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**AUGMENTED ANALYSIS OF
OREGON'S SPECIAL NEED
TRANSPORTATION
PROVIDERS**

by

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SPECIAL NEED TRANSPORTATION PROVIDERS

This analysis extends the work originally provided in the 1988 Oregon Public Transportation Study by the same authors. The intent is to focus attention on a particularly diverse segment of the public transportation community, special need providers (SNT), in an effort to further specify and define their nature and role in the public transportation system. The results of this analysis are intended to assist the Oregon Department of Transportation, Public Transit Division, with its efforts to implement Oregon's public transportation programs and to provide a basis for further specifying additional research needs in this area.

Special Need Transportation providers are a diverse group both in the size and the character of the service they provide. Therefore, using averages and norms to describe them may be misleading as their differences are often more pronounced than their similarities. Some of the extremes in employment, service, budget and other characteristics reported below are a product of this diversity. For example, the largest SNT provider is Tri-Met and its data tends to extend the information ranges reported here. Only the 40 agencies identified in the 1988 Oregon Public Transportation Study as SNT providers are incorporated in the analysis below. However, because each agency did not answer all of the questions, the number of respondents per question will differ.

Because of the overlap in their service territories and the inadequate information base they work with, the aggregate of the 34 SNT providers who reported their service area's population was 4.1 million. These SNT agencies furnished 1.1 million passenger rides while operating a combined total of 4.4 million miles in the 1987-88 fiscal year. The majority (73%) of the miles accrued were for Demand-Response/Dial-a-Ride service which totaled 3.2 million miles. An additional 491,520 miles were provided by volunteer drivers, 379,750 miles were fixed route services, and the taxi subsidy and unscheduled fixed route categories combined for another 320,129 miles.

SNT respondents employ 460 full-time Operations workers. The number of full-time employees employed by SNT agencies averaged 20. SNT operators also employ 156 part-time Operations employees. The average number of part-time employees was 6. The minimum number of part-time employees reported was 1 and the maximum was 41 for a range of 40. There are 93 Administrative employees who work full-time for SNT service respondents. This category had a range of 19, with a minimum of 1 and a maximum of 20. The average number of full-time employees was 3.44. Additionally, there are another 30 workers, an average

of 1.65 per agency, employed part-time in Administrative positions. Because some of these agencies do not consider transportation their primary mission, it is probable that some of the employees reported do not work in transportation related positions, i.e., they are engaged social service providers or in other functional activities.

The local importance of Oregon's special need programs is demonstrated by the number of volunteers who work with the SNT providers. Almost half of the SNT respondents use part-time volunteers to help them provide service and reduce costs. There are 2,120 volunteers working part-time for all providers, for an average of 112. The minimum reported was 1 volunteer and the maximum was 800 volunteers for a range of 799. Five of the SNT providers use 105 full-time volunteers, averaging 21 per agency, to provide service to their clients. Without the help of these men and women, many of the existing programs would be unable to continue to provide services to their clientele population.

While three quarters of the SNT respondents expect an increase in their service miles, only one quarter of the agencies provided specific forecasts. The anticipated increases ranged from 0.5 percent to 100 percent. The average estimated increase was 20 percent. These agencies calculate the increases will occur during the next 1 to 5 years; the norm is just under 2 years.

SNT providers primarily serve senior citizens and individuals who are mobility impaired. Eight of the SNT providers indicated that 16 percent of their ridership was composed of members of the general public. The reported category of general population ridership varied from a minimum of 1 percent to a maximum of 46 percent of their total clients. Twenty-four of the SNT respondents render service to senior citizens. The estimates of what proportion of their clientele seniors represent ranged from a minimum of 1 percent to a maximum of 100 percent. The mean for the senior's proportion of ridership was 73 percent. Handicapped clients are served by 93 percent of the SNT agencies and the estimates on what percentage of their ridership this category represents ranged from 1 percent to 100 percent. Mobility impaired riders averaged 58 percent of the SNT agencies' clients.

Sixty percent of the SNT respondents anticipate an increase in at least one ridership division. Handicapped ridership is projected to increase by 16 of the SNT providers. This category ranged from a minimum expected increase of 1 percent to a maximum of 50 percent, with a mean of 21.5 percent. Senior ridership is forecasted to increase by 12 of the agencies. Their forecasts range from a 2 percent increase to a

100 percent increase and had a mean of 35 percent. Finally, five of these agencies expect their general public ridership to increase an average of 13.6 percent. Thirteen SNT agencies did not respond when asked to explain how these increases were estimated, six reported using transportation development plans, seven used a "crystal ball", two provided multiple responses, and nine used another method to calculate increases.

The number of people who use and benefit from public transportation in Oregon will continue to increase in the future. With 34 of the sample's special transportation providers reporting, ridership for the 1988-89 fiscal year is calculated to be 1.03 million. Only 29 of the agencies provided a forecast for fiscal year 1993-94 but even with fewer agencies responding, the projected total ridership is 1.2 million for an 18 percent increase.

Special transportation respondents used a number of ways to project their ridership. The majority, 22, used their agency's past trends to provide a forecast, seven did not respond to this question, six guessed, two based their response on the number of residents in their service district, two based their response on information furnished to them by the actual service provider, and one based its projections on budgetary limitations.

Twenty-two of the SNT respondents do not feel they are meeting the transit needs of the mobility impaired and seniors in their service areas, nine believe they are meeting their needs, five are unsure, and four did not respond to this question. In order to satisfy the unmet transportation needs of the elderly and/or handicapped in their service area, SNT providers reported aggregate monetary needs of \$78,360 for new or expanded routes, \$454,234 to provide extended service hours, \$1.1 million to purchase additional vehicles, and \$400,000 for a user-side subsidy in Tri-Met's LIFT Program.

The SNT respondents' anticipated population changes and the resources they used to estimate these changes in their service areas present a diverse picture. Twenty-six believe their population will increase by an average of 13 percent. Six report their population is expected to remain the same, four did not know, three did not respond, and one reported their population is expected to decrease. Two agencies used Council of Governments studies as the basis of their forecast, five used the Center for Population Research and Census, four used their county planning department, three used more than one of the above sources, 11 did not respond to this question, and 15 marked the "other" category. General growth will be responsible for the

population increases for 16 SNT providers, commercial retail growth for one, several factors for two, and 21 did not indicate which factors explain the anticipated changes in their populations.

Door-to-door service for seniors and mobility impaired riders is provided by 85 percent (34) of the special transportation respondents and three others are considering adding this service in the future. Twenty-two of the SNT respondents which provide this service require clients to make reservations in advance and 13 do not have clients reserve rides. Requirements for reservations ranged from 2 hours to 72 hours with the most common reservation requirement reported 24 hours.

Although the addition of the Special Transportation Fund's one cent cigarette tax has encouraged the provision of service to the state's elderly and mobility impaired population, the current level of funding is not sufficient to satisfy the existing need. Of the 28 SNT providers who receive Special Transportation Fund money, 23 feel it is not enough, one was unsure, and four believe it is enough to meet the needs of their agency.

In an effort to identify the principal revenue sources for special needs transportation providers, their reported revenue sources were analyzed. Because the sample size is too small (40 responses from the 129 SNT providers contacted) and because the participants may not represent an accurate cross-section of providers, these results cannot be generalized accurately as representative of Oregon's SNT providers revenue resources. Of the 40 SNT providers who responded to the survey, 29 provided at least one year of the requested revenue information. Due to the presence of Tri-Met's principal contractors, these 29 SNT providers receive approximately 66 percent of their revenue from local funding sources. Another 21 percent is obtained from the state, 10 percent from the federal government and just over 2 percent from farebox collections.

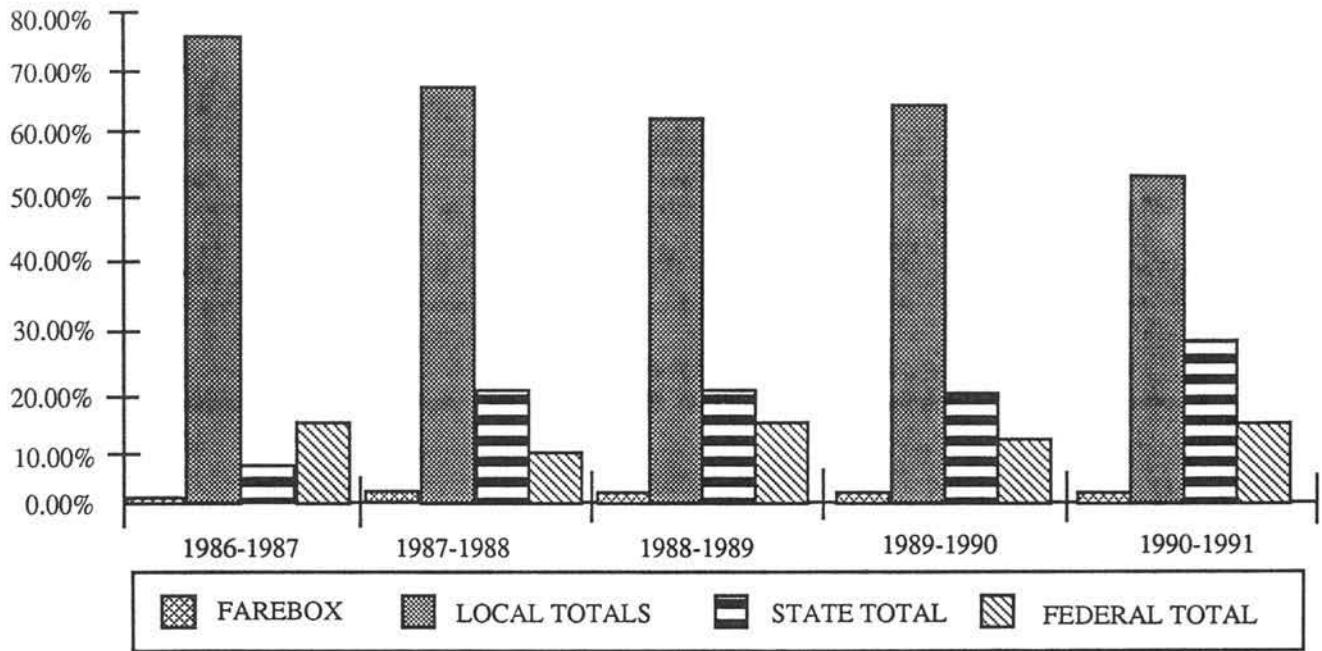


Figure 1. Special Needs Transportation Revenue Sources

In an effort to determine if funding sources were similar for all SNT providers, the agencies which participated in the 1988 Oregon Public Transportation Study were divided into four categories based on the average size of their reported annual transportation expenditures. While the data provided general trends, the sample size is too small for reliable conclusions. What is apparent is the breadth of revenue sources which are tapped by the SNT providers. The categories of agencies were:

- providers whose average revenue size was less than \$50,000 annually;
- those whose mean revenue size was greater than \$50,000;
- Tri-Met's prime contractors; and,
- Tri-Met's LIFT program.

Tri-Met's LIFT Program was examined individually because its average revenues equal \$4.4 million, far larger than the other SNT providers. In addition, Tri-Met's principal contractors were isolated from the other SNT providers because their only reported sources of revenue were Tri-Met and farebox collections.

For fiscal year 1989-90, the LIFT program forecasted revenues equal to \$4,327,940. Almost half of the projected monies will come from local sources. Just over one third of this is from their general fund, a tenth is from county mental health, and a small amount is from other sources. It is anticipated the state will provide approximately one third of their capital. Of this portion, the Special Transportation Fund will provide

about 25 percent and in-lieu of payroll will provide approximately 10 percent. Federal grants are expected to provide 16 percent of the LIFT programs total revenues. The majority of this money will come from the UMTA Section 9 fund. It is calculated farebox collections will provide less than 2 percent of their capital. Within the 1989-90 fiscal year, the LIFT program will distribute about \$1.5 million to Special Mobility Services in Multnomah County, \$500,000 to Buck Medical Services in Clackamas County, and \$500,000 to Broadway Transportation Company in Washington County.

In the fall of 1989, Tri-Met plans to release individual Requests for Proposals for the maintenance and service contracts for Multnomah, Clackamas, and Washington counties, and as a result, the prime contractors in these counties may change. Tri-Met's goal is to contract for a central dispatch service to provide better coordination of service. They foresee this central dispatch unit as capable of writing schedules and communicating via a computer network to the drivers' stations (one per county). The dispatch unit, will also have radio communication with the drivers and will coordinate their schedules so that when a driver drops a client off at his or her destination, s/he can shuttle other clients during the waiting period, using the vehicle drivers' time more efficiently and increasing the service provided to the tri-county area.

There were 19 agencies whose annual transportation expenditure totals average less than \$50,000. However, two of these providers have annual revenues exceeding \$400,000 so they were deleted from the analysis. With only 6 of the remaining 17 agencies reporting their revenues for 1989-90, their combined forecasted revenue total equals \$76,687. The reported revenue amount for these agencies ranged in size from \$3,000 to \$23,816. For these providers, local revenue sources provided an average of almost 22 percent of their funds, 11 percent of this was from county mental health and the remaining amount was supplied by five other local resources. State sources provided just over half of the total, all of which was provided by STF. Federal sources provided 17 percent through Community Services Block grants and UMTA Section 18. Farebox collection provides 3.4 percent of their revenues. These percentages are expected to hold relatively stable, but state revenues are predicted to decline and local revenues are expected to increase to compensate.

Nine agencies reported transportation expenditure totals that, when averaged, ranged from \$50,092 to \$193,253. There were 13 SNT providers who reported at least one year's revenue sources. With 9 agencies providing projected revenues for the 1989-90 fiscal year, their aggregate total equals \$954,430. Local revenue sources combined to provide almost 65 percent of the expected funds, with county mental health furnishing

over 25 percent of the expected receipts, fund raising accounting for almost 15 percent, and six other local sources providing the remaining 24 percent. State sources comprise 16.7 percent of aggregate reported by this group, of which 14.6 percent is dispensed by the Special Transportation Fund. It is anticipated that 5 different federal funding agencies will provide 13.6 percent of the total funds for these providers.

Currently, Tri-Met's principal contractors are Special Mobility Services, Broadway Transportation Company, and Buck Medical Services. These contracts are awarded on the basis of competitive bids. This fall new contracts will be awarded for service beginning in fiscal year 1990-91. Consequently, neither Broadway Transportation or Special Mobility Services provided revenue information beyond 1989-90. These three providers furnished only the figures for their contracts with Tri-Met, 98.3 percent of their total, and farebox collections, less than 2 percent of their revenue sum. The total FY 1989-90 revenue amount reported for these agencies was \$2,657,776.

Twenty SNT providers reported their capital needs for at least one fiscal year between 1988-89 and 1993-94. These requirements ranged from a low of \$156,979 in FY 1988-89 to an anticipated high of \$2.9 million in FY 1990-91. The table below presents the reported capital needs for each fiscal year.

SNT PROVIDERS' REPORTED CAPITAL NEEDS						
	FY 1988-89	FY 1989-90	FY 1990-91	FY 1991-92	FY 1992-93	FY 1993-94
Small Buses:	\$68,992	\$91,000	\$15,000	\$128,000	\$16,000	\$45,000
Vans/ Paratransit Vehicles:	\$80,500	\$800,500	\$722,100	\$775,800	\$839,000	\$813,000
Communi- cations Equipment:	\$2,000		\$10,500		\$500	
Stations/ Maintenance Facilities:				\$2,000,000		
Maintenance Equipment:	\$1,487					
Other:	\$4,000	\$4,000	\$3,500	\$3,000	\$3,500	
Total:	\$156,979	\$895,500	\$751,100	\$2,900,000	\$859,000	\$858,000

Twenty-nine of the 40 special needs transportation providers described their current transportation fleet, including the size of the vehicles and their age. The following table cites the agencies who reported and details the number and average age of their vehicles.

AGENCY NAME	VANS	AVG AGE	SM BUS	AVG AGE	TOTAL VEHICLES
BUCK MEDICAL SERVICES:			16	4.75	16
DISTRICT 1 AREA AGENCY ON AGING:	5	3.8	2	4	7
TREASURE VALLEY OPPORTUNITIES:	4	5			4
OPPORTUNITY FOUNDATION OF CENTRAL OREGON:	5	6	1	5	6
BENTON CO. MENTAL HEALTH:	1	15			1
OPPORTUNITY CENTER, INC.:	3	7	1	6	4
STEP FORWARD ACTIVITIES, INC.:	3	6.67			3
SENIORS OF MOSIER VALLEY:	1	10			1
BROADWAY TRANSPORTATION:	19	4.7			19
MID-COLUMBIA COMMUNITY ACTION COUNCIL:	1	10			1
CHEHALEM VALLEY SENIOR CITIZENS:	2	6	2	4	4
RESIDENTIAL ASSISTANCE PROGRAM:	3	9.33			3
SENIOR WHEELS:	3	5			3
ALBERTINA KERR CENTERS FOR CHILDREN:	12	5.9			12
POLK SR. TRANSPORTATION DISTRICT:	3	6.67			3
POLK HABILITATION ENTERPRISES:	3	4			3
JOSEPHINE CO. MENTAL HEALTH:	2	1			2
FRIENDLY HOUSE, INC.:	2	8			2
LOAVES & FISHES CENTER, INC.:	3	7	5	3.4	8
SHERMAN CO. SENIOR BUS:	1	9			1

AGENCY NAME	VANS	AVG AGE	SM BUS	AVG AGE	TOTAL VEHICLES
COOS COUNTY VETERANS SERVICE:	4	5.75			4
CENTRAL OREGON COUNCIL ON AGING:	6	6.5			6
SR. CITIZENS SHARE BUS:	1	8			1
SPECIAL NEEDS TRANSPORTATION (TRI-MET):	13	8	75	4	88
MARIE MILLS CENTER, INC.:	1	4			1
CONFEDERATED TRIBES OF WARM SPRINGS:	1	5			1
MIDCOAST ENTERPRISES, INC.:	2	9	1	9	3
PEOPLE TO PEOPLE HANDICAPPED GROUP:			1	30	1
JOSEPHINE COUNTY VETERANS SERVICES:	1	1	1		
TOTALS/AVERAGES	105	5.91	104	2.34	209

Special Needs Transportation providers are an unusually disparate group. Many of the agencies contacted for the 1988 Oregon Public Transportation Study declined to participate because they did not identify themselves as transportation providers, others who initially felt the same way agreed to return completed questionnaires, while still other providers do define themselves as primarily transportation agencies. The need for transportation service for the elderly and mobility impaired populations is evident from the increase in the number of providers which has occurred during the last two years. When the 1986 Oregon Transit Finance Study was published, there were only 40 SNT providers identified compared with the 129 contacted for this study. Additional work is needed to identify the special needs transportation providers and encourage them to furnish information about their programs and clients so an accurate picture of the needs of the elderly and mobility impaired citizens of Oregon can be defined.

REVENUE SOURCES FOR SNT PROVIDERS					
	N=19	N=24	N=27	N=19	N=16
	1986-87	1987-88	1988-89	1989-90	1990-91
FAREBOX	1.87%	2.02%	2.08%	2.14%	2.53%

LOCAL REVENUES					
GENERAL FUND	34.68%	25.50%	17.08%	17.85%	25.58%
DEDICATED TAX	0.51%	0.45%	0.40%	0.43%	0.00%
FUND RAISING	0.23%	0.23%	2.17%	1.72%	2.16%
COUNTY MENTAL HEALTH	8.57%	8.71%	9.93%	9.12%	12.92%
UNRESTRICTED DONATIONS	0.39%	0.61%	0.59%	0.51%	0.63%
LOCAL SERVICE CLUBS	0.02%	0.13%	0.01%	0.00%	0.00%
FOUNDATIONS	0.05%	0.02%	0.07%	0.07%	0.10%
UNITED WAY	0.46%	0.46%	0.43%	0.44%	0.54%
CHARTER	0.51%	0.32%	0.40%	2.32%	0.74%
OTHER	32.14%	32.93%	32.56%	34.47%	13.24%
LOCAL TOTALS	77.58%	69.36%	63.65%	66.94%	55.92%

STATE REVENUES					
IN-LIEU	0.00%	0.00%	5.21%	5.37%	7.41%
STF	5.90%	20.75%	15.84%	14.89%	19.44%
STRIPPER WELL	0.34%	0.00%	0.00%	0.00%	0.00%
VOC REHAB	0.16%	0.14%	0.11%	0.12%	0.17%
OTHER DHR	0.00%	0.00%	0.00%	0.00%	0.00%
OTHER	0.29%	0.23%	0.32%	0.23%	0.32%
STATE TOTAL	6.69%	21.11%	21.49%	20.61%	27.33%

FEDERAL REVENUES					
UMTA 9	9.17%	0.00%	6.10%	6.29%	8.67%
UMTA 3	0.00%	0.00%	0.00%	0.00%	1.76%
UMTA 18	1.62%	1.49%	2.36%	0.96%	0.20%
UMTA 16B2	0.00%	2.45%	1.30%	0.67%	0.20%
OLDER AMER	2.12%	2.43%	1.94%	1.95%	2.77%
ADULT & FAMILY SVCS	0.68%	0.88%	0.77%	0.22%	0.31%
CSBG	0.00%	0.00%	0.07%	0.12%	0.15%
OTHER	0.27%	0.26%	0.23%	0.11%	0.15%
FEDERAL TOTAL	13.86%	7.51%	12.77%	10.31%	14.22%

When the data were analyzed, it was discovered that some duplicate reporting of revenues had occurred which involved Tri-Met's LIFT program and one of its prime contracted providers, Buck Medical Services. It was also determined that Special Mobility Services and Broadway Transportation Company, Tri-Met's other two primary contractors, had not provided revenue information. Tri-Met, Buck Medical Services, and Special Mobility Services were contacted to ascertain the correct revenue amounts for these agencies and the information was added to the survey's data base.

IMPLICATIONS

The findings reported here must be understood in the general context of limitations inherent in the 1988 Oregon Public Transportation Study. The response rate while acceptable did not capture the all SNT providers. Hence, we are not able to argue that our findings are truly representative of the entire population of SNT organizations. We recognize that the very diversity that characterizes this public transportation provider group demands a further attempt to understand them while at the same time frustrating attempts to apply generalities to these agencies. Clearly, many of the recipients of transportation assistance in this category think of themselves first as social service providers and only secondarily as transportation agencies.

A further complexity is the ambiguous dividing line between this group and rural transportation agencies. Many of the agencies classified here as special needs providers are in reality rural transportation

agencies as well. This only adds further complexity to the process of understanding and serving this transportation arena.

The Public Transit Division requires clear and consistent information about this area of public transportation in order to target funds effectively and equitably. In the face of poor information there is no guarantee that the most deserving receive the available assistance. More importantly, the collective contribution to state goals is problematic. The primary approach to overcoming these deficiencies is coordination and information exchange among agencies. With over one hundred SNT agencies, Oregon requires a great deal of collaboration among diverse agencies to make this goal a success.

APPENDICES

SNT PROVIDER LIST BY SIZE

SNT Providers with Less Than \$50,000 Revenue

Polk Habilitation Enterprises
Josephine Co. Mental Health
Sunshine Industries Unlimited, Inc.
Sherman Co. Senior Bus, Inc
Sweet Home Senior Center
Step Forward Activities, Inc.
Seniors of Mosier Valley, Inc.
Residential Assistance Program
Confederated Tribes of Warm Springs
Wallowa Co. Interfaith Caregivers
People to People Handicapped Group
Josephine Co.
Klamath Mental Health Center*
Friendly House, Inc*
Community Action Volunteer Services*
OR Dist 4, Council of Governments*
Janus House - Benton Co. Mental Health Association*

SNT Providers with More Than \$50,000 Revenue

Senior Companion Program for Lincoln Co
Area Agency on Aging
Treasure Valley Opportunities
Opportunity Foundation of Central Oregon
Senior Wheels, Inc , Cottage Grove
Albertina Kerr Centers for Children
Polk Senior Transportation District
Curry County Public Transit System
DHR Volunteer Services Program
Opportunity Center, Inc.
Central Oregon Council on Aging
Loaves & Fishes Centers, Inc
Chehalem Valley Senior Citizens Council

TRI-MET'S PRIME CONTRACTORS

Buck Medical Services
Broadway Transportation Company
Special Mobility Services

TRI-MET'S LIFT PROGRAM

*Did not provide revenue information