recommendation #7.

Timing - Changes should be made as soon as practical, but no later than July 1, 1990.

Recommendation #2

The Regional Transit Board, the Department of Human Services, and the Department of Jobs and Training should develop an annual interagency agreement to facilitate coordinated planning for future social service transportation needs.

Discussion

Planning for the future transportation needs of persons using social service programs will be an important step in assuring that those programs are successful. Federal and state policies continue to move toward integrating persons with disabilities into community settings providing the least restrictive options for daily activities. Access to training will be critical to their attaining independent living and employment goals, and will depend upon effective transportation.

The Regional Transit Board, the Department of Human Services, and the Department of Jobs and Training have only recently begun to discuss transportation and other service issues. Each agency can benefit from involvement in certain planning activities of the others. The Department of Human Services, for example, is responsible for siting and licensing day training facilities. With input into the planning process, the Regional Transit Board will be better able to design transportation to meet the needs of persons traveling to service sites. The Department of Human Services and the Department of Jobs and Training should likewise, participate in decisions concerning transportation service delivery.

Cooperative planning to meet future needs should also include county and social service agency representation. A coordinated approach will help to prevent misunderstandings and ensure that the most efficient use is made of all available resources.

Legislation - Direction to agencies to develop interagency agreement.

Funding - None required.

Timing - Immediately

Recommendation #3

Metro Mobility should continue to provide standing order service to persons traveling to and from social service programs.

Discussion

The RTB is the agency responsible for transit planning and administration in the Twin Cities metropolitan area. Legislative goals for the RTB include providing for a basic level of mobility for all people in the metropolitan area and arranging for a comprehensive set of transit and paratransit services to meet their needs.

Metro Mobility enabling legislation addresses the issue of travel to social service agencies and directs the RTB to "encourage public agencies that provide transportation to eligible individuals as a component of human services and educational programs to coordinate with this service and to allow reimbursement for transportation provided through the service at rates that reflect the public cost of that transportation." (Mn. Stat. 473.386, Subd. 3f) It may be concluded that transportation for clients of social service agencies was anticipated from the beginning of the Metro Mobility program.

Persons who use Metro Mobility to travel to and from agency facilities must first have applied for and been granted individual Metro Mobility certification based on RTB approved eligibility criteria. Effective January 30, 1989, new eligibility criteria included the following: "A mental functional limitation that prevents a person from independently using, or learning to use, an alternative mode of public transit." Those persons should have access to standing order service as other Metro Mobility users do.

Legislation - None required.

Funding - Full funding should be sought for persons traveling to and from social service agency programs where transportation is a required and funded component of the program. See Recommendations #4 and #5.

Timing - On-going.

Recommendation #4

Agencies providing programs where transportation is a required and funded component should reimburse the Regional Transit Board for the full cost of transportation from the client's residence to the agency facility and home again when the client uses Metro Mobility for that travel.

Discussion

Full cost reimbursement for Metro Mobility would apply only to the trips specified above. The Regional Transit Board estimates that Metro Mobility provides approximately 475,000 of these trips annually.

Day training and habilitation programs have clear responsibility under state rules to see that their clients have transportation to and from the training facility. According to administrative rule, Training and Habilitation Reimbursement Procedures of ICF/MR's, an agreement between the day service provider, the ICF/MR and the county must include "the provision of, or arrangement and payment for transportation by the day service provider for its clients to and from the day service provider site." (Minnesota Rules 9525.1240, Subp. 1E)

Legislation passed in 1989 states that the Regional Transit Board "is not required to provide funding for transportation services from a residence to a service site and home again when the services are used by individuals in conjunction with their participation in human service developmental achievement center programs in which transportation to and from the program is a required and funded component of those programs." (Mn. Stat. 473.386, Subd. 4)

It should be recognized that agencies providing day training services act in a "pass through" capacity when securing transportation for their clients. The agencies are typically non-profit organizations providing services to persons dependent upon public funds. It is only appropriate to expect agencies to participate in the full cost of Metro Mobility transportation for their clients if support is provided from funding sources. If adequate funding is not provided and agencies are required to meet additional costs, it will undoubtedly be necessary for them to utilize funds for transportation that would otherwise be used for training programs. This would significantly burden social service vendors who must meet increasing demands associated with clients requiring a broadening range of services.

Counties will be hard-pressed to generate funds necessary to make this transition. Both Hennepin and Ramsey Counties are presently involved in addressing severe budgetary constraints associated with new laws limiting their ability to raise taxes. Social service programs are subject to these budget difficulties. Ramsey County has indicated that increases in transportation costs for agency clients would translate directly to fewer clients served in day training programs.

Legislation - Provision should be made for funds equal to the state share of costs associated with certain agency trips to be transferred from Metro Mobility to the Department of Human Services for that purpose. Transfer should also be considered for affected counties.

Funding - Metro Mobility would retrieve these dollars, along with matching federal funds, in the form of full cost reimbursement.

Timing - As soon as practical, but no later than January 1, 1991.

Recommendation #5

The Department of Human Services should take the lead in proposing changes in statutes and/or rules that will permit the maximum use of federal funds for reimbursement of the full cost of travel to social service programs for which transportation is a required and funded component.

Discussion

Assuring that funds are available to reimburse Metro Mobility for the full cost of the trip will require that a number of factors be addressed. The Department of Human Services, as administrator of the funds, is best positioned to propose or direct any changes or adjustments that may be necessary. At a minimum, the following will need to be considered:

- o Agency per diems, including transportation per diems, are usually increased only on an annual inflationary basis. Legislative authority will likely be necessary to make adjustments in allowable rates to accommodate increased transportation costs.
- o Even if funds are made available for increased costs, some metro area day training providers are near or at the cap (125% of the statewide median rate) for approved program rates.
- o Some agency clients receiving medical assistance reimbursement are on the Title XIX Home and Community Based Waiver. These persons live at home or in arrangements other than ICF/MR's. Their per diems are subject to a state cap.

Legislation - May be required for all of the above. The Department of Human Services has suggested language to permit the Commissioner to approve day training and habilitation rates that exceed statutory limits where vendor transportation costs increase due to RTB action.

Funding - Existing state transportation dollars and matching federal funds are expected to meet costs associated with these changes.

Timing - No later than January 1, 1991. The Department of Human Services will require six months to implement changes required by legislative or RTB action.

Recommendation #6

The Department of Jobs and Training should be designated as the lead agency to coordinate existing travel training programs, and to expand upon those services to assure that persons who can learn travel skills have access to that service.

Discussion

This recommendation is taken almost verbatim from recommendations made in a report by the Metropolitan Center for Independent Living (MCIL), in February, 1989.

The Regional Transit Board contracted with MCIL to conduct an assessment of mobility training in the metropolitan area. The report found that travel training is currently provided in a number of settings including the Minneapolis and St. Paul school systems, organizations serving persons with visual impairments, and social service agencies. MCIL also determined that there are gaps in available training opportunities and that programs are not coordinated to provide continuity of instruction as individual circumstances change. This is particularly evident as high school students transition to employment or other activities in the community. When interaction takes place between entities providing these services, it is only on an informal basis.

While it appears that travel training is generally available to persons who can learn to use mainline transit, some needs may remain unmet because the individual is outside the service delivery stream in which those services or information about them are provided. The Department of Jobs and Training is in a position to act as a coordinating agent, and a source of information and referrals for persons seeking and operating training programs.

The Regional Transit Board should work in close cooperation with the Department of Jobs and Training, as well as other agencies, to encourage greater use of the regular bus system. The Board is currently considering a pilot program to provide free mainline bus passes for persons completing travel training.

Legislation - Direction to the Department to assume this responsibility.

Funding - It is anticipated that the coordinating function could occur within the existing departmental structure. The Department of Jobs and Training currently has funds that may be used for travel training associated with employment. If additional needs are identified, funding requirements could be addressed at that time.

Timing - Immediately.

Recommendation #7

The Regional Transit Board should review Metro Mobility provider reimbursement to determine if individual trip rates are appropriately priced.

Discussion

Approximately 1% of Metro Mobility trip requests are turned down. Some eligible riders believe that they are unable to get rides on Metro Mobility at peak periods, because providers are at capacity providing group trips. Trip denial data collected by the Metro Mobility Administrative Center is not analyzed regularly; however, a study done for the month of April, 1989,

showed that trip denials occurred throughout the day, and were not concentrated at peak periods. Larger Metro Mobility providers confirm this finding; those providing fewer trips indicate that they are at or near capacity at peak periods.

Persons who use Metro Mobility service also report being denied rides which involve longer distances. Data to support or refute this is not routinely compiled, but it is logical to conclude that long distance trips are difficult to schedule into shared-ride tours and are more costly to provide. Morley Bus Company, the largest provider of Metro Mobility trips has done an informal survey which indicates that approximately one-half the trip requests turned down by that company involve distances of eleven miles or more.

Metro Mobility providers are expected to provide a combination of standing orders and demand response trips as part of their agreement with the RTB. Reimbursement rates, however, have made group trips more financially rewarding to providers. Although rates have recently been adjusted, a balance has not been achieved.

Reimbursement for various service types should be as closely related to actual production of work as possible. Financial incentives to add drivers and vehicles or accept long distance trips may alleviate some of the problems associated with individual demand trip denials. Changes in reimbursement for these trips would most appropriately be made in concert with downward adjustments to group travel reimbursement.

Legislation - None required.

Funds - The additional costs related to any required rate adjustments are expected to met by savings on volume trips.

Timing - This analysis should be done in conjunction with the group trip rate review. Action, if required, should be complete by July 1, 1990.

APPENDIX

Community Participation

- o Background issues paper on agency standing orders developed in cooperation with Department of Human Services and Regional Transit Board. (Background paper available upon request.)
- o Paper distributed for review and comment to 175 interested persons, including transit providers, social service providers, and organizations representing the elderly and disabled communities.
- o Five written responses received; and approximately ten responses by phone.
- o Interviews conducted with Department of Jobs and Training, Opportunity Workshop, Metro Work Center, Center for Independent Living, Metro Mobility Administrative Center (MTC), MN Association of Rehabilitation Facilities, Metro Ride, Morley Bus, HealthEast MedKab, Ebenezer Society Metropolitan Council Developmental Disabilities Advisory Committee.
- o Presentations on background paper made to RTB Policy Committee, Metro Mobility Transportation Providers, Social Service Providers, St. Paul Mayor's Advisory Committee on Disabled People.
- o Final draft report with recommendations distributed to 175 interested persons for review and comment.
- o Draft report presented to RTB Transit Accessibility Committee.
- o One written response and 8 phone responses to draft report.

SPECIAL TRANSPORTATION/METRO MOBILITY HISTORY

- 1979 Ex. Session Ch.1, Sec. 27-29
- sets up coordinated special transportation service and establishes operating standards.
- 1981 Ch. 357, Sec. 67
- requires operator assistance in door through door service for project mobility and similar services.
- 1982 Ch. 556, Sec. 1 & 2
- clarifies the application of operating standards; exempts providers and limits standards to recipients of state or federal funds.
- 1984 Ch. 654, Art. 3, Sec. 122
- requires RTB to implement special transportation service coordination tailored to individual needs using public and private providers.
- 1985 Ex session, Ch. 10
- eliminates management policy committee; replaces it with advisory committee.
- 1987 Ch. 88
- sets standards for special transportation services (safety inspections, etc.

- DOT to evaluate providers.

- RTB to coordinate existing providers, contract for day to day administration, establish system for handling complaints and report to legislature, hold hearings on provider standards and eligibility, etc.
- 1989 Ch. 269, Sec. 35 & 48
- State Planning Agency to report to legislature on special transportation services.

- relieves the RTB from funding service for persons traveling to DAC programs where transportation costs are required and funded.
- 1989 Ch.339, Sec. 22
- RTB to study delivery of special transportation services for the elderly, handicapped and disabled and report to legislature.

RIDER LANGUAGE

- 1979 Ex Session Ch. 1, Sec. 4
- requires operator assistance in door through door service for special transportation services. (later coded in Statute - 1981).
- 1983 Ch. 293, Sec. 2
- DOT to evaluate benefits and consequences of competitive bids for special transportation services.
- 1988 Ch. 684, Art. 2
- encourages the RTB to seek financial participation from organizations that benefit from Metro Mobility service.

- requires report summarizing policies and plans, service priorities and standards, cost-sharing options, administration and management, etc.