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Dear Chrissy

RE: Total Mobility scheme - Phase Two improvements

The second phase of improvements to the Total Mobility scheme involves a series of 19 specific recommendations. Introducing these changes will bring a further funding increase for councils to a 60% financial assistance rate. As with Phase One, this increased assistance will be subject to local authority scheme funding not falling below budgeted 2005/06 levels. The financial assistance rate for Total Mobility administration will also increase to 60% upon sign-up to Phase Two.

Improvements 3,6,9 and 10 are not discussed in detail in this information sheet as they are being reviewed further by the Ministry of Transport following feedback from councils at the TM workshops held at the end of 2006. The Ministry is working on a paper which will outline potential options for addressing these improvements and will distribute this for consultation separately.

The attached information sheet is intended to outline and clarify the changes associated with Phase Two improvements in regards to entitlement, assessment (excluding 3, 6, 9 and 10) and transport operators. It includes the following information:

- 1 A list of all Phase Two improvements
- 2 Phase Two improvements, plus explanatory notes (excluding 3,6,9 & 10)
- 3 Draft template for assessment contract (Appendix A)
- 4 Draft application form (Appendix B)
- 5 Draft handbook for assessment facilitators (Appendix C)
- 6 Draft template and accompanying guidelines for transport operator contracts (Appendix D).

The flat payment to transport operators for TM wheelchair hoist trips has been separated from other Phase Two improvements to enable implementation by July 1 2007. Details on this

improvement have been included in this document to provide further information on the reasoning behind the payment and to highlight the changes to transport operator contracts which will be required before this payment may be claimed. A General Circular will follow shortly which will outline the processes for administering and claiming the payment from Land Transport NZ.

These draft guidelines for Phase Two provide a starting point only. Your feedback is vital to ensuring we get the best set of resources possible to assist councils, assessment facilitators and users of the Total Mobility scheme. If you could review each document and feed any comments back to me by Friday 22 June 2007, preferably via track changes on each document we would greatly appreciate it.

Kind regards

Caroline Stone
Policy Advisor

Information sheet

Summary of Phase Two improvements

Land Transport NZ is seeking the following Phase Two improvements (the improvements highlighted in gray have been excluded from this information sheet pending the Ministry of Transport's review):

Entitlement

- 1 Local authorities determine maximum subsidised fares for the Total Mobility Scheme in negotiation with Land Transport NZ, taking into account the NZ Travel Survey, and review them annually.
- 2 Town boundary travel restrictions for the Total Mobility Scheme be removed and replaced with a maximum subsidised fare.

Assessment services

- 3 The number of allocated subsidised trips for the Total Mobility Scheme takes into account the self-assessed needs of individual Scheme members, be adjusted by local authorities to manage their budgets, and negotiated with Land Transport NZ.
- 4 Land Transport NZ develops guidelines for contracts between local authorities and assessment agencies to ensure high quality and consistent assessments.
- 5 Local authorities enter into contracts with assessment agencies, aligned with the guidelines produced by Land Transport NZ.
- 6 The assessment process assists Total Mobility Scheme members estimate how many trips they would use (self assessed needs). This information will be provided to local authorities to assist them in determining the appropriate number of allocated subsidised trips.
- 7 A handbook, including best practice guidelines, should be developed and published by Land Transport NZ in conjunction with local authorities, to help assessors in consistently applying the eligibility criteria.
- 8 Appropriate training is provided to assessors to assist in the consistent application of the eligibility criteria.
- 9 Local authorities should make a financial contribution towards the cost of assessments and administration undertaken by assessment agencies.
- 10 Potential members of the Total Mobility Scheme are not required to become financial members of an assessment agency in order to have an assessment for the Scheme,

although they may be asked to pay an application fee. The appropriate amount of any such fee should be negotiated between Land Transport NZ, local authorities and assessment agencies.

- 11 Potential members of the Total Mobility Scheme have the option to be assessed by a voluntary disability sector agency in every region.

Administration

- 12 Land Transport NZ encourages local authorities to establish systems for data collection, monitoring and evaluation.
- 13 Land Transport NZ encourages local authorities to improve their administration systems for the allocation and redemption of trip entitlement vouchers.

Transport operators

- 14 Land Transport NZ develops guidelines for contracts between local authorities and Total Mobility Scheme transport operators to ensure high quality and adequate service levels, including the provision of wheelchair accessible taxis within the fleets.
- 15 Local authorities enter into contracts with transport operators, aligned with the guidelines produced by Land Transport NZ.
- 16 Land Transport NZ encourages adequate provision of wheelchair accessible taxis by providing a flat payment (in addition to the fare) to the transport operator for each trip taken by a Total Mobility Scheme member using a wheelchair hoist.
- 17 Land Transport NZ investigates the establishment of an appropriate regime to ensure that wheelchair hoists meet acceptable safety standards.
- 18 Local authorities are encouraged to investigate the possibility of contracting taxi services operating in areas that are not currently covered by the Total Mobility Scheme, to provide a Scheme service.
- 19 The possibility of other types of transport providers participating in the Total Mobility Scheme is investigated.

Phase Two improvements with explanatory notes

Entitlement

1. *Local authorities determine maximum subsidised fares for the Total Mobility scheme in negotiation with Land Transport NZ, taking into account the NZ Travel Survey¹, and review them annually.*

Notes:

In order for the maximum fares to reflect the purpose of the scheme, it is important that they are established at a level that is adequate and appropriate for each town/region operating a Total Mobility scheme.

The data from the New Zealand Travel Survey 1997/98 was used to calculate a range of possible maximum subsidised fares for each region taking into account the average trip distances undertaken by householders in specific towns and regions. The outcome of these fare calculations showed that most regions already have a maximum fare which allows TM users to travel these average distances. Therefore, no change is required at this point in time to your current maximum fare.

Each regions maximum subsidised fare should be periodically reviewed to ensure that these fares are taking into account increases in tariff rates, fuel prices etc. At the Total Mobility workshops held at the end of 2006, it was proposed that these fares be reviewed 3 yearly in alignment with the LTCCP. Feedback on this proposal would be appreciated.

2. *Town boundary travel restrictions for the Total Mobility Scheme be removed and replaced with a maximum subsidised fare.*

Notes:

Members of the Total Mobility scheme should not be confined to travel within town boundaries. This rule disadvantages those who live just beyond town boundaries, or need to travel to a destination that is just outside town boundaries. It may also prevent members from being able to engage in activities in nearby towns where many key services and activities may be located. This is a particularly big issue for those living in small provincial or country towns.

Under Phase Two, town boundary travel restrictions must be removed and subsidised travel may be limited by the use of a maximum subsidised fare only.

¹ For information on the New Zealand Travel Survey: <http://www.transport.govt.nz/about-survey/>

Assessment services

4. *Land Transport NZ develop guidelines for contracts between local authorities and assessment agencies to ensure high quality and consistent assessments AND*
5. *Local authorities enter into contracts with assessment agencies, aligned with the guidelines produced by Land Transport NZ.*

Notes:

Councils that sign up to Phase Two will be required to hold a contract with each transport operator that provides Total Mobility services in its region. A contract template has been drafted by Land Transport NZ and is attached as Appendix C. Those councils that already have contracts in place will be required to ensure that all clauses in the template have been covered off in those contracts.

7. *A handbook, including best practice guidelines, should be developed and published by Land Transport NZ in conjunction with local authorities, to help assessors in consistently applying the eligibility criteria*

Notes:

The handbook for assessment facilitators is attached as Appendix A. This includes information about the two key elements of the assessment facilitator's role, namely working with the prospective Total Mobility client to ascertain eligibility for Total Mobility and to establish the number of Total Mobility assisted trips required. While the Phase Two improvement relating to the allocation of subsidised trips (improvement 6) is amongst those set aside for further review, it appears that councils are generally comfortable with the principle of basing Total Mobility allocations on the needs of the clients. Therefore the component of the handbook which relates to working out the number of trips required is included for the benefit of councils which might find this useful.

The handbook is intended to be of assistance to assessment facilitators, in the performance of their role, and to councils, to ensure consistent application of the eligibility criteria for Total Mobility. The handbook is also intended as a training resource to be used when training assessment facilitators in their role.

Feedback re the handbook would be most welcome, especially any comments relating to what aspects of the handbook are useful, what could be improved, and anything else you would like to see covered.

A draft application form has been compiled using the existing application forms used by councils and agencies around the country. From these, a best practice Total Mobility application form has been created (Appendix B). The questions have remained relatively

unchanged, but an additional section has been included under 'Allocation Request' where TM scheme applicants will be asked how many vouchers they would like to request per month.

NB: the improvements specifically related to self-assessed needs are being reviewed by the Ministry of Transport. Therefore, the exact practices around the allocation of Total Mobility trips may be subject to change once the outcome of the review is known.

8. *Appropriate training is provided to assessors to assist in the consistent application of the eligibility criteria.*

Notes:

The handbook for assessment facilitators is designed to act as a training tool for existing and new assessors. Training would be required for existing assessors on a periodic basis (as outlined in the councils contract with assessment agencies) and new assessors would be required to attend a training session prior to conducting TM assessments.

It is up to each council to decide how to run these training sessions and who conducts them. For example, a council may wish to have the TM coordinator providing the training to TM assessors, or use an experienced assessor from one of the agencies as the TM trainer for the region.

The cost of providing the training will be funded at 60% FAR, claimed through the TM administration budget.

11. *Potential members of the Total Mobility Scheme have the option to be assessed by an independent² disability sector agency/assessor in every region.*

Notes:

Where GP's are the most prevalent assessment facilitators, there must be at least one independent disability sector agency/assessment facilitator in each region that can provide a TM assessment for potential scheme members not wishing to go to a doctor. This may be in the form of a recognised disability sector agency, or it may be an independent assessor employed by the council to undertake TM assessments.

² The word 'voluntary' has been replaced by 'independent' following feedback from councils during the 2006 phase two workshops.

Administration

12. *Land Transport NZ encourages local authorities to establish systems for data collection, monitoring and evaluation.*

Notes:

Land Transport NZ is encouraging local authorities to establish systems for data collection by establishing a sector-wide data gathering system. We expect to include Total Mobility information in this system when it is up and running. The data required for monitoring and evaluation purposes could include information relating to the total number of Total Mobility trips undertaken, the number of wheelchair trips, number of members, average distances travelled etc.

13. *Land Transport NZ encourages local authorities to improve their administration systems for the allocation and redemption of trip entitlement vouchers.*

Notes:

Information will be sent regarding funding of administration systems once the details of the data gathering system have been finalised.

Transport operators

14. *Land Transport NZ develops guidelines for contracts between local authorities and Total Mobility Scheme transport operators to ensure high quality and adequate service levels, including the provision of wheelchair accessible taxis within the fleets; AND*
15. *Local authorities enter into contracts with transport operators, aligned with the guidelines produced by Land Transport NZ.*

Councils that sign up to Phase Two will be required to hold a contract with each transport operator that provides Total Mobility services in its region. A contract template has been drafted by Land Transport NZ and is attached as Appendix D along with guidelines for putting the contracts together. Those councils that already have contracts in place will be required to ensure that all clauses in the template have been covered off in those contracts. Councils may add additional clauses specific to their region such as the rules around swipe card usage, invoicing procedures etc.

This template has been compiled using copies of existing contracts given to us at the meetings held with all councils throughout February and March 2006. Therefore, most of the clauses are already covered in existing contracts. The primary changes required that relate specifically to Phase Two are:

- The maximum fare for which the subsidy is available must be stated in each contract;

- All wheelchair hoists must be inspected and certified as safe for use by a Low Volume Vehicle certified engineer at least every 12 months as part of its Certificate of Fitness check;
- The TM tariff must not be higher than the standard tariff rate for an equivalent non-TM trip;
- A flat payment will be paid to transport operators for each TM hoist trip, provided that:
 - a. the meter does not operate while passengers are being loaded/unloaded from the vehicle; and
 - b. the tariff rate for hoist trips must be equivalent to the appropriate non-hoist tariff.

16. *Land Transport NZ encourages adequate provision of wheelchair accessible taxis by providing a flat payment (in addition to the fare) to the transport operator for each trip taken by a Total Mobility Scheme member using a wheelchair hoist.*

The introduction of a flat rate payment for wheelchair hoist operators is intended to increase the provision of hoist services in each region, to increase the availability of such services to TM users at peak times, and to remove the current inequitable fare structure for hoist passengers.

Wheelchair accessible vehicles tend to be a less attractive capital investment when compared to other taxis due to higher capital and operating costs and a high level of dead mileage resulting in loss of revenue compared to standard taxis. Wheelchair hoist operators may also suffer a loss of patronage as some people are averse to riding in a vehicle that has been fitted with a hoist mechanism. Currently, many operators are charging a higher tariff rate for TM hoist trips than for standard TM taxi trips, and are leaving the meter running while loading and unloading passengers.

As part of Phase Two, contracts will require transport operators to charge equivalent tariff rates for both hoist and non-hoist trips. They will not be able to charge clients for loading/unloading time, or charge a higher tariff rate for hoist trips (this is to be stipulated in the contracts held between operators and the Council).

To compensate for these changes, Land Transport NZ will fully fund a \$10.00 (GST incl.) flat payment (in addition to the fare) to hoist operators for each trip undertaken by a TM passenger requiring the use of a wheelchair hoist³. This is intended to offset some of the additional costs associated with operating a wheelchair hoist vehicle, and to make hoist tariff rates equitable to standard taxi tariff rates.

³ The payment also applies to TM trips requiring the use of a wheelchair ramp

As Land Transport NZ cannot fund transport operators directly, the assistance of councils is required to administer the payment. In order to do this, councils will need to be able to distinguish between a hoist and non-hoist trip before Land Transport NZ can be able to reimburse the flat payment to the region.

17. *Land Transport NZ investigates the establishment of an appropriate regime to ensure that wheelchair hoists meet acceptable safety standards.*

Promoting safe land transport is one of Land Transport NZ statutory responsibilities. Currently, the requirement for regular hoist safety checks is included in the Certificate of Fitness Guide. However, the only requirement is that where "a Passenger Service Vehicle is in service and is already fitted with wheelchair hoists and/or restraint systems, the AVIC should only check that these are in sound condition and good working order". This Certificate of Fitness Guide has been reviewed by Land Transport NZ and it will soon be replaced with a Vehicle Inspection Requirements Manual which will include requirements for the in-service inspection of the correct operation of a wheelchair hoist, its fitting to the vehicle, the condition of its components and extra requirements depending on its design and construction.

A clause has been added to the operator contract template which states that any hoist fitted in a TM contracted van must be inspected and certified as safe for use by a Low Volume Vehicle engineer at least every 12 months as part of its Certificate of Fitness check.

18. *Local authorities are encouraged to investigate the possibility of contracting taxi services operating in areas that are not currently covered by the Total Mobility Scheme, to provide a scheme service.*

In some regions there may be taxis operating in areas where there is no Total Mobility scheme. The Total Mobility report has recognised the potential for these taxis to be contracted to provide TM services in these areas even though such areas may not be rated for TM and may not provide other bus, train or ferry services.

Extending the scheme into these areas should be investigated by the Council if there is a current unmet need. This improvement does not mean that the Council must ensure there is a Total Mobility service operating in every rural area in its region. However, if a taxi company is currently operating in an area where there is no TM scheme and the operator expresses an interest in providing one, then the Council should be open to contracting its services for Total Mobility. Similarly a Council may initiate the extension of the TM scheme to areas where there is both an unmet need and a potential operator.

19. *The possibility of other types of transport providers participating in the Total Mobility scheme is investigated.*

Notes:

Total Mobility services are currently provided mostly by taxis. The Ministry of Transport review concluded that this situation is not necessarily the optimal set up. Potential exists for other transport operators to participate in the scheme, as they already do in some regions. For instance, transport services operated by community trusts and other operators that operate wheelchair accessible vehicles.

As with other transport services, operators will be required to meet legal licensing requirements and have the appropriate contracts with local authorities.