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**Brevard County  
Local Coordinating Board  
Trip Priorities & Eligibility Workshop**

**Summary Report**

**April 24, 1995**

**Conducted by:**

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## **Brevard County Local Coordinating Board Trip Priorities & Eligibility Workshop**

**April 24, 1995**

### **Overview**

On April 24, 1995, the Center for Urban Transportation Research (CUTR) conducted a Trip Priorities & Eligibility Workshop for the Brevard County Local Coordinating Board (LCB). The purpose of the workshop was to provide an interactive forum for LCB members to discuss trip priority and eligibility issues with the goal of deciding whether to recommend that Space Coast Area Transit (SCAT) implement more formal client eligibility and priority-setting procedures. SCAT outlined seven goals for the workshop:

- ① Allow all of the LCB members to hear the range of possibilities related to the type of demand management tools that exist.
- ② For the LCB members to hear the legal possibilities that the Florida Statutes and Administrative Code allow related to priorities and eligibility.
- ③ For the LCB members to understand that while [SCAT is] not currently using eligibility or age, [SCAT has] been using various techniques to manage the system (i.e., zones, standing order limits, trip goals, etc.).
- ④ For LCB members to understand the current users of the system and how the various eligibility parameters might impact the current services.
- ⑤ For the LCB members to reach a consensus on the direction that they would like to go. For the members to be able to express this opinion/decision in a written form to the Board of County Commissioners.
- ⑥ To develop a written account of the workshop for reference by the Board of County Commissioners, TD Commission and other CTCs around the state.
- ⑦ Develop some cost estimates for the implementation of any new eligibility parameters.

The workshop was able to achieve each of these goals, as well as providing for enhanced audience participation, not anticipated at the time the workshop was originally requested.

**Background**

In October 1991, Coastal Health Systems began operating demand-responsive paratransit services under contract to the county. In June 1992, after grappling with various approaches to control the demand for transportation disadvantaged (TD) paratransit service, the LCB and Board of County Commissioners (BOCC) adopted a Passenger Management System (PMS) to set trip purpose priorities for TD trips (the PMS program does not include trips purchased by sponsoring agencies such as Medicaid). In 1994, SCAT began providing the TD paratransit trips itself, except for Medicaid trips, which are still provided by Coastal.

**Passenger Management System**

The Passenger Management System was approved on June 22, 1992. The system was established to acknowledge that the demand for TD transportation service exceeds the available supply and/or available funding for non-sponsored TD trips. The LCB and BOCC approved the following four priorities for TD trips provided by SCAT and any subcontractors: 1) medical/doctor appointments/physical therapy, prescriptions; 2) food shopping; 3) employment; and 4) other trips including recreation, general shopping, and personal business.

Further, the system established quantified goals to use as a guideline for ensuring the desired mix of TD trips were provided, given scarce resources. The following table shows the goals and actual percentages of trips.

<b>Brevard County Passenger Management System</b>		
	<b>Goal</b>	<b>Actual</b>
<b>1. Medical-related</b>	55%	53%
<b>2. Food shopping &amp; nutrition</b>	5%	2%
<b>3. Employment</b>	20%	22%
<b>4. Other</b>	20%	23%
Sources: Passenger Management System and SCAT (April 1995).		

Prior to the workshop, SCAT staff provided LCB members with copies of all relevant information in a 120-page bound document, titled "Historical Information / Brevard County Local Coordinating Board for Transportation Disadvantaged Services: Trip Priorities & Eligibility Workshop / April 24, 1995." The document included the following items:

- ▶ Overview
- ▶ Chapter 41-2 Florida Administrative Code
- ▶ 12/17/91 - Board Action
- ▶ 10/28/91 - LCB Minutes
- ▶ 11/01/91 - Memo from Perry Maull
- ▶ 11/18/91 - LCB Minutes
- ▶ 03/30/92 - LCB Agenda Item
- ▶ 03/30/92 - LCB Minutes
- ▶ 06/22/92 - LCB Agenda Item, Re: Low Income Procedures
- ▶ 06/22/92 - LCB Agenda Item, Re: Passenger Management System
- ▶ 06/22/92 - LCB Minutes
- ▶ 01/25/93 - Goals Agenda Item & LCB Minutes
- ▶ 12/06/94 - Board Agenda & Minutes, RE: Request to Review Eligibility

Copies of CUTR's 1993 publication, "Guidelines for Developing Trip Priority Procedures for Non-Sponsored Trips Purchased with TD Commission Funds," also were distributed to the LCB members for reference.

## **Workshop - Introduction**

The workshop was conducted as a public meeting. The workshop facilitators, Rosemary Mathias and Jennifer Hardin, decided to design a workshop that would allow participation by both the LCB members and the audience observers. This approach was especially appropriate given the topic and the six-hour duration of the workshop. Accommodations were made to enable the audience members to eat lunch with the LCB members, allowing them to be fully involved in the day's activities. Twelve of the LCB members participated; 18 audience members also participated, primarily representing agencies whose clients use TD transportation services. Copies of the workshop agenda and handouts are included in Appendix A.

The introduction to the workshop was used to introduce the topics of eligibility and trip priorities in general. It included a description of the issue of unmet demand for services;

that is, the fact that demand exceeds supply and that the purpose of the workshop was to determine whether additional steps were needed to ensure that trip priority and eligibility determination practices in Brevard County are appropriate for the local conditions.

Further, the purpose of the workshop was related to the issue of the recently adopted Transit Development Plan (TDP) recommendations, which included the need to develop a plan for using new TD Trust Fund money available from the state as well as the need to establish eligibility requirements for TD and service provided under the Americans with Disabilities Act of 1990 (ADA). Particular attention was given to distinguishing between eligibility requirements for TD services (as described under FAC. 41-2.002(30)) and ADA complementary paratransit services (as described under 49 CFR 37.12(e)). This distinction is important because the ADA regulations are more explicit with respect to defining exactly who should be deemed eligible for service. Further, the ADA does not allow for trip purpose restrictions (or priorities) or capacity constraints; in contrast, the state-funded TD program does allow for trip priorities, as long as systems do not discriminate against particular persons or groups of persons.

### **Workshop - Interactive Session**

The bulk of the workshop was a nominal group exercise, designed to elicit ideas about who needs TD transportation services most in Brevard County. For logistical purposes, the group was split into two. Rosemary Mathias (with the assistance of Don Lusk) facilitated the LCB interaction; Jennifer Hardin (with the assistance of Jimmy Liesenfelt) facilitated the audience discussion. To start, each group was asked to write down their individual responses to the question:

*What are the characteristics of people in Brevard County who most need TD transportation?*

Each person was given approximately 10 minutes to brainstorm and write down his/her response. Each group independently recorded all of the answers on posters, which were posted on the wall. After the responses were recorded, participants were allowed to ask for clarification on any comments that were unclear. The lists generated by both groups are shown in Appendix B.

Next, each group was asked to pick the top five most important answers from the respective group list (i.e., LCB members ranked their top five responses using the LCB list

and audience members ranked their top five responses using the audience list). The results of the separate group rankings are shown below.

### **LCB Initial Rankings**

- ① Dialysis
- ② Working poor
- ③ Disabled without transportation to/from employment
- ④ Too old to drive (safely)
- ④ Socially isolated
- ⑥ Those with no transportation
- ⑦ Long-term illness & conditions
- ⑦ Disabled--non ADA eligible

### **Audience Initial Rankings**

- ① Work transportation (for those without transportation options)
- ② Low income health care (working poor)
- ③ Economically disadvantaged
- ④ Education
- ⑤ Vocational training
- ⑥ Geographically isolated
- ⑦ Low income elderly

Following a lunch break, the participants were shown the initial rankings from both groups (shown above) and were asked to rank their top three priorities based on the two lists combined. The results of the rankings were tallied while the LCB and audience received an update on the current status of the program, provided by Transit Services Director, Don Lusk. The individual and combined final rankings are shown below.

### **LCB Final Rankings**

- ① Dialysis
- ② Low income health care (working poor)
- ③ Working poor
- ③ Too old to drive (safely)

### **Audience Final Rankings**

- ① Low income health care (working poor)
- ② Work transportation (for those without transportation options)
- ③ Geographically isolated

### **Combined Final Rankings**

- ① Low income health care (working poor)
- ② Dialysis
- ③ Work transportation (for those without transportation options)
- ④ Working poor

The purpose of the nominal group process was to illustrate the complexity of the issue of determining who is most important to serve when resources are limited. Further, the workshop provided a forum for structured discussion, which allowed each person an opportunity to express his or her opinion.

The rankings by the LCB and audience were similar, as shown above. The combined top priority list, which was weighted to reflect the different numbers of participants in each group, incorporated all of the concerns of the two groups, except for audience concerns about geographically isolated individuals.

### **Workshop - Conclusions**

CUTR concluded the workshop with an overview of options available to the LCB for establishing more stringent trip priorities and/or eligibility requirements, if it so desired. The discussion was based on a Trip Priority Decision Process developed by CUTR, which is shown in Appendix A. This process suggests answering the following questions to determine whether a formal trip priority procedure would be desirable, given local circumstances:

- ① **Which trip purposes are currently served?**  
*What is the current distribution of trips?*
- ② **What is the system's productivity?**  
*Can productivity be improved?*
- ③ **Are trips being refused?**  
*When are trips being refused? How many trips are being refused?*
- ④ **Are trip priorities needed?**  
*If so, which trip priority procedure should be used (trip purpose, time of trip, number of trips, etc.)?*

In SCAT's case, the current trip distribution very closely matches the Passenger Management System described on page 2 of this report. According to SCAT's records, system productivity is approximately 2.0 passenger trips per vehicle hour. This productivity is probably reasonable, considering the elongated service area; however, SCAT should continue to work to improve productivity, which would result in more trips being provided. According to SCAT's records, three percent of the trips requested are turned down. Given these conditions it may not be necessary to institute additional trip priority restrictions at this point; however, SCAT should closely monitor its trip refusal rate and the types of trips that are being refused to ensure that the turndown rate does not increase.

Second, the LCB members were asked to consider the fundamental issue of passenger eligibility. At this time SCAT does not require age or (low) income verification. The TD transportation program was created for those persons who are "transportation disadvantaged," as defined by rule 41-2 FAC (see handouts in Appendix B). Income verification is difficult to do because of confidentiality issues and the myriad of ways in which income can be calculated.

CUTR suggested four strategies for dealing with eligibility issues:

- ① Continue current practice (no change);
- ② Use existing agency eligibility determination (either accept other agencies' determinations or adopt the same procedures to re-certify for SCAT);
- ③ Develop a new eligibility determination process  
- self-certify or require written documentation; or
- ④ A combination of ② and ③.

## **LCB Action**

During the final hour of the workshop the LCB chairwoman facilitated a discussion among board members to consider the appropriate action to be taken by the LCB with respect to trip priorities and eligibility determination.

With respect to trip priorities, the LCB voted to keep the Passenger Management System intact.

With respect to eligibility, the LCB voted not to impose a formal eligibility certification process at this time; however, SCAT was instructed to begin collecting additional information pertaining to passengers' ages, disabilities, and income levels as part of the

normal telephone reservation process. This information will be used to build a passenger profile to verify that passengers currently served by the system are part of the targeted TD population. The income questions will be phrased to determine whether clients fall below poverty guidelines established by the U.S. Department of Health and Human Services and will not ask for a person's specific household income. In effect, this approach is an informal adoption of the third option of passengers' self-certifying their eligibility.

Further, the LCB asked SCAT to monitor the time it takes to ask these questions to ensure that the phone system is not negatively impacted as a result of the additional time required to collect this information. (Eligibility questions will only be asked once, recorded into the passenger's permanent record, and will not have to be repeated during subsequent calls.) Several agencies represented in the audience volunteered to provide information to SCAT regarding the age and income status of their clients.

The LCB asked SCAT to provide an update on its experience gathering eligibility data at the next LCB meeting.

**Appendix A**  
**Workshop Handouts**

## **Brevard County Local Coordinating Board for Transportation Disadvantaged Services**

**April 24, 1995**

### **Workshop Agenda**

- I. Introduction**
  - expectations
  - definitions

- II. Interactive Session**
  - board members
  - audience members

**Lunch**

- II. Interactive Session - continued**

- III. Review**
  - eligibility & trip priorities
  - SCAT

- IV. Interactive Discussion**
  - results of morning session
  - options
  - recommended actions

## RELATED TD PROGRAM GOALS

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### Unmet Demand

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1. While medical transportation needs are critical, all needs should be reviewed so that no segment of our community is left unserved.
2. Work and training trips are important to self-sufficiency, expand such opportunities by establishing a plan to address needs, provided funds are available to defray cost.
3. Review the transportation needs of the socially isolated individuals.
5. Implement no-show policy and evaluate results.



## TRANSPORTATION DISADVANTAGED

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F.A.C. 41-2.002(30) "'Transportation Disadvantaged (TD)' means those persons who because of physical or mental disability, income status, or age are unable to transport themselves or to purchase transportation and are, therefore, dependent upon others to obtain access to health care, employment, education, shopping, social activities, or other life-sustaining activities, or children who are handicapped or high risk or at-risk ..."

# AMERICANS WITH DISABILITIES ACT

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## Complementary Paratransit Eligibility

49 CFR 37.123(e) "The following persons are ADA paratransit eligible: (1) Any individual with a disability who is unable as the result of a physical or mental impairment (including a vision impairment) ... to board, ride, or disembark from any vehicle on the system which is readily accessible to and usable (by) individuals with disabilities."

# AMERICANS WITH DISABILITIES ACT

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## Trip Purpose

49 CFR 37.131(d) "Trip Purpose Restrictions. The entity shall not impose restrictions or priorities based on trip purpose."

49 CFR 37.131(f) "Capacity Constraints. The entity shall not limit the availability of complementary paratransit services to ADA paratransit eligible individuals ..."

## Trip Priority Decision Process

Trip purposes  
currently served

What is the current distribution?

System  
productivity  
measures

What is the system's productivity?  
Can productivity be improved?

Trip refusal  
data

At what times are trips being refused?  
How many trips are being refused?

Are  
trip priorities  
needed?

Which trip priority procedure would  
be best?

- Trip purpose
- Time of trip
- Number of trips

Source: Center for Urban Transportation Research. Guidelines for Developing Trip Priority Procedures for Non-sponsored Trips Purchased with TD Commission Funds. Tampa, Florida: June 1993.

# TD PROGRAM ELIGIBILITY CRITERIA

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## Strategies

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1. Continue status quo
2. Use existing agency eligibility determination
3. Develop a new eligibility determination process
  - a. Self-certification
  - b. Documentation
4. Combination of 2 & 3

**Appendix B**  
**Initial Trip Priority Lists**

## Local Coordinating Board Priority List

### A. What are the characteristics of people in Brevard County who most need TD transportation? (responses shown in random order)

- Working poor
- Those with no/limited support systems
- Those with no transportation
- Too old to drive (safely)
- Too young to drive
- Disabled without transportation to/from employment
- Those who won't/can't drive
- Disabled vehicle
- Disabled no ADA eligible
- Socially isolated individual without access to public/private transportation
- Individual with complex needs/multiple support services
- Mentally disabled
- Low income persons
- Temporarily disabled and can't drive/short-time (medical-casts, etc...)
- Long term illness and conditions
- At risk children
- Low income job seeking
- Non-vehicle owners--because of income
- Dialysis patients--non-Medicaid
- Those who need escorts
- Escort service
- Children in general
- Urgent medical trips
- Parents of at risk kids, who are continuing education, etc...
- Stranded tourists
- Homeless
- Geographically Isolated
- Any adult continuing education
- Where/when there is no fixed route service
- Those who do not drive at night
- Elderly living with relatives with minimal family support

## Audience Priority List

### A. What are the characteristics of people in Brevard County who most need TD transportation? (responses shown in random order)

- Medical transportation out of county
- Transplant patient transportation needs
- Lack of public transportation
- More accessible bus stops/hubs
- Infrastructure/lack of access problems (unpaved)
- Non-medical emergency (shelter, protection, food, clothing)
- Extended public transportation hours
- Emotionally impaired
- Parents with special needs individuals
- Day care center auxiliary trips
- Education
- Need attendants to travel
- Low income health care needs (working poor)
- Snowbirds
- Elderly
- Lack of sheltered/secured waiting areas
- Economically disadvantaged
- Physically Impaired
- Low income elderly
- Unfamiliar—need transportation
- Mentally Impaired/unable to drive
- Economically disadvantaged pre-school
- Developmentally disabled (to center/program, etc...)
- Cancer treatment, needs, etc...
- Socially isolated
- Scooters/not bus accessible
- Dialysis
- Single parent with limited transportation
- No viable transportation for work
- Subsidize housing resident
- Vocational training
- Micco/Little Hollywood residents medical needs to Indian River County
- Geographically isolated/problem
- Transportation to seek work
- Unable to drive/can't afford automobile
- Social outings