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Report 99.694

18 November 1999

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[99.694.adc]

Report to the Passenger Transport Committee
By Anthony Cross, Manager Public Transport

Social Public Transport Services

1. Purpose

To follow up on the Committee's workshop on "social" public transport services.

2. Background

Since its formation, **Transfund** New Zealand has **categorised** concessionary fares, school bus services and Total Mobility as "social" services which it considers are outside its mandate to fund as they are inconsistent with its principal objective (specified in Section 3B of the Transit New Zealand Act) which is "to allocate resources to achieve a safe and efficient roading system".

The majority of public transport services – those which are not in one of the "social" categories and which are not regarded by **Transfund** as satisfying the "alternatives to roading" provisions (Section 3D of the Act) – are classified "community services".

Members of the Committee, at their workshop on social public transport services on 14 October 1999, developed the view that Total Mobility is the only fully **social** public transport service because, in this Region at least, school buses and half fares for school students make a significant contribution to the relief of road congestion. Without them there would need to be more public bus services (to accommodate students travelling to and from school), fewer adults using buses (those who would be disinclined to travel with students) and more students driving and being driven to and **from** school by car.

3. Total Mobility

The workshop concluded the Committee should adopt a "limited in" position with respect to Total Mobility. This is understood to mean that the Council will continue to commit funding of approximately \$1 million per year for Total Mobility (not including administration costs) on the understanding that, sooner or later, this "cap"

will mean that either fewer people will be eligible for assistance, or each eligible person will receive less assistance.

The Committee now needs to make some adjustments to its policy to guide the officers in implementing this strategy.

It is assumed that it is not generally feasible or appropriate to allocate access to Total Mobility on the basis of journey purpose. However, it is sometimes helpful (in explaining the scheme to people unfamiliar with it) to apply the following test, which is described more fully in the **appendix** to this report:

Would this person reasonably expect to make this journey by public transport if they did not have the disability which qualifies them for Total Mobility?

... Members of the Committee will recall that a report to the March meeting (copy **attached**) set out a number of options for limiting Total Mobility. These included:

1. Tightening the (national) eligibility criteria
2. Phasing out the Blue Voucher Scheme
3. Reducing the Rate of Subsidy
4. Rationing the Issuing of Voucher
5. Lowering the maximum subsidy per journey
6. Not funding infrastructure
7. Limiting the use of Total Mobility to and **from** school
8. Increasing the Budget

It is proposed that amending the eligibility criteria, together with some “tweaking” of options **2, 3** and **4**, will give the officers the flexibility they need to manage the Total Mobility budget in the short and medium term.

4. Eligibility Criteria

The current eligibility criteria, which were last **confirmed** nationally in 1993, are:

Eligible people are those who for reasons of physical, sensory, intellectual or psychological disability, whether congenital, acquired or age-related, satisfy the following criteria:

- *Cannot unaided (or could not if public passenger transport were available) complete any of the component activities involved in making use of public passenger transport.*

The component parts of public transport are defined as:

- *proceeding to the nearest bus stop/railway station*
- *boarding, riding securely and alighting; and*
- *proceeding from the destination stop to the trip end*

The following additional explanation and guidelines are proposed for consultation with parties likely to be affected:

The Regional Council has as one of its core activities the funding of a viable public transport system for the Region. As part of that commitment, it funds Total Mobility in recognition that some members of the community, in making the same journeys for the same purposes as others, are prevented from using public transport services simply by virtue of their disability.

Therefore, in allocating funds for Total Mobility, the Council will give preference to people whose ability to travel independently is limited only by the physical difficulty or impossibility of boarding or alighting from a bus or train operating on a scheduled service within the Wellington Region, taking into account the regular availability of services which are more readily accessible than others (in particular, services operated wholly or in part by super-low-floor and/or wheelchair-accessible buses or trains).

The lowest priority will be given to people who are fully dependent for all their needs (including but not limited to travel) on the care of others (for example, those who are in full-time institutional care, including resthomes), particularly where that care is mostly or completely funded through central Government health, disability, accident rehabilitation and special education programmes.

5. Implications

Members of the Committee need to be aware that, as a result of the proposed changes to the policy, the following groups of people are likely to be increasingly excluded from Total Mobility:

- People living outside the area where regular public transport is provided for the general population
- People living in resthomes and hospitals (as opposed to retirement villages)
- People with intellectual disabilities
- People with psychiatric illnesses

6. Recommendation

That the amendments to the Total Mobility eligibility criteria, as proposed in Report 99.694, be released for consideration by affected parties with a view to implementation from 1 July 2000.

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Attachments : 2

The Journey Purpose Test

Notwithstanding that it is not generally feasible or appropriate to allocate access to Total Mobility on the basis of journey purpose, it is sometimes helpful (in explaining the scheme to people unfamiliar with it) to apply the following test:

Would this person reasonably expect to make this journey by public transport if they did not have the disability which qualifies them for Total Mobility?

Examples of journeys where it would be reasonable to expect that the journey would be made by public transport (provided in each case that the journey is actually possible by public transport, and at the time when it is undertaken) would be:

- Journeys to and **from** work
- Journeys to and from school
- Journeys for shopping and personal business purposes
- Journeys for social purposes

In other words, the same range of journey purposes which apply to any member of the **community**.

Conversely it follows that, where a journey is directly related to the person's disability (for example, medical treatment or therapy which would not be necessary if the person did not have the disability), then it may not be appropriate to use Total Mobility.

The need for the journey is not in question. What is in question is whether it is appropriate for the journey to be paid for by the Region's public transport **funder**, rather than the national health service **funder**.

Likewise, use of Total Mobility is not likely to be appropriate in the following circumstances:

- Where the journey is to or from a point which is outside the area where regular scheduled public transport exists.
- Where the journey is undertaken outside the hours when public transport is available to a non-disabled person.
- Where a group of more than 2 or 3 people are travelling together on excursions for purposes such as sightseeing, picnics and sports events where non-disabled people would be more likely to charter a vehicle than to travel on a scheduled service.
- Where they are travelling for a reason which is directly related to their disability, such as for treatment or therapy which would not be necessary in the absence of the disability.



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Report 99.104

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Report to the Passenger Transport Committee
By Anthony Cross, Manager Public Transport

Total Mobility

1. Purpose

To seek the Council's approval to accommodate the growth in Total Mobility expenditure.

2. Background

At the Annual Plan meeting of **the** Committee on 23 February 1999, **the** Committee resolved as follows:

Resolved to Recommend

(Cr McQueen/Cr Turver)

- (1) That the Wellington Regional Council accepts a continuing involvement in Total Mobility.*
- (2) That the Wellington Regional Council recognises the forecast growth in demand for Total Mobility resources as a result of both social and demographic change.*
- (3) That the Wellington Regional Council works with the appropriate agencies to develop and refine criteria for eligibility for Total Mobility funding which will set the scheme at a long term sustainable level.*

- (4) *That the Wellington Regional Council in association with other Regional Councils approach Government at ministerial level with the aim of developing a formulae for joint central/regional Government funding, including from Transjind New Zealand.*
- (5) *That until these questions are resolved Wellington Regional Council funding be managed with goodwill towards Total Mobility clients but taking into account the overall Wellington Regional Council budget priorities.*
- (6) *That in association with other Regional Councils a system be evaluated and if practicable developed for the common application of Total Mobility throughout New Zealand.*

Resolved to Recommend

(Cr Shields/Cr Turver)

That in the light of the further work to be undertaken on the Total Mobility budget and to allow consideration of the results of that further work, the budget figure of \$957,000 be noted as interim until further recommendations are available from the Passenger Transport Committee.

When the current Facing the Future was put together, the Council took the deliberate decision -to cap the budget at \$840,000 plus administration per year, in the full knowledge that this would not satisfy growing demand for the service. The first **draft** of the document had provided for the budget to increase at the rate of 10% per year, thereby doubling within the 10 year planning period. This **recognised** the effects of **de-institutionalising** people with disabilities, and the increasing incidence of disability due to the relative ageing of the general population.

When the budget was capped in this way, Councillors believed that they were thereby **signalling** to central Government that the Council was not prepared to absorb increases in the cost of social services (at least partly due to cost-shifting resulting from **Government** policies) without additional sources of funding.

Councillors have always known that, sooner or later, the budget cap would mean that either fewer people would be eligible for assistance or each eligible person would receive less assistance. The development of the central register last year “weeded out” some “ineligibles”, but the previous rate of growth in demand has resumed. We are **currently** forecasting that this year’s expenditure will be in the order of **\$950,000**.

In response to this overspend, as the Committee is aware, we have closed the register to new members since Christmas, when it became obvious that the budget was going to be exceeded in the current financial year. As many as 200 people are currently wait-listed for entry to the scheme.

The Committee now needs to decide which groups of people should no longer benefit **from** Total Mobility, and/or what limits should be placed on the amount of assistance available to each participant.

The Committee needs to bear in mind that Total Mobility, while greatly appreciated by those who use it, is not a particularly generous scheme. \$840,000 spread among 4300 participants amounts to less than \$200 worth of **transport** assistance per person.

A significant minority use Total Mobility for daily travel to and from their places of work or education, meaning that the majority receive very limited benefits indeed.

The Committee also needs to bear in mind that demand for Total Mobility remains suppressed. There are undoubtedly still many people who are eligible for and would use Total Mobility, who do not know about it. We have always deliberately avoided advertising the scheme in any way, although equity would suggest that all those entitled to the scheme should be informed of its existence. Every mention of the scheme in the media causes a flurry of enquiries **from** people who consider themselves eligible.

Councillors will appreciate that, because of the basic mechanics of the scheme, it is extremely difficult to “ration” use of the scheme. For example, limiting the number of vouchers requires disability agencies (many of which have no paid employees) or Council officers to make arbitrary decisions about who deserves how much benefit.

Since Christmas we have held three consultations with representatives of users and agencies - two in Wellington and one in Masterton. **We have** decided not to pursue **further** controls on the scheme in the Wairarapa, given that per-capita expenditure remains significantly less than elsewhere in the Region. This is partly because the scheme is less well established in the Wairarapa, and partly because journeys within towns are shorter.

3. Options

Options available to the Committee include:

Tightening the (national) eligibility criteria, which are currently:

Eligible people are those who for reasons of physical, sensory, intellectual or psychological disability, whether congenital, acquired or age-related, satisfy the following criteria:

Cannot unaided (or could not if public passenger transport were available) complete any of the component activities involved in making use of public passenger transport.

The component parts of public transport are defined as:

- *proceeding to the nearest bus stop/railway station*
- *boarding, riding securely and alighting; and*
- *proceeding from the destination stop to the trip end.*

... **The table in the Appendix** shows how many people would be affected by removing particular types of disability from the eligibility criteria.

Phasing Out the Blue Voucher Scheme

Blue vouchers cover the full **taxi** fare, and the Council recovers half the cost from the disability agency concerned. Each agency which uses blue vouchers is allocated a budget for the year, which is shown in the appendix table. The blue scheme caters primarily but not exclusively for people who are incapable of managing their own travel. They are usually either intellectually disabled (the MC's share of the blue

budget is currently \$91,528), or are elderly people in full-time hospital care. Their circumstances are quite different from those who are managing their own affairs and living in their own homes and prevented from using public transport purely because of their physical inability to get to or **from** on or off a bus or train.

Phasing out or eliminating the blue voucher scheme will not “save” an amount equivalent to the blue voucher allocations, because a proportion of blue voucher clients’ are perfectly capable of travelling independently and managing their own travel, but use blue vouchers for a variety of other valid reasons.

Reducing the Rate of Subsidy

The Total Mobility advisory groups considered the possibility of reducing the rate of subsidy to 40% (it is currently 50%).

At the first Wellington meeting this option was supported. Following participants’ consultation with their agencies, however, support for this option reduced significantly. Reducing the subsidy level raises practical issues – to put it bluntly, the mathematical skills of taxi drivers are **often** not highly developed. If dividing a fare in half is sometimes difficult, calculating a **60/40** split would present a considerable challenge (in practice we would supply taxi companies with tables which would calculate the 60% of the fare which the passenger would need to pay).

Rationing the Issuing of Vouchers

The fundamental **difficulty** with this approach is that it is difficult for either the Council or agencies to assess individual’s **level** of need.

Similar problems obviously arise in the case of any form of means-testing. Clearly some participants who are in full time employment do not need the scheme in a strictly financial sense. They participate in the scheme on the same basis as other members of the **workforce** where use of public transport is **also** “subsidised”.

Lowering the Maximum Subsidy Per journey

Currently the maximum subsidy is \$40.00 per journey. Reducing this would **have** a negligible effect on overall expenditure, but would have a significant adverse effect on people making unavoidable long journeys – particularly to and from appointments at Wellington Hospital.

Not Funding Infrastructure

Currently \$50,000 per year is made available to taxi companies by way of grants, for fitting taxi-vans with wheelchair hoists. This amount provides for three new or replacement hoists per year, plus some maintenance expenditure.

Limiting the Use of Total Mobility to and From School

We could disallow the use of Total Mobility for travel to and **from** school, on the grounds that the Ministry of Education should take responsibility for school **transport**. However, we are not extending this argument to the cost of school transport for **non-**disabled children, notwithstanding that the Ministry meets the full cost of school **transport** for rural **children**.

Increasing the Budget

Clearly the issue would be resolved by increasing the budget to cater for the increase in demand for the service. Given that this year's forecast expenditure is \$950,000, the budget for 1999/2000 would need to increase to **\$1,050,000**.

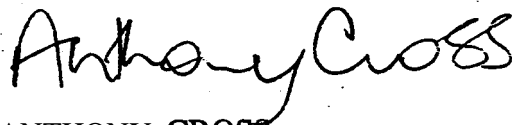
For all the reasons previously discussed, that figure would need to be increased again in subsequent years, in order to avoid the current issue being reconsidered, possibly on an annual basis.

Increasing the budget would mean that the Council was abandoning the stance it took in imposing the budget cap originally. The Committee needs to consider how likely it is that limiting **access** to the scheme will persuade or convince the Government that it should take greater responsibility for transport for the disabled. The road reform proposals suggest that the Government is intransigent on this issue, and intends to remove its current 40% funding through **Transfund** New Zealand.

4. Recommendation

- (1) *That the Council accepts that adjustments to the eligibility criteria for Total Mobility need **further** debate locally and nationally with all relevant government and disability agencies and with other regional councils, in order to achieve a sustainable long term future for the scheme nationally.*
- (2) *That the current Wellington Region Total Mobility scheme be retained and funded for the remainder of the current financial year and for the 1999/2000 financial year, by adjusting the 1998/99 provision for Total Mobility Grants and Subsidies from \$840,000 to \$950,000, with a corresponding impact on the end of year transport reserve position, and by including in the draft 1999/2000 Annual Plan a sum of \$1,050,000 - an increase of \$210,000 over the current draft budget for 1999/2000 budget - with an impact of \$126,000 on the transport rate.*

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Attachment : 1