

## **Information sheet**

### **Total Mobility scheme review**

#### **Phase One changes**

The Ministers of Transport and Disability Issues announced, on 30 August 2005, a three-phase series of changes to the Total Mobility scheme. For those local authorities that implement the specified changes, central government (through Land Transport NZ) will increase its share of funding for the scheme.

Land Transport New Zealand is responsible for ensuring the improvements to the scheme are implemented.

Phase One changes involve a series of 11 specific improvements to the scheme. Local authorities that agree to implement these improvements will be entitled to an increased level of funding from Land Transport NZ, in the form of an increased Financial Assistance Rate (FAR) of 50%. This additional assistance will be subject to local authority scheme funding not falling below budgeted 2005/06 levels. This increase to a 50% FAR will be effective for the current financial year (2005/06).

Phase Two changes, commencing in the 2006/07 financial year, will bring a further increase to a FAR of 60%.

Phase Three will involve assessing what further long-term improvements may be desirable once Phase Two has been achieved.

This Information sheet is intended to outline and clarify the changes associated with Phase One.

The Information sheet includes:

- 1 A summary of Phase One improvements
- 2 Phase One improvements, plus explanatory notes
- 3 Questions and answers arising from Phase One changes.
- 4 Schedule of transport provisions of other government agencies

Signed \_\_\_\_\_

Land Transport NZ  
10 January 2006

## Summary of Phase One improvements

Phase One provides for an increased FAR of 50% effective from 1 July 2005. This increase will apply to all local authorities operating the scheme, who agree to implement specific immediate improvements with regard to the scheme purpose, eligibility and some aspects of entitlement.

This additional assistance will be subject to local authority scheme funding not falling below budgeted 2005/06 levels.

Land Transport NZ is seeking the following Phase One improvements:

- 1 The following Total Mobility Scheme purpose statement is nationally agreed and applied: 'The Total Mobility Scheme is to assist eligible people with impairments to access appropriate transport to enhance their community participation. This assistance is provided in the form of subsidised door-to-door transport services wherever Scheme transport providers operate.'
- 2 The founding central tenet<sup>1</sup> of the Total Mobility Scheme, and the role of local authorities in providing the Scheme, is supported and strengthened.
- 3 The Total Mobility Scheme parameters<sup>2</sup> are clearly defined.
- 4 The following Total Mobility Scheme eligibility criteria are nationally agreed and applied:  
'An eligible person must have an impairment that prevents them from undertaking any one or more of the following five components of a journey unaccompanied, on a bus, train or ferry in a safe and dignified manner:
  - i. Getting to the place from where the transport departs
  - ii. Getting onto the transport
  - iii. Riding securely
  - iv. Getting off the transport
  - v. Getting to the destination.'
- 5 People with impairments who meet the criteria for the Total Mobility Scheme, and are able to use bus, train or ferry services some of the time, but not all of the time, should be eligible for the Scheme (eg people with impairments such as epilepsy or arthritis).
- 6 People who meet the criteria for the Total Mobility Scheme and have an impairment that has lasted, or is expected to last for six months or more, should be eligible for the Scheme.

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<sup>1</sup> The provision of a subsidised transport service to eligible people with impairments is consistent with local government responsibilities to the transport disadvantaged, and part of core business. For further information see page 10, Ministry of Transport final report.

<sup>2</sup> For further information see page 11, Ministry of Transport final report.

- 7 Children with impairments who meet the criteria for the Total Mobility Scheme should be eligible for the Scheme.<sup>3</sup>
- 8 People with impairments who meet the criteria for the Total Mobility Scheme and live in residential care should be eligible for the Scheme.<sup>4</sup>
- 9 The fare subsidy for the Total Mobility Scheme should be nationally consistent and standardised at 50%.
- 10 The Total Mobility Scheme should have no minimum fare threshold.
- 11 There are no restrictions on the purpose of the trip for the Total Mobility Scheme.

## **Phase one improvements with explanatory notes**

### **Purpose**

1. *The following Total Mobility scheme purpose statement will be applied nationally:  
'The Total Mobility scheme is to assist eligible people with impairments to access appropriate transport to enhance their community participation. This assistance is provided in the form of subsidised door-to-door transport services wherever scheme transport providers operate.'*
2. *The founding central tenet of the Total Mobility Scheme, and the role of local authorities in providing the Scheme, is supported and strengthened*

### **Definitions**

'Assist' means: assist through a subsidised transport alternative (contributing towards meeting the transport needs of eligible people).

'Impairments' & 'Disability': The World Health Organisation (WHO) defines impairment as "*any loss or abnormality of psychological, physiological, or anatomical structure or function.*" It also defines disability as "*any restriction or lack (resulting from an impairment) of ability to perform an activity in the manner or within the range considered normal for a human being.*"

The NZ Disability Strategy says: "*Disability is not something individuals have. What individuals have are impairments. They may be physical, sensory, neurological, psychiatric, intellectual or other impairments*".

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<sup>3</sup> It is not intended the Scheme be a substitute for transport services that are the responsibility of other government agencies such as the Ministry of Education which is responsible for all school related travel.

<sup>4</sup> It is not intended that the Scheme should be a substitute for transport services that are the responsibility of the rest home provider, or be used by the rest home to provide transport for organised activities.

'Appropriate transport' means: transport accessible to people with impairments, provided by transport providers contracted by local government for Total Mobility purposes<sup>5</sup>

### **Notes**

The new purpose statement defines the target group for the scheme as people with impairments who are prevented by their impairment from using buses, trains or ferries.

The scheme is founded on the central tenet that people with impairments, unable to use buses, trains or ferries as a result of their disability, should be assisted with a subsidised alternative by local and central government. This reflects the legislative requirement for local and central government to consider the needs of the transport disadvantaged, and has since been further reinforced by the New Zealand Transport Strategy (2002).

The provision of a subsidised transport service to eligible people with impairments is consistent with local government responsibilities to the transport disadvantaged, and part of core business. The scheme is primarily a transport service, and is no more a social, health or disability service than any other type of transport service. Any person would be at risk of social isolation and adverse health outcomes, if they did not have adequate access to appropriate transport. The scheme provides its members through access to transport with the means to participate in their communities in whatever way they choose.

### **3. The Total Mobility Scheme parameters are clearly defined**

#### **Notes**

The following elements clarify the limits of service provision and are already consistent with common practice:

Provision of subsidised transport assistance to people with impairments;

Transport alternative to be provided by way of a subsidised door-to-door transport service;

Limited amount of subsidised transport assistance available;

Limited to areas where Total Mobility Scheme transport providers operate;

Limited to local trips;

Subject to nationally consistent eligibility criteria;

Subject to some regional variation of entitlements to reflect local differences.

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<sup>5</sup> Currently, not all operators that accept Total Mobility vouchers are operating under contract to regional or local councils. In Phase Two, all Total Mobility operators will have to be approved and contracted by a regional or local council to be able to accept Total Mobility fares.

## Eligibility

- 4.** *"An eligible person must have an impairment that prevents them from undertaking any one or more of the following five components of a journey unaccompanied, on a bus, train or ferry in a safe and dignified manner:*
- a. Getting to the place from where the transport departs*
  - b. Getting on to the transport*
  - c. Riding securely*
  - d. Getting off the transport*
  - e. Getting to the destination."*

### **Definitions**

'An eligible person' means: a person eligible to receive subsidised transport assistance via the Total Mobility scheme. Eligibility is determined by the above criteria.

### **Notes**

These new criteria are similar to the current criteria, although they more clearly outline the necessary elements of an 'accessible journey', to assist in determining eligibility. This is consistent with the approach outlined by the Human Rights Commission, which describes the accessible journey as follows: *"...this means that for a person to get from their home to a destination and then home again requires a number of linked steps. All these steps are of equal importance. If one link is broken or inadequate, the whole journey becomes impractical."*

If a person has an impairment that prevents them from being able to undertake any one of the specified components of a journey, they are eligible for Total Mobility. Therefore examples of eligible people would include:

- A person who cannot, because of their impairment, get to the place from where the transport departs. For example, because they cannot physically get to that place, or because they cannot recognise when they have arrived.
- A person who cannot, because of their impairment, get onto, or off, the transport (bus or train or ferry)
- A person who cannot, because of their impairment, ride securely on the transport.
- A person who cannot, because of their impairment, get from the place where they disembark the transport to their actual destination.
- A person who is unable to complete an entire journey unaided
- A person who requires constant assistance from another person for mobility

An impairment may be psychological, psychiatric, physical, neurological, intellectual, sensory or other. It is not the impairment itself that determines eligibility for Total Mobility – rather, it is the effect that the impairment has on the individual’s ability to undertake the components of the journey.

It should be noted that people whose impairment has lasted, or is expected to last, less than six months, are not eligible for the Total Mobility Scheme. This includes, for example, a person with a broken leg who is expected to recover within 6 months. More detail about the minimum duration of impairment is provided under Improvement #4.

Total Mobility may operate in areas which have taxis / Total Mobility transport operators but which do not have buses, trains or ferries. In the case of such areas without a public passenger transport system, eligibility must be determined with reference to hypothetical rather than actual journeys.

Hypothetical equivalents of the component steps of a journey may be:

- 1 Getting to the place from where the transport departs
  - Being able to walk (or equivalent) a short distance without their condition deteriorating
  - Being able to recognise when one has arrived at the transport departure point
- 2 Getting on to the transport
  - Being able to get from the footpath / platform onto the transport. This may involve ascending a few steps.
- 3 Riding securely
  - Being able to travel without their condition deteriorating, and without distress.
  - Being able to communicate intentions to the driver.
  - Being able to handle money.
- 4 Getting off the transport
  - Being able to recognise when one has arrived at the transport stop (e.g. bus stop)
  - Being able to get from the transport onto the footpath / platform. This may involve descending a few steps.
- 5 Getting to the destination
  - Being able to walk (or equivalent) a short distance without their condition deteriorating

In the event that hypothetical journeys are to be involved in assessing eligibility, it is anticipated that an uncomplicated commonsense approach should, in most instances, be able to ascertain eligibility.

The new criteria should take effect immediately for assessing the eligibility of prospective new Total Mobility users. If a prospective Total Mobility user meets the eligibility criteria, they must be recognised and accepted as eligible. However each council has a limited budget available to operate the scheme, and councils are not obliged to necessarily immediately allocate trips / vouchers to all eligible people. Trip allocation is one of the major tools each council has as a budget management mechanism. Policy issues regarding the management of the Total Mobility costs, including trip allocation, will be included in guidelines to be prepared by Land Transport NZ for Phase Two.

People who are currently on the Total Mobility scheme will not have to have their eligibility reassessed as a result of the proposed improvements.

- 5.** *People with impairments who meet the criteria for the Total Mobility scheme, and are able to use bus, train or ferry services some of the time, but not all of the time, should be eligible for the scheme*

**Notes**

This is intended to cover situations where an impairment is fluctuating (e.g. epilepsy), or the impairment is constant and non-fluctuating but is affected by environmental changes (e.g people with a visual impairment that makes independent travel at night very difficult).

This may also include people with impairments (such as Alzheimer's) that restrict travel on buses, trains or ferries to very familiar routes.

The fact that a person may be able to undertake all five journey components some (but not all) of the time does not therefore affect their eligibility. However, this will affect their level of need for Total Mobility trips, which will logically be less than if they were unable to use bus, train or ferry services at any time.

- 6.** *People who meet the criteria for the Total Mobility scheme and have an impairment that has lasted or is expected to last for six months or more should be eligible for the scheme*

**Notes**

This improvement adds a concept of time to the proposed eligibility criteria. Consistent with the definition used by the Ministry of Health, Statistics NZ added a concept of time to the WHO definition of disability for the purposes of the NZ Disability Survey. That is, the disability must have lasted or be expected to last for six months or more. Incorporating this same time duration requirement in the eligibility criteria for the scheme will provide consistency with the above interpretation.

It is important to note that this does not imply a six month stand-down period before a person can become eligible for Total Mobility. This improvement allows for the six month period to be either retrospective or anticipated.

Therefore a person who has an impairment that has already lasted for six months or more may be considered eligible (provided they meet the criteria). Whether the impairment is expected to last another six months is immaterial to the person's eligibility. Examples include:

- a person who had a stroke 12 months ago, who meets the criteria for the scheme, and who is expected to recover sufficiently to be able to use the bus in four months time, is eligible to receive Total Mobility support for the remaining time they cannot undertake the five components of a journey



- a person who had a stroke 12 months ago, who meets the criteria for the scheme, and who is expected to recover sufficiently to be able to use the bus (train or ferry) in two year's time, is similarly eligible to receive Total Mobility support for the remaining time they cannot undertake the five components of a journey
- a person who has an impairment that has not yet lasted for six months is considered eligible (provided they meet the criteria) only if it is anticipated that the impairment will last for six months (including the time already elapsed). For example:
  - a person who had a head injury one month ago, who meets the criteria for the scheme, and who is not expected to recover sufficiently to be able to use the bus within the next five months time, is eligible to receive Total Mobility support
  - a person who had surgery last week, who meets the criteria, and who is expected to recover within six weeks, is not eligible to receive Total Mobility support.

It is expected that the assessment processes will distinguish between permanent and temporary impairments. In the case of temporary impairments, a timeframe for reassessment should be indicated, appropriate to the individual's circumstances. Further information regarding this will be incorporated in the assessors' handbook as part of Phase Two.

A person who has a broken leg or a bad back is unable to use a bus but is expected to have recovered within 6 months is not eligible.

**7.** *Children with impairments who meet the criteria for the Total Mobility scheme should be eligible for the scheme*

**Notes**

The scheme should be available to children to support their independent participation in the community, in ways that are similar to other children in their peer group who do not have impairments. This could include trips to visit friends, or to see a movie. If the child's impairment prevents them from being able to use a bus, train or ferry, and it is reasonable to expect that children in their peer group can independently use such transport, then the child should be eligible for the scheme. Conversely, if the child is so young that other children in that age group would not be reasonably expected to independently use such transport, then the child would not be within the scope of the Total Mobility scheme.

It is not intended that the scheme should be a substitute for transport services that are the responsibility of other government agencies, such as the Ministry of Education, which is responsible for all school related travel. The Ministry of Education provides taxi transport for 'special needs students' which covers transport from home to school and return. In some cases, special education transport assistance may be approved between a respite care facility and school and in some cases, taxi

transport to technology classes may be provided. The Ministry also provides a conveyance allowance, paid to caregivers, based on the distance to the nearest school able to meet their needs.

Ministry of Education provisions are also outlined in the Schedule of transport provisions of other government agencies at the end of this Information Sheet.

- 8.** *People with impairments who meet the criteria for the Total Mobility scheme and live in residential care should be eligible for the scheme*

**Notes**

It is expected that the scheme should be available to people who live in rest homes to support their independent participation in the community. For example, this may be to visit friends or families, or go shopping.

It is not intended the scheme should be a substitute for transport services that are the responsibility of the rest home provider, or be used by the rest home to provide transport for organised activities.

The Ministry of Health advises that rest home providers are responsible for meeting the cost of transport of residents for stipulated health services, including: needs assessment and service co-ordination services; laboratory services; radiological services; dental services; specialist medical services; and podiatry services. While rest home providers must ensure that residents also have access to services such as advocacy services, voluntary organisations (e.g. Stroke Foundation), and socialisation outside the residential facility, they are not responsible for meeting the costs of transport for these.

**Entitlement**

- 9.** *The fare subsidy for the Total Mobility scheme should be nationally consistent and standardised at 50%*

**Notes**

This reflects the current fare subsidy level in most regions.

In the past, some local authorities have occasionally reduced their fare subsidy to a lower level towards the end of the year to manage the budget. This change precludes this as a budget management option. The main budget management mechanisms available to councils are the allocation of trips / vouchers, and control over the maximum fare that can be reimbursed. More detail about this will be provided for Phase Two.

Although increasing the fare subsidy would increase the affordability of the scheme for its members, there is currently insufficient data to ascertain either the optimal subsidy level or the potential impact changes in the subsidy level might have on scheme numbers and costs.

**10.** *The Total Mobility scheme should have no minimum fare threshold*

**Notes**

Any minimum fare penalises scheme members who only make short trips. The one voucher per trip policy will still apply.<sup>6</sup>

**11.** *There are no restrictions on the purpose of the trip for the Total Mobility scheme*

**Notes**

Any limiting of the purpose of allocated trips is inconsistent with the purpose and central tenet of the scheme that is concerned with providing access to subsidised transport, rather than prescribing appropriate or inappropriate destinations.

However it is not intended that the scheme should be a substitute for transport services that should more appropriately be the responsibility of other government agencies, such as those in the health sector or Accident Compensation Corporation (ACC). Please refer to the Schedule of Transport Provisions of Other Government Agencies at the end of this Information Sheet.

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<sup>6</sup> All regions consider a return trip to represent two separate trips.

## Questions and answers

Arising from Phase 1 changes

### **Council Total Mobility budgets and the financial assistance rate**

**Question:** If a council has decreased its Total Mobility budget for 2005/06, does this affect its eligibility to receive the increased financial assistance?

**Answer:** Provided that the council's budget commitment was known and minuted prior to the press release outlining the Minister of Transport's decision regarding improvements to the Total Mobility scheme on 30 August 2005, the council will be eligible to receive the increased FAR. The financial assistance from Land Transport NZ will match the committed council budget for Total Mobility for this financial year, provided that the council implements the 9 improvements that form Phase One.

*Example: if the council's budgeted contribution to Total Mobility in the 2004/05 year was \$60,000 and this was decreased to \$50,000 for the 2005/06 year **prior** to the Ministers announcement, then the financial assistance available from Land Transport NZ for the 2005/06 year would be \$50,000 (50% FAR) - provided that the Phase One improvements had been agreed to by that council, and the council is able to spend the budget.*

**Question:** If a council has increased its Total Mobility budget for 2005/06, does this affect its eligibility to receive the increased FAR?

**Answer:** If the council has increased its budget, this will not affect its eligibility to receive the increased FAR. The financial assistance available from Land Transport NZ will match the committed council budget for Total Mobility for this financial year, provided that the council implements the 9 improvements that form Phase One.

*Example: if the council's budgeted contribution to Total Mobility in the 2004/05 year was \$60,000 and this was increased to \$70,000 for the 2005/06 year, then the financial assistance available from Land Transport NZ for the 2005/06 year would be \$70,000 (50% FAR) - provided that the Phase One improvements had been agreed to by that council.*

### ***Uplifting the increased FAR***

**Question:** If a council moves to Phase One, does all expenditure for that year qualify for the 50% FAR?

**Answer:** Yes, but councils will have to spend their share of the total budget before qualifying for the increase in FAR. For example, let's assume a council sets a total budget of \$100,000 (Council share \$60,000, Land Transport NZ share \$40,000). Once spending reaches \$100,000 the effective FAR will increase to 100% on amounts over \$100,000. This FAR will continue until \$120,000 is spent, at which point the FAR would be set at 50%.

	30 June 06	30 June 06	30 June 06	30 June 06
<b>Total Spent</b>	100K	110K	120K	130K
<b>Regional Council</b>	60K	60K	60K	65K
<b>Land Transport NZ</b>	40K	50K	60K	65K
	<b>40% FAR</b>	<b>45.45% FAR</b>	<b>50% FAR</b>	<b>50% FAR</b>

**Question:** When a council has agreed to the Phase One improvements, what formal processes must it complete before it can uplift the increased FAR?

**Answer:** The council will be required to sign a 'Conditions of Funding Schedule' which will be added to their NLTP agreement. This will form the basis of a written agreement between Land Transport NZ and each regional council.

Once this agreement has been signed, the additional financial assistance may be claimed at any stage during the financial year, providing the councils budgeted share has already been spent.

**Question:** When must a council agree to implement the changes?

**Answer:** In order to qualify for the increased financial assistance in 2005/06, the council decision must be made by 30 June 2006, and the phase One changes implemented by that date.

**Question:** Do the changes need to be incorporated into the council's Regional Passenger Transport Plan?

**Answer:** Yes, this should be done as part of the next review of the plan. But this does not need to be done prior to uplifting the increased FAR.

**Question:** Does agreeing to Phase One obligate a council to move to phase 2?

**Answer:** No. But Land Transport NZ will encourage councils to move to phase 2.

**Question:** Can councils move to Phase One in 2006/07 rather than in 2005/06?

**Answer:** Yes. If a council is unable or unwilling to move to Phase One this year, it can do so at a later time. But the 50% FAR will apply once Phase One has been implemented.

**Question:** Will Land Transport NZ have sufficient funds to meet the increased FAR?

**Answer:** Yes.

### **Wheelchair Hoists**

**Question:** What FAR will apply to new and replacement wheelchair hoists?

**Answer:** The FAR will remain at 60% for replacement hoists and 40% for the purchase of new hoists for the remainder of the 2005/06 financial year. From 2006/07 the FAR for both new and replacement hoists will depend upon which phase of improvements the council has signed up to.

For example: If a council has agreed to phase one conditions the FAR for both new and used hoists will be 50%. If they agree to phase two conditions the FAR will increase to 60%. If they do not sign up to any of the changes the FAR for both new and used hoists will be set at 40%.

## **Schedule of Transport Provisions of Other Government Agencies**

This outline of the provisions of other government agencies to assist with the transport needs of people with impairments is intended to be indicative only. To get accurate up-to-date detailed information please contact the agency concerned.

### **Accident Compensation Corporation (ACC)**

Depending on the discretion of the ACC case manager, assistance may be provided to people whose impairment results from an accident, towards the costs of travel (including taxis) to:

- treatment
- work
- approved courses
- school
- and possibly for general purposes

### **Ministry of Education**

The MOE provides transport assistance for special needs students in two different ways:

A conveyance allowance paid to caregivers, based on the distance to the nearest school able to meet their needs (regardless of whether they choose to attend that school or another).

A taxi service:

The Ministry covers transport from home to school and return. In some cases, special education transport assistance may be approved between a respite care facility and school, up to a maximum of \$100 per calendar month in excess of existing transport costs.

- In some cases, taxi transport to technology classes are provided.
- MOE policy is that school transport assistance is a shared responsibility between the government and the caregiver, rather than a door-to-door service.
- The maximum cost for taxi assistance that a service agent can approve is \$50 per capita per day - anything above this must be approved by National office of the MOE.

### **Ministry of Health**

1. Delivered through NTAP (National Travel Assistance Policy) to enable access to specific specialist rehab in order to maximize a persons independence
2. Applies to publicly funded specialist service on referral from a publicly funded specialist
3. Costs of travel are reimbursed at either the least expensive available transport rate that meets the clients health and disability needs, or re-imburement of \$0.20 per km for private mileage

**Ministry of Social Development**

1. Special Benefit –this can provide transport assistance in the following allowable costs;
  - transport costs due to disability
  - motor Vehicles
  
2. Special Needs Grant – provides non-taxable, one-off recoverable financial assistance to clients to meet immediate needs. A client may be able to assist with Health-related travel costs if they:
  - are referred by a registered medical practitioner to a Secondary Health Service for medical treatment
  - are not receiving assistance for travel or accommodation for that treatment
  - cannot receive a Disability Allowance for that travel or accommodation
  
3. Invalids Benefit – person must be permanently and severely restricted in their capacity for work because of a sickness, injury or disability. These clients are required to see a doctor to provide medical documentation as part of the qualifying criteria for invalids benefit
  - a non-recoverable grant of up to \$200 can be paid to cover the actual and reasonable travel expenses of a client visiting a designated doctor for an initial assessment on application or when having a reassessment
  
4. Disability Allowance – reimburses clients for ongoing regular costs that they incur because they have a disability. Can assist in the following transport costs;
  - ambulance fees and subscriptions
  - transport – personal health
  - transport – disability