Regional Specialized Transportation: Assessment and Recommendations

SINA ZARIFI

Public transportation in the Puget Sound region of Washington State is provided for by seven transit agencies and the state ferry system. Through the Puget Sound Council of Governments (PSCOG), these providers cooperate to improve the regional public transportation system and to encourage intersystem use. This regional cooperation has not yet extended to providing for specialized transportation services. The Puget Sound Council of Governments formed a committee to study regional travel for specialized transportation users to appraise policies affecting specialized transportation and to promote service parity. The existing conditions, assessment findings, recommended policy direction, and implementation actions developed by the study group are reported in this paper. This study included the six-county area of Jefferson, King, Kitsap, Pierce, Snohomish, and Thurston counties, Washington.

Public Transportation in the Puget Sound region is provided for by seven transit agencies and the state ferry system. Through the Puget Sound Council of Governments (PSCOG), these providers encourage intersystem use. This regional cooperation in providing intercounty travel has not yet been reflected in the provision of specialized transportation services. It is difficult for the users of specialized transportation (elderly, disabled, or elderly and disabled) who need to cross county lines to receive service from local transportation service providers. Defined service areas of each transportation property have resulted in service denial to many of those who are crossing from one service area to another. Specialized transportation services, however, are not denied to most fixed-route users.

BACKGROUND

The Transportation Operators Committee of the PSCOG formed a special task force to address the state of specialized transportation services in the Puget Sound Region. The task force also was to develop methods to facilitate the operation and administration of these services regionwide. The objective was to develop a regional system to provide specialized transportation services and, thereby, establish accessible regional travel for the user.

This report resulted from six months of assessment and includes specific findings, recommended policy direction, and implementation actions. The assessment covered specialized transportation services provided in the PSCOG’s four counties—King, Kitsap, Pierce, and Snohomish—plus the adjacent counties of Thurston and Jefferson. (See Figure 1.)

Approach

Several interagency issues were identified to develop alternatives and formulate recommendations for a regionally coordinated specialized transportation system. The task force selected eligibility criteria, trip reservation, and service delivery as priority issues.

For each issue, the task force developed several alternatives for regional coordination and cooperation and evaluated them on the basis of the following operational and administrative criteria:

- Customer responsiveness: Ability to ensure customer satisfaction with service quality, timeliness, ease of use, understanding of service, and service delivery.
- Regional marketability: Ease of presentation to the public; degree to which message and materials can be standardized, accepted, and understood.
- Cost investment: Additional investment required to implement alternatives.
  - Staff: Staffing requirements to support alternative.
  - Capital: Initial developments and implementation costs associated with alternative.
  - Operating: Ongoing service operating costs.
- Regional cost-effectiveness: Comparative estimates of the degree to which the benefits of development, implementation, ongoing operation offset the cost.
- Feasibility: Degree to which the present system can support the specific alternative.
- Ease of implementation: Overall practicality of choosing and implementing a specific alternative.
- Special consideration: Issues that will need to be addressed and resolved before a specific alternative can be recommended.

The alternatives generally ranged from autonomous administration to consolidated regional administrative responsibilities, including

- Status quo: Seven autonomous programs, informal cooperation, minimal coordination.
- Cooperation: Increased communication, information sharing, and consultation. May formalize cooperative activities through PSCOG or Washington State Department of Transportation. Maintain separate agency identity and policy-setting function.
- Formal coordination: Formal cooperation including inter-agency agreements to coordinate some services. All services remain independently administered.
- Standard regulations and policies: Formal agreement among agencies to establish regional and standard operational policies and regulations. Agencies will maintain separate identity and services will be administered independently.
- Single regional program: Centralized administration of services through a single local or regional agency or organization, which could be public, private nonprofit, or private sector.

Results

Task force results included specific policy recommendations and implementation actions. The evaluation took a qualitative approach and the findings are derived on the basis of the collective experience and perspectives of the task force members. This paper is a report on the state of specialized transportation and its problems. Findings and recommendations for the establishment of a regionally coordinated program are also reported.

OVERALL ASSESSMENT

Definition

Specialized transportation in the Puget Sound region is defined as those transportation services provided to elderly or disabled persons. These services are provided by public transportation agencies directly or through contracts with private transportation providers. Specialized transportation services include the following: regional reduced-fare permit, accessible wheelchair lift-equipped service, and transportation by appointment (e.g., dial-a-ride, dial-a-van, and door-to-door van service).

Existing Conditions

Public Operating Programs

Public transportation in the Puget Sound area of Jefferson, King, Kitsap, Pierce, Snohomish, and Thurston Counties is provided by seven transit agencies and the Washington State ferries. Specialized transportation services are provided as
part of the public transit agencies' overall public transportation programs. (A directory of public and private specialized transportation providers within the six counties of Puget Sound area is available from the Information Center of the Puget Sound Council of Governments.)

The region's public transit systems vary in scale of operation and services. Table 1 shows the variations in service areas, ridership volumes, fleet sizes, and operating budgets. Each system operates independently under the governance of its respective board. As a result of this, policies and procedures such as eligibility criteria and service delivery vary widely. Table 2 provides a regional comparison of specialized transportation programs.

### Private Transportation Providers

Specialized transportation services offered by the region's public transit agencies are provided primarily through contracts with private transportation operators. Throughout the Puget Sound region, several private operators provide a wide range of services, such as door-to-door or wheelchair accessible services to those elderly or disabled persons unable to use fixed-route public transit.

### Need for Regional Cooperation

The existing public transit agencies' policies and regulations governing the provision of specialized transportation services make intercounty travel very difficult. The topography and growth pattern of the region require service providers to take many daily trips to cross several jurisdictions served by various transit systems (see Figure 1). These public transportation providers operate independently under the governance of their respective boards. Each agency has its own procedures, eligibility criteria, and services. No formal authority exists to dictate coordinated services. Nonetheless, there is a strong commitment toward voluntary interagency cooperation. Through the PSCOG the region's public transportation agencies cooperate to accommodate intercounty travel. As fixed-route transit services are becoming increasingly available to cross-county travelers, regional specialized transportation services are not being provided for.

### Evaluation of Alternatives

Several issues needed to be addressed to make recommendations for future regional specialized transportation service. Because each agency had its own eligibility criteria, different service hours, and requirements, extensive evaluation of potential complications and eventual compliance was necessitated. Confounding these issues was the reality that the extent of need or desire for regional specialized transportation services is unknown. For instance, although King County boasts a more extensive medical community than other counties, no provider knew the actual number of trips individuals from other counties would require for visits to these medical facilities. Since the service has not been offered, statistics were not available.

Each of the agencies, however, has on occasion arranged a regional specialized transportation trip. In most cases, this arrangement has occurred through numerous phone calls and exceptional consideration. At no time has this service been promoted; customers are encouraged to find other options.

Several interagency issues were identified for the development of alternatives and formulation of recommendations. Eligibility criteria, trip reservation, and service delivery were selected by the task force as priority issues that needed to be
addressed and resolved. Various alternatives were examined to see which would best meet the goals of increasing customer responsiveness, marketability, and ease of implementation while not causing undue cost investment. Tables 3–5 provide the detailed evaluation for each issue area.

Examination of alternatives has resulted in the following options:

- **Status quo**: Limited options for direct intercounty specialized transportation services. Informal (albeit extremely infrequent) agency cooperation for intercounty trips. No real responsibility for coordination of intercounty trips although the resident transit agency takes on the responsibility when the customer cannot be persuaded to use another option.

- **Voluntary cooperation**: More formalized communication between transit agencies concerning intercounty travel needs. Intercounty trips continue to be provided by the existing agencies. Each agency maintains its own policy-setting function. Trips provided on a case-by-case basis. No marketing. Responsibility for coordinating trips rests with the resident transit agency.

- **Formal coordination**: Agencies enter into formalized agreements with neighboring agencies to clarify the type and level of service to be provided. Intercounty trips continue to be provided by existing agencies. Each agency maintains its own policy-setting function. Some marketing done by each agency. Responsibility for coordinating trips remains with the resident transit agency but could be shared with the customer.

- **Standard policies and regulations**: Formal agreement among agencies to establish regional standard operating policies and procedures for intercounty specialized transportation trips. Trips continue to be provided by the existing agencies that still maintain separate identities. Policy setting function might transfer to regional body. Marketing opportunities enhanced. Responsibility for scheduling intercounty trips could transfer to the customer.

- **Single regional program**: Centralized administration of intercounty specialized transportation services. Could function as direct provider, information broker, or a combination. Responsibility for coordination would rest with the regional agency.

**Regional Assessment Findings**

- Customer need and market potential for regional specialized transportation service exist; the volume is unknown
but expected to grow as the trend toward suburban and rural dwelling continues to expand.

- Regionally, specialized transportation services are not adequately or effectively responding to customer needs.
- Lack of consistent eligibility criteria, procedures, and service provision hinders ease of providing specialized transportation services between counties.
- Agencies need to resolve differences in eligibility criteria. These criteria differ for age, residency, income, and doctor certification.
- Agencies need to resolve the differences in trip reservation procedures. Agencies have differing restrictions for subscription trips, advance reservation notice, and hours when reservations will be taken.
- Agencies need to resolve the differences in service provision. Hours of service, fare structure, and wheelchair accessibility differ among the agencies.
- The Americans with Disabilities Act (ADA) will influence service provision throughout the Puget Sound region. (A summary of the ADA’s sections pertaining to provision of public transportation is available from the Puget Sound Council of Governments.)

- With the passage of the ADA, agencies will be required to offer service comparable to fixed-route services. (Definition of “comparability” must be determined.)
- Some of the limiting factors included in eligibility criteria for specialized transportation services will no longer be valid.

### RECOMMENDATIONS

**Recommended Policy Direction**

After careful consideration and evaluation of the various service options, formal coordination was selected as the preferred option. The task force determined that this option would provide a significant improvement in service over what is now available to specialized transportation customers. It would require clearly stated, standardized information about available service that would be useful, understandable, and marketable to customers. This option would be feasible and comparatively easy to implement because it balances cost-funding issues with the customer’s need for service and recognizes local operational decisions and approaches, which
### TABLE 3: ELIGIBILITY CRITERIA: REGIONAL EVALUATION

<table>
<thead>
<tr>
<th>RANGE OF BASIC ALTERNATIVES</th>
<th>MINIMUM QUALIFYING AGE</th>
<th>SENIOR CITIZEN QUALIFYING AGE</th>
<th>DOCTOR CERTIFICATION</th>
<th>RESIDENT OF COUNTY</th>
<th>INCOME REQUIREMENT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cooperation</td>
<td>*Allow use if met other agency requirements.</td>
<td>*Allow use if met other agency requirements.</td>
<td>*Allow use of other agency services if not resident agency certification.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Formal Coordination</td>
<td>*Letter of agreement to allow use and/or transfer without meeting other agency's age requirement. *No registration by other agencies required (case-by-case basis).</td>
<td>*Letter of agreement to allow use and/or transfer without meeting other agency's age requirements. *No registration by other agencies required (case-by-case basis).</td>
<td>*Resident agencies will register if person has already been certified by another agency. *Meets resident agency registration requirements, can use service.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Standard Regulations &amp; Policies</td>
<td>ALL AGENCIES AGREE TO FOLLOW SAME POLICY AND PROCEDURE</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Single Regional Program</td>
<td>*No minimum age requirement. Same as fixed route.</td>
<td>*One senior citizen qualifying age.</td>
<td>*Certification will be required from disabled applicants only, using a standard regional criteria.</td>
<td>*No residency will be required.</td>
<td>*No income requirements.</td>
</tr>
<tr>
<td>ADA Requirements</td>
<td>None</td>
<td>None</td>
<td>None</td>
<td>None</td>
<td>None</td>
</tr>
</tbody>
</table>

### TABLE 4: TRIP RESERVATION: REGIONAL EVALUATION

<table>
<thead>
<tr>
<th>RANGE OF BASIC ALTERNATIVES</th>
<th>TRIP PURPOSE RESTRICTIONS</th>
<th>Subscription Trips</th>
<th>HOURS AVAILABLE FOR RESERVATIONS</th>
<th>MAXIMUM ADVANCE RESERVATION</th>
<th>MINIMUM NOTICE REQUIRED (HOUR)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cooperation</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Formal Coordination</td>
<td>* Letter of agreement to provide service with no trip restrictions.</td>
<td>* Agreement among agencies to provide subscription trips, which access county lines.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Standard Regulations &amp; Policies</td>
<td>* All agencies agree to have the same policy &amp; regulations.</td>
<td>* All agencies are to have the same policy and regulations.</td>
<td>* All agencies agree to have the same range.</td>
<td>* All agencies agree to have the same range.</td>
<td>* All agencies agree to have the same range.</td>
</tr>
<tr>
<td>Single Regional Program</td>
<td>* No restrictions. Allow use for all purposes.</td>
<td>* Subscription trips limited to an agreed % of total service.</td>
<td>* Same hours and days region wide.</td>
<td>* Same reservation notice across region.</td>
<td>* No minimum notice required.</td>
</tr>
<tr>
<td>ADA Requirements</td>
<td>* No restrictions. Allow use for all purposes.</td>
<td>None Specified</td>
<td>None Specified</td>
<td>None Specified</td>
<td>None Specified</td>
</tr>
</tbody>
</table>
Table 5 Service Delivery: Regional Evaluation

<table>
<thead>
<tr>
<th>BASIC ALTERNATIVES</th>
<th>HOURS OF SERVICE</th>
<th>FARE STRUCTURE</th>
<th>PERCENT VEHICLES WHEELCHAIR ACCESSIBLE</th>
<th>COORDINATION WITH OTHER PROVIDERS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Status Quo</td>
<td>*Partial consistency. *Services available, for most part, during business hours (8-5). *50% of agencies offer service on weekends.</td>
<td>*No consistency.</td>
<td>*Partial consistencies.</td>
<td>*Minimum coordination, mainly within the county services.</td>
</tr>
<tr>
<td>Cooperation</td>
<td></td>
<td></td>
<td></td>
<td>*Provide accessible service as needed.</td>
</tr>
<tr>
<td>Formal Coordination</td>
<td>*Letter of agreement to provide service through a contract provider after regular service hours.</td>
<td>*Allow transfer with customer paying the difference. *Letter of agreement to accept the use of agency transfers, and set fare reimbursement system.</td>
<td>*Provide accessible service as needed.</td>
<td>*Letter of agreement to allow travel within other counties, on case-by-case basis.</td>
</tr>
<tr>
<td>Standard Regulations &amp; Policies</td>
<td>*Same policies and regulations.</td>
<td>*Same policies and regulations.</td>
<td>*Same policies and regulations.</td>
<td>*Same policies and regulations.</td>
</tr>
<tr>
<td>Single Regional Program</td>
<td>*Hours of service to be compatible with regular transit service.</td>
<td>*One single regional fare structure.</td>
<td>*All vehicles, new and refurbished, must be accessible.</td>
<td>*No coordination required due to availability of regional system.</td>
</tr>
<tr>
<td>ADA Requirements</td>
<td>*Comparable to fixed route.</td>
<td>*Either comparable to fixed route or not more than fixed route.</td>
<td>*All vehicles, new and refurbished, must be accessible.</td>
<td>*Transit agencies ultimately responsible for implementation whether administered singularly or jointly with other agencies.</td>
</tr>
</tbody>
</table>

May differ among areas. Upon initiation of coordinated specialized transportation services, it would be easier to revise agreements to reflect unanticipated situations or changing conditions than it would be under a more aggressive policy alternative. It provides greater flexibility.

- Maintain individual agency commitment to specialized transportation services, including intercounty trips.
- Adopt formal coordination among agencies through the development and establishment of interagency agreements.
- Interagency agreements would address intercounty trips only.
- Agencies could maintain eligibility criteria, procedures, and service provision desired for nonintercounty trips.
- Develop equitable cost sharing arrangements for all intercounty trips.
- Determine the feasibility of developing a policy for equitable use of vehicles that have made an intercounty trip and are waiting for a return trip.
- Seek funding opportunities to support and develop regional specialized transportation services.

Note that the task force believes that this option should be looked at as a test (or a stepping stone) toward exploring an alternative that may be even more customer responsive, such as the standard regulations or single agency options. Formal coordination may allow for a test of the waters so that agencies will know exactly what the market is and which of the options will best and most cost-effectively serve that market.

Recommended Actions

Establish a regional task force to develop formal coordination policies and agreements, which will ultimately provide intercounty specialized transportation services.

1. Determine the effect of the ADA upon specialized transportation services currently offered by each agency.
2. Evaluate eligibility criteria, procedures, and service provision and determine which levels of each are acceptable on a regional basis.
3. Evaluate effect of high capacity transit and privatization issues on specialized transportation.
4. Assess and evaluate the feasibility of direct service versus transfer service.
5. Develop an interagency agreement for provision of specialized transportation services that cross county lines.
6. Propose to providers a pilot project for provision of specialized transportation services.
7. Seek funding to help defray the costs associated with the provision of these services.
8. Create and implement a marketing plan that can be used by each individual agency to promote the pilot project.
9. Evaluate the effectiveness of the pilot project and recommend further action.

GLOSSARY

Americans with Disabilities Act (ADA)—Signed into law in July 1990, the ADA is a comprehensive national mandate to end discrimination against individuals with disabilities. It was established to provide enforceable standards addressing discrimination against individuals with disabilities and to ensure that the Federal Government plays a central role in enforcing these standards on behalf of individuals with disabilities.

Community Transit—A public transportation provider operating within Snohomish County Public Transit Benefit Area (PTBA).

Door-to-door service—Transportation service between the precise trip origin and destination points, without interchange or the use of other modes.

Dial-a-ride—A demand-responsive system providing radio controlled dispatched door-to-door or point-to-point service.

Disabled—Any individual who, by reason of a medically determinable physical or mental impairment that can be expected to last for a continuous period of not less than three months, is unable without special facilities, planning, or design to utilize mass transportation facilities and services as effectively as persons who are not so affected.

Elderly—Persons age 65 and older.

Everett Transit—A public transit agency operating in the city of Everett, Washington.

Intercity Transit—A public transportation provider operating within Thurston County, PTBA.

Jefferson Transit—A public transportation provider operating within Jefferson County, PTBA.

Kitsap Transit—A public transportation provider operating within Kitsap County, PTBA.

Municipality of Metropolitan Seattle (Metro)—A public transportation provider for the city of Seattle and King County, Washington.

Pierce Transit—A public transportation provider operating within Pierce County, PTBA.

Puget Sound Council of Governments (PSCOG)—Metropolitan planning organization for the four county region of King, Kitsap, Pierce, and Snohomish.

Puget Sound Region—Includes the counties of Jefferson, King, Kitsap, Pierce, Snohomish, Thurston, and the operational service area of the Washington State Ferry System.

Specialized Transportation—Transportation services provided to elderly or disabled persons such as dial-a-ride, dial-a-van, and door-to-door wheelchair accessible service.

Standing Committee on Transportation—The transportation policy committee of the PSCOG, composed of local elected officials, representing the four county region.

Transportation Operators Committee—A technical committee of the PSCOG, composed of the region's public transportation providers, which addresses public transportation issues, explores, and implements opportunities for intersystem coordination and cooperation.

Trip Purpose—The primary reason for making a trip, such as work, shopping, and medical appointment.