

Evaluation of Custom Transit Registration Pilot Project: Vernon Regional handyDART

1.0 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 City of Vernon, Vernon Accessibility Advisory Committee, District of Coldstream and Electoral Areas B and C, implemented the handyDART Registration Pilot Project on February 14, 2014. The revised process includes an in-person assessment with a mobility coordinator (contracted third-party occupational therapists at Meridian Rehab) in order to match the applicant's needs with the most appropriate type of transit services available. The process takes into account each individual's travel needs in addition to their cognitive and physical abilities with regard to using the conventional bus. 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 Vernon 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.

2.0 Pilot Project Results

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

- 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

2.1 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. 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 Vernon Regional handyDART context, these could include proportion of applications that are incomplete (applicant chooses not to continue with application after submitting initial paper application) or result in no-shows; proportion of mobility assessments versus phone interviews; physical assessments versus other categories; 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?

In terms of the qualitative experience, follow-up telephone surveys were conducted 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. This included responses such as, “[learned that] buses are accessible”, “learned what was available. [I am] more informed for the future” and “I can take conventional buses easily.”

2.2 Eligibility Program Characteristics

In order to gauge the effectiveness of the eligibility process for Vernon Regional handyDART, we compared some of the 2014/2015 outcomes with industry standards and with contractual requirements. Following are some of the key findings:

- 13% of the 225 applicants chose not to continue with the application process after submitting their initial paper application (incomplete applications), and an additional 5% failed to appear for their in-person assessment. These numbers are very low (i.e. positive) in terms of industry standards, where it is not uncommon for 20 to 30% of applicants to cancel or “no-show” their assessments.
- 77% of the assessments were based on in-person assessments, with the balance based on telephone interviews. This is very close to the proportion indicated as a guide in the Meridian Rehab contract (ratio of 70/30).
- The breakdown in category of “most limiting disability” among applicants is as follows: physical (80%); cognitive (16%); vision (3%); psychiatric (1%). While these percentages tend to vary somewhat in communities based on demographics and availability of services for people with different disabilities, these percentages are fairly typical of those found in other systems.
- 26% 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 Vernon compares very favorably with industry standards which usually vary between 50% and 80%.

2.3 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.

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 to 25%.

Annual application submissions for Vernon Regional handyDART have declined slightly over the past three years, from 247 to 225 for the year ending February 2015. 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, a reduction in actual applications completed 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 incomplete applications and no-shows into account, the number of completed applications in year one of the pilot project was 184, or 25%, which is consistent with industry standards.

Proportion of Conditional Eligibility Determinations: The ability of eligibility assessors to make conditional eligibility 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% range for in-person assessments are quite common.

Prior to implementation of the pilot program, Vernon Regional handyDART did not use the “conditional” category, and found all applicants either eligible for all trips or (rarely) ineligible. As a result of the enhanced process, 11% of registrants were granted conditional eligibility in 2014/15, which, although lower than industry standards, is an improvement over the previous model’s zero percent.

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 Vernon Regional handyDART, the mobility coordinators provide sufficient information for a portion of the registrants to receive service based on winter 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 fully capacity constrained, 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 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 has remained essentially static for the past three years (averaging between 606 and 628 registrants) despite the Vernon 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 56,609 in 2012/13 to 51,780 in 2013/14 (which included the beginning of the pilot) and continued to drop slightly after the pilot program was initiated, to 50,976 in 2014/15. While these numbers are largely attributed to the system’s capacity constraints, what is more noteworthy is the decline in “unmet trips” (trip requests that cannot be fulfilled). From March 2014 through February 2015, the total number of unmet trips decreased by 69% compared to the previous year.

3.0 Overall Findings

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

- More individuals are able to get trips that they need, as reflected in the decline of “unmet trips”
- As a result of a better informed public, some individuals who initiate the application process are deciding that the service isn’t for them and are completing applications 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
- Active registration base has remained stable for the past three years, and ridership has not increased during this time, thereby avoiding potential operating cost increases

4.0 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 also 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, the City of Vernon had agreed to contribute 16.5% towards the costs in year two, with BC Transit contributing the remaining 83.5%. BC Transit has since elected to cover all costs for the second year until June 30, 2015. After such time – pending local and provincial approval to continue the program – the revised cost to the City of Vernon 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% local funding and 66.6% provincial funding, for a local cost of approximately \$10,000 in year three.

In May, 2015 BC Transit will be submitting its recommendation to its Board of Directors that the Vernon Regional handyDART revised registration process be approved to continue throughout years two and three. All projects are subject to the approval of the BC Transit Board of Directors and available provincial funding.

It is therefore recommended that the City of Vernon:

- **Receive this report as information;**
- **Approve the recommendation to continue the revised registration process focussing on new registrants, subject to BC Transit Board of Directors approval and confirmation of funding.**