

Evaluation of Custom Transit Registration Pilot Project: Comox Valley handyDART

1.0 Purpose

The purpose of this report is to provide an update on the Custom Transit Registration Pilot Project and its initial outcomes after the first year of operation, and to seek local endorsement to continue the project.

2.0 Background

Recognizing that an increasing number of transit systems across North America have adopted a more accurate and personalized method of registering custom transit riders, BC Transit, with support from the Comox Valley Regional District, implemented the handyDART Registration Pilot Project on February 14, 2014. The revised process applied to new handyDART registrants and improved on the previous paper form only approach by including an in-person assessment with a mobility coordinator (contracted third-party occupational therapists at CBI Health Group). The main objective of the new process is to better match the applicant's needs with the most appropriate type of transit services available.

The in person assessment takes into account each individual's travel needs in addition to their cognitive and physical abilities with regard to using the accessible conventional transit system¹. Mobility coordinators also inform applicants about the accessible transit options available in their community, assess their ability to travel safely, ensure their mobility aids are appropriate for transport and make recommendations to BC Transit as to the applicants' eligibility categories (unconditional, conditional, temporary, ineligible). If an applicant does not agree with the eligibility outcome, they have the right to appeal the decision.

As the population ages in the Comox Valley area, demand – and costs – for custom transit service will only continue to grow. It is becoming increasingly more essential that handyDART resources are focused on the customers who require this specialized service and that accessible conventional buses are used to their full capabilities.

3. Pilot Project Results

The following analysis addresses how well the new registration process has met the key objectives of this pilot program, which were to:

- Enhance the quality of handyDART eligibility evaluations;
- Slow the growth in ridership and costs of handyDART service delivery, or alternatively ensure that capacity is freed up for those who do not have conventional transit as an option;
- Expand mobility options for people with disabilities by having a dialogue with applicants about their abilities and resources available in the community.

¹ In the Comox Valley Transit System, two types of services are available: "conventional service" refers to trips operating on fixed routes and schedules to bus stops throughout the region while "custom service" (also known as handyDART) provides service on demand to registered users who have a disability that prevents them from using the conventional service some or all of the time. All vehicles in the system are low floor and can accommodate people using wheelchairs and scooters.

4. Enhanced Eligibility Assessments

The Canadian Urban Transit report “Canadian Code of Practice for Determining Eligibility for Specialized Transit” (CUTA, 2013) suggests a number of both qualitative and quantitative measures for determining the effectiveness of eligibility assessments for custom transit. These measures address the pilot program objectives noted above, and include:

- How do various program elements compare to industry standards and contract requirements? In the Comox Valley handyDART context, these could include the proportion of applications that are incomplete (applicant chooses not to continue with application after submitting initial paper application) or result in no-shows; the proportion of mobility assessments versus phone interviews; physical assessments versus other categories; and, the proportion of applicants requesting transportation to assessments
- Are assessments conducted in a respectful manner which results in applicants being aware of the full range of mobility options based on their functional abilities?
- Do eligibility outcomes result in a higher proportion of conditional eligibility determinations?
- Is the quality of the language included in the conditional determinations superior to that resulting from paper applications, and can these determinations be used to apply trip by trip eligibility?
- Has capacity been freed up on the handyDART service to allow for increased trips by existing riders, or a slowing down in ridership growth?

The following sections provide quantitative analysis of each of the above measures based on handyDART usage and project assessment monitoring collected over the past year, as well as historical information and industry averages.

In terms of the qualitative experience, follow-up telephone surveys were conducted in February to March 2015 with a sampling of applicants who had completed the revised registration process. This sampling included applicants who did not receive their preferred eligibility outcome. Every applicant surveyed reported that they felt that the mobility coordinator acted in a respectful manner and, when given the choice of positive, neutral or negative, that the overall experience of applying for handyDART service was positive. Further to these encouraging findings, more than half of those surveyed reported that they learned something about their different transportation options after the in-person assessment.

5. Eligibility Program Characteristics

In order to gauge the effectiveness of the eligibility process for Comox Valley handyDART, we compared some of the 2014/15 outcomes with industry standards and with contractual requirements. Following are some of the key findings:

- Six per cent of the 235 applicants chose not to continue with the application process after submitting their initial paper application (incomplete applications), and an additional 3.5 per cent failed to appear for their in-person assessment. These numbers are very low in terms of industry standards, where it is not uncommon for 20 to 30 per cent of applicants to cancel or “no-show” their assessments.
- 53 per cent of the assessments were based on in-person assessments, with the balance based on telephone interviews, which are considered to be far less effective as an eligibility screening tool. This proportion of in-person assessments is considerably lower than the level indicated as a guide in the CBI contract (ratio of 70/30). A key reason for the lower percentage of in-person assessments is the intent of CBI to accommodate concerns in the social service community from occupational therapists who objected to in-person assessments for their clients. These professionals indicated that they were as well skilled to make eligibility determinations as the

CBI staff. Since a higher proportion of in-person assessments is expected to produce more accurate and detailed eligibility determinations, as reflected in the outcomes of the other pilot project location, increasing the proportion of in-person assessments and continued outreach to the occupational therapy community are objectives that have been addressed and will be heeded in future engagements.

- 24 per cent of applicants were transported on handyDART (free of charge) for their mobility assessments. Due to the additional cost associated with this transportation, a lower percentage is preferred from the provider/agency's standpoint, particularly when combined with a low no-show rate. The proportion in the Comox Valley compares very favorably with industry standards which usually vary between 50 per cent and 80 per cent.

6. Eligibility Outcomes

In-person assessments generally result in a number of changes in eligibility trends when compared with paper-based application models. The key differences are a slowing down in the rate of growth of applications and an increase in the proportion of individuals who are found to be conditionally eligible. Both of these trends were evident in the Comox Valley pilot project.

Changes in Application Volumes: This trend is explained by the fact that individuals who are able to use conventional transit are less likely to participate in an in-person process in which their conventional transit capabilities are going to be more evident than if they are simply required to self-declare their eligibility or possibly obtain a signed document from a healthcare professional. North American trends suggest that the reduction in application volumes when shifting between these two models can be in the order of 10-25 per cent.

Annual application submissions for Comox Valley handyDART declined steadily in the two years prior to the pilot project, from 280 in 2012/13, to 210 in 2013/14. In the year ending February 2015, the number of submitted applications rose slightly to 235. The significant difference being that of those applications, 9.5 per cent chose not to continue with the handyDART application process. Since one of the goals of the pilot is to be able to explain in the intake process the nature of handyDART service and for whom it is intended, applicants choosing to self-select out of handyDART would be a positive sign as this suggests that better informed residents are deciding whether this program is clearly intended to address their mobility needs. When taking into account the fact that a further 7.5 per cent of applicants (16 applicants total) were determined to be able to use the conventional system, and therefore denied eligibility, the number of new registrants decreased during the pilot period to 197, a six per cent decrease from the previous year.

Proportion of Conditional Eligibility Determinations: The ability of eligibility assessors to make conditional eligibility² determinations based on paper-based applications is very limited, based on peer experience. This model usually results in the overwhelming majority of applicants being determined eligible for all trips. However, when mobility coordinators are able to discuss with applicants their functional abilities, and then observe them walk/roll through a simulated transit trip, they are in a far better position to differentiate between trips that the applicant can and cannot take on transit. As a result, conditional eligibility determinations in the 15 to 30 per cent range for in-person assessments are quite common.

Prior to implementation of the pilot program, Comox Valley handyDART did not use the "conditional" category, and found all applicants either eligible for all trips or (rarely) ineligible. As a result of the

² Conditional eligibility refers to cases where users may be able to use the conventional system for some trips but require handyDART at other times such as depending on their physical condition that day, inclement weather or conditions like night blindness

enhanced process, 11 per cent of registrants were granted conditional eligibility in 2014/15, which, although lower than industry standards, is an improvement over the previous model's close-to-zero per cent. The fact that this is lower than industry standards could be due to the fact that half the assessments did not involve in-person assessments.

Quality of Conditional Eligibility Language: An accurate eligibility process produces conditional eligibility language that is sufficient to allow schedulers/dispatchers to make decisions about the eligibility of specific trips. For example, if someone has night vision limitations, the language should clearly state during which hours the registrant would be unable to ride transit so that the dispatcher can decide whether the trip request falls into that time period. The specificity of the language becomes even more critical when indicating distances that the registrant is able to ambulate.

For Comox Valley handyDART, the mobility coordinators provide sufficient information for a portion of the registrants to receive service based on winter conditions (and other conditions). For example, some riders can maneuver their mobility devices and access conventional transit in good weather, but would not be able to overcome obstacles such as snowy paths in the winter, and would therefore be eligible for handyDART for those trips. In addition, some riders of manual wheelchairs or those who have breathing problems are eligible for handyDART trips in which traversing a steep incline is required. As a result of the revised process, trip request patterns are more reflective of applicants' true abilities to ride conventional transit, and capacity is freed up for additional trips.

Changes in Registration and Ridership Trends: Custom transit systems that introduce in-person assessments often document a slowing down in the rate of increase in registration and ridership, and sometimes even experience a decrease in these numbers. In a BC context where custom transit systems are generally at or over full capacity, reduction of new registrants or in the trips taken by conditionally eligible registrants do not necessarily lead to a reduction in overall trip demand. The capacity that is freed up as a result of these avoided trips can simply be replaced by currently unfulfilled trips or latent demand (i.e. current registrants are able to take trips that would formerly have been denied). Although this may not result in a net cost savings, it does contribute to delaying the need for service expansion. Furthermore, it has the important benefit of expanding mobility options for those who are certified under a more accurate process and are unable to use conventional transit.

The number of active handyDART riders in the Comox Valley has remained essentially static for the past three years (averaging between 624 and 632 registrants) despite the Comox Valley area's growing elderly population. Ridership on the service was already starting to decline in the period before the introduction of the pilot project, from 31,450 in 2012/13 to 30,453, in 2013/14 (accounting for the beginning of the pilot period) and continued to decline to 29,044 in 2014/15. The reason for this trend is that the operator had been regularly using taxi supplement as a means of providing handyDART runs, but has since been instructed to use taxi supplement for its original purpose of providing exception trips as over usage resulted in decreased budget availability for "relief" taxi usage. Due to these capacity constraints, it is not possible to determine the extent to which the new eligibility process contributed to ridership declines versus the limit that was placed on service provision due to budget limitations. It should be noted that the monthly averages for unmet trips in 2014 and 2015 remained fairly steady, increasing only slightly from 58 to 65 per month.

7. Overall Findings

In summary, the primary areas in which there have been significant improvements as a result of the pilot program are:

- As a result of a better informed public, some individuals who initiate the application process are deciding that handyDART isn't for them upon learning more about the suite of available transit services, which means that applications are being completed in smaller numbers.
- In-person assessments are enabling handyDART dispatchers to apply trip conditions in a way that was not possible prior to pilot implementation, resulting in a freeing of capacity to meet other trip requests.
- Based on follow-up telephone surveys with applicants who participated in an in-person assessment, all those surveyed found it to be a positive and respectful experience.
- More than half of the applicants surveyed reported that they learned new information about local transit options after speaking with a mobility coordinator.
- The number of active registrants in the custom transit system has remained stable for the past three years, and ridership has not increased during this time. To the extent that the revised eligibility process has contributed to this trend, it has resulted in the avoidance of potential operating cost increases.

8. Recommendations

It is recommended that the revised registration process continue with the established protocols from year one. While previous discussions indicated that year two could potentially involve re-evaluating the eligibility of current registrants, it is recommended that this action be deferred since the focus on new registrants has demonstrated it is already making an impact on managing growth without disrupting existing long term users.

Under the terms of the original pilot project, Comox Valley Regional District had agreed to contribute 16.5 percent towards the costs in year two, with BC Transit contributing the remaining 83.5 per cent. BC Transit has since elected to cover all costs from March until August 31, 2015 of year two, which will allow for completion of the evaluation phase of the program. After such time – pending local and provincial approval to continue the program – the revised cost to the Comox Valley Regional District for the remainder of year two is estimated at \$5,000. In year three the percentage contributions will return to the traditional custom transit cost sharing ratio of 33.3 per cent local funding and 66.6 per cent provincial funding, for a local cost of approximately \$10,000 in year three.

In July 2015 BC Transit's Board of Directors approved the recommendation that the Comox Valley handyDART revised registration process continue and that the project be expanded to other handyDART systems. All projects are subject to available provincial funding.

It is therefore recommended that the Comox Valley Regional District:

- **Receive this report as information;**
- **Approve the recommendation to continue the revised registration process focussing on new registrants, subject to confirmation of provincial funding.**