Aging-In-Place: Regional Transit Services and Senior Mobility Issues

A Report to the AARP

Prepared by:

George Mason University
School of Public Policy
Transportation Policy, Operations, and Logistics

Spring 2009
# Table of Contents

EXECUTIVE SUMMARY ................................................................. 1  
INTRODUCTION ................................................................................. 4  
  Setting the Stage ........................................................................ 5  
  Scope of Work ............................................................................ 6  
  Methodology ................................................................................ 6  
  The Role of the Federal Government ........................................... 7  
CASE STUDY I: DETROIT, MI ............................................................. 9  
  Regional Context .......................................................................... 10  
  Regional Transit Agencies ........................................................... 10  
    Ann Arbor Transportation Authority ....................................... 10  
    Suburban Mobility Authority for Regional Transit .................. 13  
    Livingston Essential Transportation Services ....................... 15  
  Detroit Case Study Conclusions .................................................. 16  
CASE STUDY II: PHOENIX, AZ ........................................................... 18  
  Regional Context .......................................................................... 19  
  Regional Transit Agencies ........................................................... 20  
    Valley Metro ............................................................................ 20  
    Maricopa County Special Services ........................................... 22  
  Phoenix’s Conclusions ................................................................. 23  
CASE STUDY III: WASHINGTON, D.C. .................................................. 25  
  Regional Context .......................................................................... 26  
  Regional Transit Agencies ........................................................... 26  
    Washington Metropolitan Area Transit Authority (WMATA) ... 26  
    Ride-On Montgomery County Transit ...................................... 29  
    Alexandria Transit Company .................................................... 31  
  Washington D.C.’s Conclusion .................................................... 33  
CONCLUSION & RECOMMENDATIONS .............................................. 35  
  Conclusion .................................................................................. 36  
  Recommendations ....................................................................... 36  
APPENDIX ......................................................................................... 38  
  Appendix A: Sections 5310, 5316, and 5317 Descriptions ............ 39  
  Appendix B: Detroit Population Map ............................................ 40  
  Appendix C: Phoenix Population Map .......................................... 41  
  Appendix D: Washington, D.C. Population Map ............................ 42  
BIBLIOGRAPHY .................................................................................. 43
EXECUTIVE SUMMARY
As the number of Americans over the age of 65 increases in the coming years, the demands for “aging-in-place” will likely increase accordingly. Aging-in-place refers to the practice of remaining in one’s current setting for as long as reasonably possible while growing older. The focus of this research effort is narrowed to the examination of transportation and senior mobility. The impending increase of senior citizens suggests that the demand for senior mobility services will increase in the coming years. Thus, in the short-term, regional policy-makers must ensure, at the very least, the existing supply of senior mobility services is maintained. This may be a challenging task for many municipalities due to the current economic crisis and the shrinking of budgets.

In this research effort, the budgets of eight regional transit agencies were examined to determine the affects of the current economic climate on the supply of senior mobility services offered by those agencies. In doing so, the intention was to answer two main questions: (1) are the senior mobility services offered by these transit agencies vulnerable to competing local budget priorities; and (2) what are the affects on service. In framing the research, it was found to be impractical to conduct a broad survey of regional transit agencies across the nation; rather, it was determined that a case study approach would be better suited. To this end, three metropolitan regions were selected that are diverse in characteristics and are generally representative of different geographical, economical, and demographical conditions: Detroit, Michigan; Phoenix, Arizona; and Washington, D.C.

Detroit and its surroundings in the southeast region of Michigan continue to experience significant economic challenges. Regionally, assisting seniors with aging-in-place is a challenge given that the personal automobile is the dominant form of transportation and public transportation is largely limited to urban bus service in Detroit, Ann Arbor, and Oakland Counties. Within the metropolitan Detroit region, three agencies are instrumental in providing public transportation and senior mobility services: Ann Arbor Transportation Authority (AATA), Suburban Mobility Authority for Regional Transportation (SMART), and Livingston Essential Transportation Services (LETS). SMART and AATA appear to be fiscal stable due to the fact that they are funded by local property taxes. LETS, on the other hand, could become vulnerable to budget cuts and elimination of services should state or Federal funding be jeopardized. As of April 2009, service levels have not been impacted by the recent economic downturn, but should the economic climate worsen, service cuts could be possible.

The Phoenix metropolitan region is a unique demographic area, showcasing a high senior population in addition to a comparatively high youth population. This mix requires an equally unique response from state and local governments when responding to the current fiscal crisis. Due to the relatively high number of seniors within Maricopa County, there are a number of transit agencies that provide services that enhance senior mobility and support aging-in-place, including: Valley Metro and Maricopa County Special Transportation Services. While it seems as though Valley Metro will persevere through the current economic downturn, the same cannot be said for Maricopa County Special Services. Maricopa County Special Services has announced that it will cease services in July 2009.
The Washington D.C. metropolitan area is demographically, economically, and politically unique. The Washington D.C. area is comprised of approximately twenty local governments that are spread across the region and encompasses parts of Virginia and Maryland. There are numerous transit agencies that provide senior transportation services within the Washington D.C. metropolitan region, including: Washington Metropolitan Area Transit Authority (WMATA), Ride-On Montgomery County Transit, and the Alexandria Transit Company. Based upon both public and political support for senior mobility in the Washington, D.C. area, it is determined that the services presently offered are not in danger of reduction in the near-term. However, in the case of Ride-On Montgomery County Transit, absent considerable cost cutting measures, subsidized services may begin to see reductions.

Our findings from the case studies reveal that the most vulnerable transit providers of senior mobility programs are those that:

- Lack dedicated and robust operational funding sources
- Lack economies of scale
- And have limited avenues to fund their operational expenses

It is recommend that AARP:

- Advocate for the expansion of the Federal pilot program that allows selected states to use one-third of their Section 5310 funding for operational costs.
- Advocate for the expansion of Section 5307 to permit large urban areas to have more flexible discretionary spending to fund unforeseen operating costs.
- Advocate for the adoption of legislative language permitting Section 5316 and 5317 funds to supplement operational funds for Section 5307 transit programs in large urban areas.
INTRODUCTION
Setting the Stage

As the number of Americans over the age of 65 increases in the coming years, the demands for “aging-in-place” will likely increase accordingly. Aging-in-place refers to the practice of remaining in one’s current setting for as long as reasonably possible while growing older. A key element of aging-in-place is that it should not require compromising other aspects of life such as physical and mental health, or mobility. While the motives Americans have for wanting to age-in-place are vast, two prominent drivers are (1) the desire to preserve personal independence and (2) the desire to remain a member of the community he/she has long been a part of. Indeed, according to numerous surveys by the American Association of Retired Persons (AARP), the vast majority of respondents (over the age of 50) indicated that they would prefer to remain in their current setting for as long as possible.

Aging-in-place can refer to the desire to remain in one’s current home for as long as possible. For most seniors, this would be the ideal situation. In fact, an AARP survey found that approximately 89 percent of respondents agreed, to some degree, with the statement, “What I’d really like to do is remain in my home for as long as possible”.\(^1\) While this may be the case, many aging adults simply cannot exercise this option, as their current residence does not have the features or amenities necessary to support independent living.\(^2\) It should be noted there is a growing movement in America to incorporate the principals of universal design in housing development in order to make homes more senior friendly in general.

Conversely, aging-in-place can refer to the community that one desires to age in. Though homes can be designed, or otherwise retrofitted, to accommodate senior living, stakeholders must also be cognizant of the fact that community planning is a vital aspect of aging-in-place as well. The lack of adequate community services and amenities can drastically hinder the ability to age-in-place. To this end, communities must be designed to be “livable” for senior citizens. According to the AARP, a “livable community” refers to a community that “…has affordable and appropriate housing, supportive community features and services, adequate mobility options, which together facilitate personal independence and the engagement of residents in civic and social life.”\(^3\) According to Mia Oberlink, of the Center for Home Care Policy and Research, the six main components of “livable communities” are: housing, transportation and mobility, land use, cooperation and communication, public education, and involvement in community planning and leadership.\(^4\)

---

2. It should be noted though that it can be argued that it may not actually be practical for seniors to reside in their current residence given that the household size typically shrinks as they age. Thus, a large home that was once occupied by five or more residents may prove to be a burden for seniors due to upkeep requirements (e.g., household cleaning, landscaping, etc.).
Scope of Work

The focus of this research effort is narrowed to the examination of transportation and senior mobility. Senior mobility is a topic that receives relatively little attention by transportation planners; yet it a topic that will undoubtedly affect millions of Americans in the coming years. In fact, within the next 20 years, it is expected that Americans over the age of 65 will account for nearly 20 percent of the total U.S. population.

Senior Population Growth Projection

<table>
<thead>
<tr>
<th>Year</th>
<th>Total Population</th>
<th>Population of 65+</th>
<th>Percent of Total Population</th>
</tr>
</thead>
<tbody>
<tr>
<td>2005</td>
<td>295,507,134</td>
<td>36,695,904</td>
<td>12.42%</td>
</tr>
<tr>
<td>2010</td>
<td>308,935,581</td>
<td>40,243,713</td>
<td>13.03%</td>
</tr>
<tr>
<td>2015</td>
<td>322,365,787</td>
<td>46,790,727</td>
<td>14.51%</td>
</tr>
<tr>
<td>2020</td>
<td>335,804,546</td>
<td>54,631,891</td>
<td>16.27%</td>
</tr>
<tr>
<td>2025</td>
<td>349,439,199</td>
<td>63,523,732</td>
<td>18.18%</td>
</tr>
<tr>
<td>2030</td>
<td>363,584,435</td>
<td>71,453,471</td>
<td>19.65%</td>
</tr>
</tbody>
</table>

One of the biggest hurdles senior citizens face on the community level is lack of mobility. Many seniors are incapable of operating an automobile due to physical or mental ailments. Given that America is largely an auto-dependent nation, many senior citizens must rely on special senior mobility programs, offered by non-profit organizations and regional or municipal transportation agencies, in order to access vital services such as healthcare. The impending increase of senior citizens suggests that the demand for senior mobility services will increase in the coming years. Thus, in the short-term, regional policy-makers must ensure, at the very least, the existing supply of senior mobility services is maintained. This may be a challenging task for many municipalities due to the current economic crisis and the shrinking of budgets.

Methodology

In this research effort, the budgets of eight regional transit agencies were examined to determine the affects of the current economic climate on the supply of senior mobility services offered by those agencies. In doing so, the intention was to answer two main questions: (1) are the senior mobility services offered by these transit agencies vulnerable to competing local budget priorities; and (2) what are the affects on service.

Within the constraints of this project, it was found to be impractical to conduct a broad survey of regional transit agencies across the nation; rather, it was determined that a case study approach would be better suited. To this end, three metropolitan regions were selected that are diverse in characteristics and are generally representative of different geographical, economical, and demographical conditions: Detroit, MI; Phoenix, AZ; and Washington, D.C. For this research effort, regional councils of government act as a

---

5 Interim Projections of the Population by Selected Age Groups for the United States and States: April 1, 2000 to July 1, 2030. U.S. Census Bureau (Washington, D.C.; 2008)
standardized unit of measure for each metropolitan area. The three councils of
government are: Southeast Michigan Council of Governments (SEMCOG), Maricopa
Association of Governments (MAG), and Metropolitan Washington Council of
Governments (MWCOG). The use of this unit of measure brought consistency in
defining regional boundaries and in identifying regional resources.

**The Role of the Federal Government**

The Federal government has been very active in providing support to transit agencies and
senior mobility service providers. The federal government recognizes that it is important
to ensure that seniors do not become physically isolated from civic society. Taking
action to address the issue of senior mobility, Congress launched the Section 5310
program in 1975 to award grants to organizations “[serving] the transportation needs of
erly persons and persons with disabilities.”\(^6\) Under the Safe, Accountable, Flexible,
Efficient Transportation Equity Act: A Legacy for Users (SAFETEA-LU), Section 5310
was amended to mandate that:

“…projects funded with [Section] 5310 funds be derived from a locally
developed, coordinate public transit-human services transportation
plan…and [allow] transfers to Section 5307 or 5311, but only to fund
projects selected for Section 5310 program purposes.”\(^7\)

Section 5310 program funds can only be used for capital costs. While Section 5310
increases the number of vehicles that a program grantee can procure, it does not address
the fact that a larger vehicle fleet increases the operational costs associated with
expanding a program. The National Associations of State Units (NASUA), in a report,
titled *The Economic Crisis and its Impact on State Aging Programs*, highlights the impact
of rising operational costs and stagnating, or decreasing, operating funds on a state’s
ability to deliver a comprehensive senior mobility program via Section 5310 grants.\(^8\)
Operating expenses for Section 5310 programs are also increasing as a result of increased
demand caused by the economic crisis. The plight of Community Transportation Service
(CTS), a Section 5310 program grantee in Massachusetts, sums it up the best:

“over the last five years, [CTS’s] ridership has grown from 32,000 trips
per year to 55,000 trips last year. This represents a 75 percent increase in
service at a time that their annual allocation of operating funding has
remained the same…CTS’s primary ridership is employment transportation

---

\(^6\) *Section 5310 Program Overview*. Federal Transit Administration (Washington, D.C.; 2008), accessed

\(^7\) *Section 5310 Program Overview*. Federal Transit Administration (Washington, D.C.; 2008), accessed

\(^8\) *The Economic Crisis and its Impact on State Aging Programs: Results of All State Survey*. National
Associations of State Units (Washington, D.C.; 2008)
Because Section 5310 is limited solely to capital costs, programs such as CTS often supplement their operating costs through Section 5316 and 5317 (See Appendix 1). However, unlike Section 5310, which is based on an 80/20 Federal/state match, Federal operational funding assistance typically requires a 50/50 match.

Impact of the Coordinated Public Transit Human Services Transportation Plan

The inclusion of a stipulation to encourage the creation of Coordinated Public Transit Human Services Transportation Plans (CTP) has significant consequences. Requiring that programs utilizing Section 5310 funds must be stated in the CTP encourages stakeholders to make decisions regarding Section 5310 programs collectively, thus encouraging cooperation. The CTP also has provisions that incentivize implementing information technology to increase efficiencies and knowledge sharing. These provisions may contribute to lower operating costs. Although the inclusion of the CTP stipulation in Section 5310 is a step in the right direction, it is severely short sighted.

Senior mobility services provided by and/or supplemented by Section 5310, 5316, or 5317 program grantees are not the only programs affected. It is important that the plight of senior mobility programs provided by Section 5307 program grantees be examined, particularly those grantees deemed to be in large urban areas (LUAs). Although Section 5307 program grantees in LUAs can transfer capital funds from Section 5310 funds, Section 5307 grantees in LUAs have limited Federal avenues to supplement operating costs that relate to their senior mobility programs. As evidenced by the current economic crisis, it is a lack of discretionary choice for the use of apportioned funds for general operating costs that has most seriously affected senior mobility programs operated by mass transit agencies.

---

10 LUAs areas with a population of 200,000 or more.
CASE STUDY I: DETROIT, MI
Regional Context

Detroit and its surroundings in the southeast region of Michigan continue to experience significant economic challenges. Dependence on the automobile industry has disabled the region in recent decades as the industry has declined - though the technology, healthcare, and education sectors continue to help drive the regional economy.\(^\text{12}\)

The Southeast Michigan Council of Governments (SEMCOG) predicts that between 2005 and 2035, the regional senior population (ages 65 and older) will double from 584,143 to 1,199,378.\(^\text{13}\) Regionally, assisting seniors with aging-in-place is a challenge given that the personal automobile is the dominant form of transportation and public transportation is largely limited to urban bus service in Detroit, Ann Arbor, and Oakland Counties. However, several communities offer limited demand-responsive dial-a-ride programs, largely for disabled and/or elderly populations. These publicly operated programs often only serve a small area, such as a township, which can limit access to medical and other essential services that may be offered outside municipal boundaries.

Regional Transit Agencies

Within the metropolitan Detroit region, three agencies are instrumental in providing public transportation and senior mobility services: Ann Arbor Transportation Authority (AATA / The Ride), Suburban Mobility Authority for Regional Transportation (SMART), and Livingston Essential Transportation Services (LETS). The agency programs vary widely in services and scope, but all contribute to overall senior mobility and aging-in-place needs.

Ann Arbor Transportation Authority

Ann Arbor Transportation Authority (AATA, or “The Ride”) serves the greater-Ann Arbor and Ypsilanti area within Washtenaw County (communities forty miles west of Detroit). AATA provides a comprehensive curb-to-curb paratransit service using cabs, small buses, or lift-vans. Seniors with disabilities, who possess an AATA ADA card, are eligible for these services.\(^\text{14}\) Additionally, given that all AATA buses are low-floor and wheelchair accessible, seniors, who may not qualify for disabilities status, are also able to take advantage of the regular fixed-route services. Seniors ages 60-64, who posses a Fare Deal Card issued by AATA, are eligible to ride AATA’s fixed-route service at a reduced rates of $0.50, and seniors over the age of 65, who posses an AATA Senior Card,

\(^{12}\) Employment by Sector. SEMCOG (Detroit, MI; 2009), accessed May 5, 2009; available at: http://semcog.org/Data/bysubject.cfm

\(^{13}\) 2035 Forecast for Southeast Michigan. SEMCOG (Detroit, MI; 2009), accessed May 5, 2009; available at: http://www.semcog.org/Data/Apps/regional.forecast.data.cfm?mcd=8999

\(^{14}\) Programs & Service  AATA (Ann Arbor, MI; 2009), accessed May 5, 2009; available at: http://theride.org/aride.asp
may ride for $0.25. Group trips from senior housing complexes to grocery stores are also available through the “Senior Ride” program, further enhancing the ability to age-in-place. AATA’s fixed-route service is supplemented by the University of Michigan’s Transportation and Parking fixed-route bus service. While this service is intended for university student use, this free service is open to the community at large. The bus routes serve the State Street corridor, the University hospital, and health centers. This service provides access to University resources and entertainment venues, enhancing mobility for seniors and the general population. AATA also offers free senior travel training through its “Out & About” program, which is “designed to give seniors the opportunity and increased comfort level to use the bus system to take trips to local attractions… or get out into the community.”

According to the 2005-2007 American Community Survey, seniors ages 65 and older account for approximately 8 percent of the Ann Arbor population. The senior population in Ann Arbor has remained relatively stable since the 2000 census, but the number of elderly citizens taking advantage of transportation services provided by AATA has dropped significantly in the last ten years. In 1999, there were 324,290 elderly passenger trips on transportation services provided by AATA. By 2008, that number had dropped by nearly 100,000 to 239,301 total elderly passenger trips. Senior trips accounted for nearly one-tenth of all AATA trips in 1999 but only 4 percent of all trips in 2008. AATA’s overall ridership has grown by 65 percent in the last ten years, from 3.6 million trips to 5.6 million (see graph below).

15 Good as Gold Senior Programs & Services. AATA (Ann Arbor, MI; 2009), accessed May 5, 2009; available at: http://theride.org/goodasgold.asp
16 Parking and Transportation Services. University of Michigan (Ann Arbor, MI; 2009), accessed May 5, 2009; available at: http://pts.umich.edu/taking_the_bus/routes/
17 Good as Gold Senior Programs & Services. AATA (Ann Arbor, MI; 2009), accessed May 5, 2009; available at: http://theride.org/goodasgold.asp
Funding for AATA comes from two primary sources: operating assistance from Michigan state appropriations and a dedicated local property tax that is written into the city charter (see graph below). AATA also receives some Federal funding through the Federal Transit Administration’s Preventive Maintenance 80 percent funding program, with the state and local governments obligated to match the remaining 20 percent. Approximately one-seventh of all revenue comes from fixed-line and contract route farebox collections.\textsuperscript{19}

While the property tax is a stable funding source that has no significant competing priorities,\textsuperscript{20} AATA must compete against other transit agencies for state and Federal assistance. Although service would likely be cut if state or Federal funding were unavailable, more than fifty percent of funding comes from farebox revenues or local sources\textsuperscript{21} which would ensure that some level of service would remain if AATA were to be funded by local money alone.

Within the Detroit metropolitan region, AATA provides the most comprehensive senior services. These programs are instrumental in facilitating aging-in-place within the Ann Arbor community, and act as a regional model. Although the services AATA provide are exemplary, Ann Arbor and AATA have several advantages that other communities within the region may not share. Ann Arbor is a relatively compact, walkable area, compared to the service coverage areas of other regional transit agencies. Ann Arbor’s median household income of $51,232 is roughly double that of Detroit ($29,109),\textsuperscript{22} making Ann Arbor significantly wealthier than some of its regional counterparts. With its dedicated property tax, AATA enjoys a stable source of local income.

\textsuperscript{19} PTMS Reports (1999-2008). AATA (Ann Arbor, MI; 2009)
\textsuperscript{20} White, Chris (Manager of Service Development), AATA (Ann Arbor, MI; 2009); Interview: 15 April 2009
\textsuperscript{21} PTMS Reports (1999-2008). AATA (Ann Arbor, MI; 2009)
Suburban Mobility Authority for Regional Transit

Suburban Mobility Authority for Regional Transit (SMART) operates in Oakland, Wayne, and Macomb counties, serving the metropolitan Detroit region. Originally established in 1967 as SEMTA (Southeastern Michigan Transportation Authority) under Michigan Public Act 204, the agency was renamed SMART in 1989. SMART primarily provides fixed-route services, with limited flexible-route service. Disabled passenger services provided by SMART, which qualifying disabled seniors can participate in, are limited to pick-ups and drop-offs within a 0.75-mile radius of fixed route services. Requests for this service must be made one day in advance and trips cost an additional $1.50 (regular bus fare is $1.50). This service is only available during the hours and days of operation for each route.

SMART also participates in community-transit, in which SMART owns the vehicles used but local communities operate the service. Seventy-five communities within the Detroit metropolitan region participate in community-transit, with services varying from curb-to-curb service, job shuttles, and transit connector services. Most of these programs are curb-to-curb services, which often provide reduced fares for senior citizens (qualifying age varies by community). These services enhance mobility for the local aging population. Without community-transit services, elderly and disabled mobility would be greatly limited.

Though SMART experienced a decline in passengers from 2001-2004, ridership steadily increased since 2005 and continued to grow (see graph below). Between 1999 and 2008, SMART ridership increased by roughly 2 million passenger trips (from 10 million riders to 12 million). Senior trips account for approximately one-sixth of all trips.


---

23 Community Transit Partnerships. SMART (Detroit, MI; 2009)
24 SMART Community Services. SMART (Detroit, MI; 2009), accessed May 5, 2009; available at: http://www.smartbus.org/Smart/Ride+SMART/Services+by+Community/
25 PTMS Reports (1999-2008). SMART (Detroit, MI; 2009)
The majority of funding for SMART comes from local and state sources (see graph below). A 0.59 mill property tax, levied by SMART, is the sole source of local revenue for fiscal years 2007-2010. This tax is levied throughout all of Macomb County and portions of Wayne and Oakland Counties. The SMART-levied property tax was implemented in 1995 and will be up for renewal in 2010.

While property tax revenue is a relatively stable funding source, there have been declines in property values recently, which is expected to yield a significant decrease in revenue for SMART this year. Due to these potential shortfalls, the 2010 renewal process may include proposals for “an increase in the millage rate just to maintain existing services, raising passenger fares, administrative staff reductions, and cutting service.”

Though SMART competes against other transit providers for state and Federal dollars, a significant amount of its funding is obtained locally. Locally, the SMART millage competes against other millages that fund roads, libraries, and police and fire safety services. Should the local property tax millage fail to be renewed, SMART would face “severe service cuts.” Service cuts would negatively impact the mobility of all citizens in the Detroit region, and seniors who rely on public transit would be particularly affected. Although the community transit programs use vehicles owned by SMART, local communities operate the programs. Declining property values have reduced the funding available for transit, which may also impact the community-based programs. Should these programs also experience service cuts or elimination, the Detroit metropolitan region would be very limited in the mobility options available to a rapidly aging population.

---

26 Gardiner, Jay (Senior Planner), SMART (Detroit, MI; 2009); Interview: April 1, 2009
27 Gardiner, Jay (Senior Planner), SMART (Detroit, MI; 2009); Interview: April 1, 2009
28 Gardiner, Jay (Senior Planner), SMART (Detroit, MI; 2009); Interview: April 1, 2009
29 Gardiner, Jay (Senior Planner), SMART (Detroit, MI; 2009); Interview: April 1, 2009
Livingston Essential Transportation Services

Livingston Essential Transportation Services (LETS) is a countywide transportation program providing demand-responsive curb-to-curb service to county dialysis centers and to medical appointments in the surrounding counties of Washtenaw, Genesee, Oakland, and Ingham. The program began in 1977 and has experienced a steady growth in ridership (as seen in the graph below). Although the program primary serves disabled citizens, LETS provides a necessary, low-cost service that is beneficial to seniors. According to a the 2005-2007 American Community Survey, there are roughly 17,000 senior citizens residing in Livingston County, accounting for roughly 9.5 percent of the county population. Fares for senior citizens and disabled passengers range from $1-3 dollars (a fifty-percent fare reduction).

In 1999, LETS served 60,631 passengers in demand-response trips - 9,500 of who were elderly. In the ten-year period between 1999 and 2008, LETS overall ridership has nearly doubled, from 60,631 to 104,500 passengers, and it now serves twice as many elderly riders. According to LETS management, the program has been growing steadily for the last ten years; as of April 2009, LETS serves between 450-560 passengers daily with 12 demand-response transit vehicles.

(Source: LETS PTMS Reports (1999-2008))

---

30 FAQs. LETS (Howell, MI; 2009), accessed May 5, 2009; available at:
http://www.co.livingston.mi.us/lets/faqs.htm
31 Kapanowski, Cindy (Dispatch/Driver), LETS (Howell, MI; 2009); Interview: March 24, 2009
(Washington, D.C.; 2008)
33 Fares. LETS (Howell, MI; 2009), accessed May 5, 2009; available at:
http://www.co.livingston.mi.us/lets/fares.htm
34 PTMS Reports (1999-2008). LETS (Howell, MI; 2009)
35 Kapanowski, Cindy (Dispatch/Driver), LETS (Howell, MI; 2009); Interview: March 24, 2009
State and Federal funding are the primary sources of revenue for the LETS program (as shown in the graph below). As of 2008, fares account for roughly one-tenth of total revenue. Until 2003, the LETS program received annual funding through county appropriations from the general fund. In 2003, the Interstate-96 (I-96) corridor, which runs through Livingston County, was designated as a “growth corridor”, making the LETS program eligible for FTA Section 5307 grant funding for large urban cities. Though the local economy has struggled in recent years, this shift in funding has saved the program. Without the I-96 “growth corridor” status and Section 5307 funding, Livingston County would no longer be able to fund the LETS program, and it would be vulnerable to program cuts or even possible elimination.

![LETS Funding (1999-2008)](source: LETS PTMS Reports (1999-2008))

Although the LETS program is not part of a regional fixed-route transit system like AATA or SMART, it is a model program for how municipalities without transit agencies can provide essential transportation services to senior citizens to facilitate mobility and aging-in-place. In fact, Midland, MI is studying the LETS program as a model for transportation operations.

**Detroit Case Study Conclusions**

Senior mobility services vary throughout the Detroit metropolitan region. Transportation and mobility in the region is largely focused on the personal automobile, but community-based programs provide transit services and supplement fixed-route bus networks within the region. Although large agencies such as SMART and AATA, which provide fixed-

---

36 PTMS Reports (1999-2008). LETS (Howell, MI; 2009)
37 Britz, Douglas (Director), LETS (Howell, MI; 2009); Interview: March 26, 2009
route services, experience fiscal stability through protected local property taxes (relatively speaking), smaller providers within the Detroit region, such as LETS, are vulnerable to budget cuts and elimination of services should state or Federal funding be jeopardized. As of April 2009, service levels have not been impacted by the recent economic downturn, but should the economic climate worsen, service cuts could be possible. Cutting or eliminating these programs would negatively impact senior mobility and the ability to age-in-place.
CASE STUDY II: PHOENIX, AZ
Regional Context

The state of Arizona, like many other states, is the provider of individual grants to agencies operating senior transit services. Arizona Department of Transportation (ADOT), with a budget of $3.7 million dollars, selects, organizes, ensures quality service, and aids in the procurement of vehicles for 150 agencies that are spread across the state. The majority of this funding comes from the Federal Transit Administration in a number of different grants, which include Section 5310 funding (for capital funding assistance) and Section 5317 funding (which provides funding assistance to help subsidize taxi fares, dial-a-ride, and ride sharing programs). While many transit organizations in the Maricopa County region have funding via tax revenues, the agencies find it necessary to continue lobbying for Federal grant monies to remain afloat throughout the fiscal year.

In an effort to coordinate senior transit services, and the agencies that offer these services, ADOT created the “Arizona Rides Program”. This was in response to the U.S. Department of Transportation’s (DOT) “United We Ride” initiative, “which helps fund human services transportation to coordinate, collaborate, and examine internal processes for improved efficiencies in resource use, service to transportation-challenged persons (low income, disabled, elderly), and flexibility in meeting variety of program goals.” Maricopa County, which includes the greater Phoenix-Mesa-Scottsdale area, is among the many regions that submitted proposals for these senior service grants.

The Phoenix metropolitan region is a unique demographic area, showcasing a high senior population in addition to a comparatively high youth population. This mix requires an equally unique response from state and local governments when responding to the current fiscal crisis. Phoenix is located within Maricopa County, a county equivalent in size to the state of Vermont, with a land area of 9,203 square miles. This area holds more than half the population of Arizona, topping out at around 3.9 million persons. This large proportion represents one of the highest incomes per capita in the state, with an average earning of $74,077 per household (as compared to an average state household income of $47,370). The aging population in Maricopa County varies greatly; percentages range from 23.3 percent to 69.7 percent of the population in certain areas within the greater Phoenix region.

38 Special Needs Transit (PowerPoint presentation). AZDOT (Phoenix, AZ; 2009)
39 Arizona Rides: Coordinating Human Service Transportation. AZDOT (Phoenix, AZ; 2009)
40 State and County QuickFacts: Maricopa County, AZ. U.S. Census Bureau (Washington, D.C.; 2009), accessed April 1, 2009; available at: http://quickfacts.census.gov/qfd/states/50000.html
41 State and County QuickFacts: Maricopa County, AZ. U.S. Census Bureau (Washington, D.C.; 2009), accessed April 1, 2009; available at: http://quickfacts.census.gov/qfd/states/50000.html
Regional Transit Agencies

Due to the relatively high number of seniors within Maricopa County, there are a number of transit agencies that provide services that enhance senior mobility and support aging-in-place. To gain a perspective on these services, this case study will focus on two different transit systems: Valley Metro and Maricopa County Special Transportation Services. Each of these systems presents a unique perspective on the greater Phoenix metropolitan region. Valley Metro is an all-encompassing, region-wide transit organization that is composed primarily of three different transit companies. Conversely, Maricopa County Special Transportation Services focuses solely on special services such as senior mobility transportation and programs that assist seniors in becoming familiar with transit alternatives.

Valley Metro

Throughout Maricopa County, transit agency budgets are being heavily scrutinized as regional economic conditions continue to fluctuate - and Valley Metro is no exception. Like many other agencies, Valley Metro has yet to finalize a fiscal year 2010 budget.

Tierney, Susan (Public Information Officer), Valley Metro (Phoenix, AZ; 2009); Interview: April 13, 2009
This is partly due to the complex make-up of Valley Metro, which is actually comprised of different sub entities, each of which is funded differently. The three main entities are: the City of Phoenix Public Transit Department, Tempe in Motion, and Regional Public Transit Authority.

The City of Phoenix Public Transit Department, which represents 65 percent of Valley Metro, provides bus service on routes within the physical city limits of Phoenix. Buses are equipped to handle ADA customers and are senior friendly. The Department receives three-eighths of a percent of local sales tax revenue. This revenue stream is the Department’s main source of funding.

Tempe in Motion (TIM) is a City of Tempe transit organization, which represents 15 percent of Valley Metro. TIM’s goal is to discourage the use of the automobile as the primary mode of personal transport. Tempe is one of the larger cities in Arizona and its transit system provides services for senior citizens through traditional fixed route service and Dial-A-Ride service. The Dial-A-Ride service is a phone-ahead van service that provides curb-to-curb transportation for eligible riders. TIM’s primary funding source is sales tax revenue; TIM receives half a cent of every dollar generated by local sales tax.

The Regional Public Transit Authority (RPTA), which represents 15 percent of Valley Metro, facilities cohesion between all the transit organizations in the Valley. Moreover, RPTA works to connect all the separate Dial-A-Ride services offered throughout Maricopa County. According to a RPTA representative interviewed as part of this case study, the overall goal of RPTA is to provide seamless transaction throughout the valley. Currently, it is nearly impossible for a senior citizen to commute from one side of the valley to another without having to switch services at municipal lines. Among the special initiatives targeted at senior citizens is the “Travel Training” program and the “Bag it Program”. Both programs provide senior citizens guidance on utilizing existing transit programs to better navigate Maricopa County. Local sales tax revenue is RPTA’s primary source of funding, as RPTA receives a portion of half a cent of local sales tax revenue.

In most cases, each of these programs is individually funded through a portion of the sales tax. However, revenue received from sales tax proceeds is inadequate to cover the entire cost of operations, let alone cover preventative maintenance and capital expenses. Thus, each transit organization has been forced to increase fares in order to continue operations. Of the numerous transportation organizations within Valley Metro, the City of Mesa is the only organization having to cut back on services provided to the senior population. It has become necessary for this organization to scale back on providing Dial-A-Ride services to seniors that fall outside the scope of the ADA eligibility. It should be noted that as of April 1, 2009, RPTA is attempting to augment its funding with Federal grants.

---

44 Tempe in Motion. Temple in Motion (Temple, AZ; 2009), accessed April 2, 2009; available at: http://www.tempe.gov/Tim/

45 Tierney, Susan (Public Information Officer), Valley Metro (Phoenix, AZ; 2009); Interview: April 13, 2009
Maricopa County Special Services

Maricopa County Special Services is not specifically focused on issues of senior transit; rather senior transit issues are addressed in unison with special needs and low-income transit services. Of the 90,000 rides that this agency provides to its focus group, 60,000 are provided to the elderly in programming that includes dial-a-ride service, subsidized taxi rides, and connector routes. In a survey commissioned by the Maricopa Association of Governments Elderly Mobility Working Group, it was found that these types of elderly transportation services were highly acceptable forms of transportation, “Nearly three in five (58 percent) respondents think neighborhood shuttle buses are one of the top two alternatives that would be most beneficial to seniors personalized subscription transportation services using vans (32 percent) and transportation specialists that provide ‘one-call-does-it-all’ information (29 percent) round out the top three transportation options.” In this same document, Maricopa County outlines a progressive plan to address the needs of the increasingly aging population, which includes enhanced infrastructure (streets and walkways), driver improvement classes for seniors, awareness/outreach, and improved transit programs.

One of the many barriers, aside from political will and the long-term involvement of key partners, is, “[f]inding funding to help implement programs that will address the issues identified in the recommendations.” Given the structure of the current funding scheme and the sources from which Maricopa County funds its senior transit programs, none of these plans will be implemented. In fact, as county funding starts to feel the pressure of the economic crisis, these programs will likely face a serious decrease in services.

Unlike other transit agencies in the region operated by the city, which subsidize transit budgets with a voter approved sales tax, Maricopa County Special Services funds 80 percent of its operations with contributions from local governing entities and state and Federal grants, such as the Section 5310 funding. While this 80 percent is generally ensured, the final 20 percent of the budget comes from ad-hoc funding sources which include lottery/gambling income, FTA funding, and grants from local organizations like the local Agency on Aging organization. Though Maricopa County Special Services averaged $2.2 million in annual funding since 1992, the agency has experienced fluctuations in funding since 1992 (see graph below). After hitting its peak in funding in 1994, with a reported $4.3 million budget, the agency suffered a huge shortfall in funding in 1995, with a reported $817,000 budget. Since 1995, the agency has slowly increased its funding to 1994 levels.

46 About Special Transportation Services. Maricopa County Human Services Department (Phoenix, AZ; 2009), accessed April 12, 2009; available at:  http://www.hsd.maricopa.gov/sts/
47 Regional Action Plan on Aging & Mobility. Maricopa Association of Governments (Phoenix, AZ; 2009)
48 Regional Action Plan on Aging & Mobility. Maricopa Association of Governments (Phoenix, AZ; 2009)
49 Schenck, Arlene (Field Operations Supervisor), Maricopa County Special Services (Phoenix, AZ; 2009); Interview: April 6 2009
Though this increase in funding portrays a positive outlook, in reality, Maricopa County Special Services has felt the effects of the current economic crisis. As a result of tightening budgets, Trish Georgeff, county human services director, announced on April 13, 2009 that Maricopa County Special Services would cease services on July 1, 2009.\textsuperscript{50}

Cuts in allotments from the County general funds and reduced revenue from ad-hoc funding have devastated the Maricopa County Special Services budget. Other social services, schools, and environmental services experienced similar budget cuts, while budgets for elected constables, justices of the peace, and police precincts received additional funding for the year.\textsuperscript{51}

The cancellation of service will no doubt reverberate with the surrounding agencies as they try to provide services to customers left in the void. In the face of huge increases in the elderly population, this agency and its respective ad-hoc funding scheme should serve as a warning to communities. In order to address the needs of the elderly, agencies and communities in which they operate will have to secure long-term funding; not only to ensure continued service, but to ensure the ability for agencies to respond to growing demands with appropriate and gradual application of programming and services.

**Phoenix’s Conclusions**

While it seems as though Valley Metro will persevere through the current economic downturn, the same cannot be said for Maricopa County Special Services. Though services are scheduled to cease in July, the service void will be filled by other local

\textsuperscript{50} Schenck, Arlene (Field Operations Supervisor), Maricopa County Special Services (Phoenix, AZ; 2009); Interview: April 6 2009

transit agencies still in place throughout Maricopa County, whose services already overlap the service area covered by Maricopa County Special Services.

Phoenix’s transit agencies providing senior-mobility services are facing a range of different budget constraints. While some are able to overcome these deficits with increases in fares, other agencies are cutting back on services, leaving many seniors with fewer mobility options. It is obvious that funding sources will have to become more stable in order for these agencies to handle the current demand, as well as the increased demand expected as the elderly population grows in the coming years.
CASE STUDY III: WASHINGTON, D.C.
Regional Context

The Washington D.C. metropolitan area is demographically, economically, and politically unique. The Washington D.C. area is comprised of approximately twenty local governments that are spread across the region and encompasses parts of Virginia and Maryland. The Washington D.C. metropolitan region is also comprised of both urban and suburban communities. According the U.S. Census Bureau, as of July 2008, the Washington D.C. metropolitan area has a total population of approximately 5,358,130.\(^{52}\)

Regional Transit Agencies

In order to gain a better perspective on the senior mobility programs offered in the region, this case study will focus on three transit agencies: Washington Metropolitan Area Transit Authority, Ride-On Montgomery County Transit, and the Alexandria Transit Company. These three transit agencies are representative of varying services levels, scope, and programming.

Washington Metropolitan Area Transit Authority (WMATA)

The Washington Metropolitan Area Transit Authority (WMATA) is tasked with the duty of planning, developing, financing, building, operating, and maintaining the Metrobus, Metrorail, and MetroAccess (paratransit) transit systems for the Washington, D.C. metropolitan area. WMATA’s service area encompasses 1,500 square miles, which includes service in Northern Virginia, Washington, D.C., and Southern Maryland; thus making it the “fifth largest bus network and the second largest rail system in the United States.”\(^{53}\) According to WMATA, the system serves a population nearing 3.5 million residents.\(^{54}\)

The Federal government funds approximately 65 percent of WMATA’s capital costs. Operational costs are funded by local government contributions (see table below) and through ridership fares at 42 and 58 percent respectively.

---

52 Metropolitan and Micropolitan Statistical Areas (Excel spreadsheet). U.S. Census Bureau (Washington, D.C.; 2009)
53 WMATA Facts. WMATA (Washington, D.C.; 2008)
54 WMATA Facts. WMATA (Washington, D.C.; 2008)
WMATA provides senior mobility services for persons 65 and older, and to those with ADA-eligible disabilities. WMATA provides these transit services through traditional fixed-route Metrobus and Metrorail services, in addition to point-to-point service via Metroaccess. Those persons eligible for MetroAccess are permitted to ride free of charge, along with a companion, on Metrobus, Metrorail, D.C. Circulator, and Montgomery County Ride-On, City of Falls Church GEORGE, Fairfax Connector, Prince George’s County TheBus, and the City of Fairfax CUE.55

MetroAccess provides mobility services for seniors and persons with disabilities (as defined by the ADA)56 who, due to their condition, are unable to use standard Metrobus or Metrorail services independently. The service is based on a shared-ride call-in service, requiring a minimum one-day advance reservation. In order to become eligible for the program, participants must obtain a WMATA identification card, which also grants free access to Metrobus and Metrorail. While the program is operated by contractors, the fare structure is based on the standard paratransit rate of $2.50, with an additional $1.00 added for every three miles beyond three-quarters of a mile radius of a standard bus stop. For those trips beyond three-quarters of a mile, the total amount will not exceed $6.25.

MetroAccess ridership has continued to increase over the last five years (see graph below).57 In fact, the total number of trips completed increased by 28 percent from 972,425 to 1,355,898 between 2006 and 2008, and is forecasted to increase by an additional 17 percent in 2010 to an estimated 1,648,007 trips completed.58

---

55 Leggett, Isiah. *Transportation Options for Persons With Disabilities: Traveling To, From and around Montgomery County, MD*. Montgomery County (Rockville, MD; 2009)
58 Approved Fiscal 2009 Annual Budget. WMATA (Washington, D.C.; 2009)
Trips requested increased by 7 percent between 2006 and 2008, peaking in 2007 at 1,856,571, and are expected to surpass that level in 2010 (reaching 2,400,000 requested trips). In order to keep pace with demand, funding for the program has increased by 32 percent between 2006 and 2008; and funding is forecasted to reach $63,521,100 in 2010 (see graph below).

Further evidence can be drawn from the WMATA Sustainment and Fleet Procurement Plan. In 2006, WMATA developed the Sustainment and Fleet Procurement Plan as a blueprint for capital fleet purchases through 2013. The plan is a tool that estimates the anticipated growth in paratransit ridership and the number of vehicles required to meet

---

59 Approved Fiscal 2009 Annual Budget. WMATA (Washington, D.C.; 2009)
60 Approved Fiscal 2009 Annual Budget. WMATA (Washington, D.C.; 2009)
61 Jones, Leroy (Director of MetroAccess), WMATA (Washington, D.C.; 2009); Interview: April 4, 2009
the demand. According to the Plan, ridership will increase by an average of 11.2 percent through 2013, necessitating the procurement of 468 vehicles, increasing the fleet size to a total 1,184 vehicles.62

Ride-On Montgomery County Transit

The Montgomery County Transit Agency operates a variety of senior mobility programs including Ride-On subsidized fixed route bus service, “Call ‘N’ Ride” point-to-point service, and “Connect ‘A’ Ride” referral service.

Ride-On

Ride-On provides subsidized bus fare service for senior citizens and persons with disabilities in order to access services through the Montgomery bus and Metrobus networks. The system is comprised of a fixed route bus network servicing major transfer points and transit centers throughout Montgomery County. In order to be eligible for service, participants are required to present a Metro Senior identification card in addition to valid photo identification. Participants in the program may also access the services provided by WMATA Metrorail and Metrobus.

Ride-On has experienced a steady increase in ridership since 2005, when the system experienced 25.1 million boardings, compared to that of 2008 when approximately 29.7 million boardings occurred, representing a 15.4 percent increase.63 During this time, senior access to the Ride-On and Metrobus increased as well. In 2006, senior citizens and persons with disabilities were permitted to ride free of charge during off-peak hours, and on weekends.64 In January 2008, the program was expanded to allow seniors and persons with disabilities to access Ride-On and Metrobus during all hours of operation, doubling ridership to approximately 1.4 million boardings annually.65

While funding for Ride-On increased during this period, relative funding is expected to decline between 2009 and 2010, leading to the possibility for service reductions. Media reports in the early months of 2009 have indicated that the County is considering repealing senior Ride-On privileges for 2010, rather then increasing Ride-On and Metrobus fares by $.60 for all passengers.66 Objections to the fare increase stem from Washington, D.C. representatives who committed to taking fare increases off the table, in favor of reducing service frequency over the entire network. While this principal has merit in city centers, suburban areas such as Montgomery County are at a disadvantage due to existing infrequencies in service.

63 Transit Services (Montgomery County Budget FY 2010). Montgomery County (Rockville, MD; 2009)
64 Transit Services (Montgomery County Budget FY 2007). Montgomery County (Rockville, MD; 2008)
65 Transit Services (Montgomery County Budget FY 2010). Montgomery County (Rockville, MD; 2009)
66 County Eyes Suspending Free Bus Service For Seniors, Disabled. WTOP (broadcast: March 31, 2009); available at: http://www.wtop.com/?nid=25&sid=1637427
Office of Special Transportation

The Office of Special Transportation coordinates transportation options for seniors and persons with disabilities based on a user-side subsidy. The Office provides transportation services through the “Connect ‘A’ Ride” referral program and the “Call ‘N’ Ride” program. “Connect ‘A’ Ride” is a referral program that assists seniors and persons with disabilities access various community and volunteer based transportation services.

The County “Call ‘N’ Ride” program provides subsidized taxi trips for low-income seniors and persons with disabilities. Administered by the Special Transportation Office, “Call ‘N’ Ride” provides subsidies for low-income seniors, ages 67 years or older, and for those with disability, over the age of 16. Subsidies are provided in the form of coupon books based on a sliding income schedule, ranging from $5.25 per $60 book (for families earning less than $14,000 annually), to $30 per $60 book (for families earning between $20,000 and $25,000). These coupons can be used for taxicab companies operating under contract for the County.67

As with Ride-On, Montgomery County acknowledged senior mobility needs by expanding the “Call ‘N’ Ride” program and increasing the maximum coupon value to $112 per month per participant in 2006, and again to $120 in 2007 (to offset increasing meter rates).68 Furthermore, in 2008, “Call ‘N’ Ride” was again expanded to accommodate more seniors and persons with disabilities by increasing the income level requirement to $25,000.69

Funding for the Office of Special Transportation experienced a 31 percent increase between 2006 and 2009, peaking at $8.33 million (see graph below).70 But as of May 2009, the Office has fallen victim to rampant budget cuts resulting in a proposed $1 million reduction in the “Call ‘N’ Ride” program. The FY 2010 Budget proposes these cuts be accomplished through gains in efficiencies and withholding employee cost-of-living increases, with no impacts made to existing services levels.71

---

67 Transit Services (Montgomery County Budget FY 2010). Montgomery County (Rockville, MD; 2009)
68 Transit Services (Montgomery County Budget FY 2007). Montgomery County (Rockville, MD; 2008)
69 Transit Services (Montgomery County Budget FY 2007). Montgomery County (Rockville, MD; 2008)
70 Transit Services (Montgomery County Budget FY 2007). Montgomery County (Rockville, MD; 2008)
71 Transit Services (Montgomery County Budget FY 2007). Montgomery County (Rockville, MD; 2008)
Alexandria Transit Company

The Alexandria Transit Company (ATC) operates both curb-to-curb service and fixed bus route transit services within the City of Alexandria. These services were designed to complement existing Metrorail and Metrobus programs which focus primarily on circulator routes designed for access to and from Washington, D.C. For residents and visitors precluded from using fixed route transit resources, the DOT Paratransit and Senior Transit provide point-to-point service through a cab voucher program. In 2006, the Northern Virginia Transportation Committee projected that the senior population would increase from 11,600 in 2000 to 13,100 by 2030, representing a constant 9 percent of the population.\footnote{Meeting the Transportation Needs of Northern Virginia’s Seniors: Recommendations For Public Transit Systems and Other Mobility Providers. Northern Virginia Transportation Commission (Arlington, VA; 2006)}

Office of Aging and Adult Services

The Office of Aging and Adult Services (OAAS) provides resources for seniors and persons with disabilities, focusing on low income or those at risk of being institutionalized.\footnote{Office of Aging & Adult Services. City of Alexandria (Department of Human Services) (Alexandria, VA; 2009), accessed April 2, 2009; available at: http://alexandriava.gov/humanservices/info/default.aspx?id=8002} The OAAS provides transportation options for this segment of the population through the Special Transportation Unit and “Senior Taxi” programs. The Special Transportation Unit provides transportation services to senior centers, shopping centers, and other special trips. While a programmatic funding level is not specified in the City’s annual budget, the OAAS’s budget appears stable, and is forecasted to remain stable in FY 2010.\footnote{Transit Services (Montgomery County Budget FY 2010). Montgomery County (Rockville, MD; 2009)}
The “Senior Taxi” program began operations in accordance with the Older American Act of 1965, which requires services to be available to all seniors regardless of income. In 2002, the program was granted funding to expand services five miles beyond the City limits. Funding required to expand the service was estimated to cost an extra $30,000 annually. While funding for this program declined by nearly $60,000 in the FY 2010 budget request, service levels are expected to remain at FY 2009 levels (see graph below).

DOT Paratransit Program

ATC operates the DOT Paratransit program as a specialized transportation service for residents of Alexandria and visitors with disabilities who are unable to use regular transit buses or rail. Transit services are provided by taxicabs and wheelchair accessible vans, with the area of service encompassing the cities of Alexandria, Fairfax, and Falls Church, in addition to Arlington and Fairfax counties. These trips are scheduled on an advance-reservation basis.

The fare structure for this operation is aligned with MetroAccess, in order to provide consistency across the system. One-way trips within the City of Alexandria cost $2.00 per person while those outside the City limits are $2.50. As some seniors travel with personal care assistants, there is no charge for these additional passengers. Eligibility for this program is based upon an application process, administered by the City of Alexandria’s Office of Transit Services and Programs.

Due to Alexandria’s large tourist industry, DOT Paratransit offers accommodations for senior and disabled visitors for a cumulative 21-day period. Access is based upon a visitor’s eligibility to receive ADA paratransit services in the jurisdiction in which they reside.

---

Since FY 2002, service demand has remained relatively constant averaging 56,799 one-way trips annually. However the cost-per-trip has continued to increase with operating costs, marking a 34 percent increase in per-trip cost over the same period. During this time however, programmatic funding increased considerably from $850,000 in 2002 to an estimated $1.4 million, requested for FY 2010 operations (see graph below).

![DOT Paratransit Funding (FY02-10)](Source: City of Alexandria FY 2002-2010 Annual Budgets)

This has become a much-debated issue as the City of Alexandria is facing considerable budget shortfalls. Due to the importance placed upon senior mobility however, the City has sought alternative methods of coping with the estimated $10.7 million budget shortfall. Rather than targeting senior transportation services, the ATC recently conducted an analysis of DASH ridership levels for off-peak hours and service locations on a variety of routes. In a number of cases, locations served less than 500 passengers annually. While the proposed savings equal $399,000, the City believes that a combination of modest fare increases and service reductions, coupled with a flat budget projection for DOT Paratransit, will mitigate the budget shortfall.

**Washington D.C.’s Conclusion**

Based upon both public and political support for senior mobility in the Washington, D.C. area, it is determined that the service levels presently offered are not in danger of reduction in the near-term. This can be directly attributed to the regional funding system where as shortfalls are spread across a diverse set of communities, hence hedging funding sources in the event of a downturn. Alexandria City Transit is expected to continue its senior mobility programs with little effect in service levels. The City has noted a need to reduce costs across the system, however, it has committed to retaining existing service.

---

77 *City of Alexandria FY 2003 Budget.* City of Alexandria (Alexandria, VA; 2002)
78 *City of Alexandria FY 2003 Budget.* City of Alexandria (Alexandria, VA; 2002)
80 *Transit Services* (Montgomery County Budget FY 2010). Montgomery County (Rockville, MD; 2009)
levels. Conversely, Montgomery County has based historical spending on unrealistic tax revenues, which as have experienced considerable declines in recent history. Due to a diminished revenue stream, the County will continue to explore additional cost cutting options. In the near-term, senior transit options are considered to be secure, however absent considerable cutbacks across the county budget, subsidized services may begin to see reductions.
CONCLUSION & RECOMMENDATIONS
Conclusion

Although this research effort has shown that senior mobility services are not extremely vulnerable, vulnerabilities are linked to the budget decisions that immediately impact transit services. The current economic crisis has highlighted senior mobility vulnerabilities associated with current local, state and Federal transit formula funding methods. The findings from the case studies conducted on transit agencies and paratransit service providers in the Washington, D.C., Phoenix, and Detroit metropolitan areas overwhelming conclude that the most vulnerable transit providers of senior mobility programs are those that:

- Lack dedicated and robust operational funding sources
- Lack economies of scale
- And have limited avenues to fund their operational expenses

In the Phoenix metropolitan area, Maricopa County Special Services is an example of a paratransit service provider that lacks a robust operational funding source. That structural deficiency has created a situation in which the agency has become insolvent and will cease to provide services in July 2009. However, the various sub-entities that comprise Valley Metro in Maricopa County have dedicated funding sources that are generally derived from a sales tax.

The data from the Detroit metropolitan area case study also illustrates the importance of robust operational funding sources. Had it not been deemed eligible for Section 5307 operational funding, LETS would have become insolvent. AATA is solvent because it has a dependable funding source that is codified in the City of Ann Arbor’s charter. The Detroit and Phoenix examples both show that although the presence of a dedicated funding source may not be enough to fully fund operational costs, their presence can provide enough support to keep those transit agencies solvent during the early days of an economic crisis.

The case studies also show that transit agencies with small economies of scale are more vulnerable because they are less resilient to changes in the market. Valley Metro and WMATA are examples of transit agencies that possess economies of scale large enough to allow them to endure the worse of the current economic crisis without making substantial cuts in services to senior mobility programs.

Recommendations

Although the funding for transit agencies that provide senior mobility programs will likely continue the trend of increasing on the Federal level, it is uncertain, given the several competing budget priorities this economic crisis has created, if any substantial changes will be made to the Federal transit funding formulas. The competing budget priorities for local and state governments may also hinder significant changes in their formulas for funding transit. Given this reality, it is recommend that AARP focus its
efforts on reforming Federal funding formulas to ensure that more money trickles down to programs that support senior mobility services on the state and local level. In the likelihood that only minimal changes will be enacted during the next surface transportation reauthorization, it is recommend that AARP lobby for the following legislative changes to Federal grant programs that affect senior mobility service providers:

1. In regard to Section 5310, it is recommended that AARP advocate for the expansion of the Federal pilot program that allowed selected States to apply up to one-third of the allocated funds for operating assistance.81

2. AARP should advocate for the expansion of Section 5307 to permit LUAs to have more flexible discretionary spending to fund unforeseen operating costs. All such decisions would be subject to Federal review to prove that cuts in services along established routes are eminent to remain solvent.

3. AARP should lobby the jurisdictional committees in the U.S. House of Representatives and U.S. Senate to adopt legislative language permitting Section 5316 and 5317 funds to supplement operational funds for Section 5307 transit programs in LUAs. The use of the funds would have to be in compliance with Section 5316 and Section 5317, and would be subject to Federal review.

---

APPENDIX
### Appendix A: Sections 5310, 5316, and 5317 Descriptions

<table>
<thead>
<tr>
<th>Program</th>
<th>Elderly and Disability Program</th>
<th>Job Access Reverse Commute</th>
<th>New Freedom</th>
</tr>
</thead>
<tbody>
<tr>
<td>Section</td>
<td>5310</td>
<td>5316</td>
<td>5317</td>
</tr>
<tr>
<td><strong>Program Goal</strong></td>
<td>Help non-profit organizations provide transportation services where public transit is “unavailable, insufficient or inappropriate”</td>
<td>Enhance access to employment and employment related activities (e.g., child care, training, etc) and provide reverse commute services</td>
<td>Fill transportation service gaps for individuals with disabilities - New Public Transportation Services and Public Transportation Alternatives Beyond the ADA</td>
</tr>
<tr>
<td><strong>Target Audience</strong></td>
<td>Older adults and individuals with disabilities of all ages</td>
<td>Individuals with lower incomes, and the individuals who “reverse commute” from urban or rural areas to suburban employment sites</td>
<td>Individuals with disabilities of all ages</td>
</tr>
<tr>
<td><strong>Funding</strong></td>
<td>Formula program (FY 06=$110M)</td>
<td>Formula program (FY06=$137 M)</td>
<td>Formula program (FY06=$77M)</td>
</tr>
<tr>
<td><strong>Administrative Mechanisms</strong></td>
<td>-States administered for all urbanized and rural areas</td>
<td>-State administered: 20% for rural and 20% for small urbanized areas &lt;200,000</td>
<td>-States administered: 20% for rural and 20% for small urbanized areas &lt;200,000</td>
</tr>
<tr>
<td></td>
<td>-Subrecipients: private non-profit agencies, and public entities that coordinate human service transportation</td>
<td>-60% to designated recipients identified by the Governor for large urbanized areas &gt;200,000</td>
<td>-60% to designated recipients identified by the Governor for large urbanized areas &gt;200,000</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Subrecipients: public agencies, private non-profit agencies, and private operators</td>
<td>- Subrecipients: public agencies, private non-profit agencies, and private operators</td>
</tr>
<tr>
<td><strong>Eligible Activities</strong></td>
<td>-Capital (e.g., small buses, vans, maintenance, ITS technology, etc.) Note: Under this program only, capital can include contracts for transportation services (e.g., accessible taxi, paratransit, rideshare, etc.). SAFETEA-LU pilot allows 7 states to use 1/3 of funds for operating assistance)</td>
<td>-Capital (e.g., small buses, vans, private vehicles through loans, ITS technology, maintenance)</td>
<td>-Capital (e.g., accessible taxi, accessible vans, buses, ITS technology, maintenance, and accessibility improvements (e.g., signage, curb cuts, bus stops, etc).</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Operating (e.g., fuel, drivers, dispatchers, reimbursement for volunteer mileage,)</td>
<td>-Operating (e.g., fuel, drivers, dispatchers, reimbursement for volunteer mileage, travel training)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>-Planning (e.g., route planning, service design)</td>
<td></td>
</tr>
<tr>
<td><strong>Coordination</strong></td>
<td>Requires Community-Based Public Transit/Human Service Transportation Plan</td>
<td>Requires Community-Based Public Transit/Human Service Transportation Plan</td>
<td>Requires Community-Based Public Transit/ Human Service Transportation Plan</td>
</tr>
<tr>
<td><strong>Notes</strong></td>
<td>Program started in FY 1975 – capital only for private non-profits. ISTEA and TEA-21 expanded eligibility and funding.</td>
<td>Started in TEA-21 (FY 1999). SAFETEA-LU changes from Discretionary to Formula program</td>
<td>This is a NEW program under SAFETEA-LU</td>
</tr>
</tbody>
</table>

(Source: Federal Transit Administration)
Appendix B: Detroit Population Map

Aging Population (Age 65+) in Detroit Metropolitan Area

Legend
City Populations: 65 yrs. +
0 - 5000
5000 - 10000
10000 - 15000
15000 - 20000
20000 - 25000
25000 - 30000
Remaining Aging Pop. per County
15006 - 21396
21397 - 27326
27326 - 32936
32936 - 38261
38261 - 45234
45234 - 61234
61234 - 57173
57173 - 60143

Source: American Community Survey 2007

By Omri Kanitimm
GMU Transportation Policy Program
Practicum Spring 2009
Appendix C: Phoenix Population Map

Aging Population (65+ Yrs) in Phoenix Metropolitan Area

Legend
Aging Population
1 - 5000
5001 - 10000
10001 - 15000
15001 - 20000
20001 - 30000
30001 - 40000
40001 - 80000
80001 - 120000
Smaller towns
County Border

Source: American Community Survey, 2005-2007
U.S. Census

Map by Chris Kramer
GWW School of Public Policy
Transportation Policy Practicum, Spring '09

0 5 10 20 30 40 Miles
Appendix D: Washington, D.C. Population Map
Beyond 50.05, A Report to the Nation on Livable Communities: Creating Environments for Successful Aging. AARP (Washington, D.C.; 2005)

The State of 50+ America. AARP (Washington; D.C., 2006)

Good as Gold Senior Programs & Services. AATA (Ann Arbor, MI; 2009), accessed May 5, 2009; available at: http://theride.org/goodasgold.asp

Programs & Service AATA (Ann Arbor, MI; 2009), accessed May 5, 2009; available at: http://theride.org/aride.asp

PTMS Reports (1999-2008). AATA (Ann Arbor, MI; 2009)


Britz, Douglas (Director), LETS (Howell, MI; 2009); Interview: March 26, 2009


Gardiner, Jay (Senior Planner), SMART (Detroit, MI; 2009); Interview: April 1, 2009

Jones, Leroy (Director of MetroAccess), WMATA (Washington, D.C.; 2009); Interview: April 4, 2009
Kapanowski, Cindy (Dispatch/Driver), LETS (Howell, MI; 2009); Interview: March 24, 2009

Leggett, Isiah. *Transportation Options for Persons With Disabilities: Traveling To, From and around Montgomery County, MD.* Montgomery County (Rockville, MD; 2009); available at: http://www.montgomerycountymd.gov/content/hhs/ads/PDFs/transportationoptionsforseniorsandpwd.pdf

_Fares._ LETS (Howell, MI; 2009), accessed May 5, 2009; available at: http://www.co.livingston.mi.us/lets/fares.htm

_FAQs._ LETS (Howell, MI; 2009), accessed May 5, 2009; available at: http://www.co.livingston.mi.us/lets/faqs.htm

*PTMS Reports (1999-2008).* LETS (Howell, MI; 2009)

About Special Transportation Services. Maricopa County Human Services Department (Phoenix, AZ; 2009), accessed April 12, 2009; available at: http://www.hsd.maricopa.gov/sts/

Population Concentration Age 60 and Over Map. Maricopa Association of Governments (Phoenix, AZ; 2009); Available at: http://www.mag.maricopa.gov/details.cms?item=2605


Transit Services (Montgomery County Budget FY 2007). Montgomery County (Rockville, MD; 2008); available at: http://www.montgomerycountymd.gov/content/omb/FY07/appr/vol1/transit.pdf

Transit Services (Montgomery County Budget FY 2010). Montgomery County (Rockville, MD; 2009); available at: http://www.montgomerycountymd.gov/content/omb/FY10/psprec/PDFs/transit.pdf

Access NTD Data.  (FTA NTD, Rockville, MD; 2009); available at: http://www.ntdprogram.gov/ntdprogram/data.htm

Meeting the Transportation Needs of Northern Virginia’s Seniors: Recommendations For Public Transit Systems and Other Mobility Providers.  Northern Virginia Transportation Commission (Arlington, VA; 2006); available at: http://www.thinkoutsidethecar.org/pdfs/SeniorMobility/Senior%20Mobility%20Final%20Report%202006.pdf

Oberlink, Mia R., Opportunities for Creating Livable Communities.  AARP (Washington, D.C.; 2008)

Schenck, Arlene (Field Operations Supervisor), Maricopa County Special Services (Phoenix, AZ; 2009); Interview:  April 6 2009


Employment by Sector.  SEMCOG (Detroit, MI; 2009), accessed May 5, 2009; available at: http://semcog.org/Data/bysubject.cfm

Community Transit Partnerships (Excel Sheet).  SMART (Detroit, MI; 2009)

PTMS Reports (1999-2008).  SMART (Detroit, MI; 2009)

SMART Community Services.  SMART (Detroit, MI; 2009), accessed May 5, 2009; available at: http://www.smartbus.org/Smart/Ride+SMART/Services+by+Community/


Tempe in Motion.  Temple in Motion (Temple, AZ; 2009), accessed April 2, 2009; available at: http://www.tempe.gov/Tim/

Tierney, Susan (Public Information Officer), Valley Metro (Phoenix, AZ; 2009); Interview:  April 13, 2009

Parking and Transportation Services.  University of Michigan (Ann Arbor, MI; 2009), accessed May 5, 2009; available at: http://pts.umich.edu/taking_the_bus/routes/


State and County QuickFacts: Maricopa County, AZ. U.S. Census Bureau (Washington, D.C.; 2009), accessed April 1, 2009; available at: http://quickfacts.census.gov/qfd/states/50000.html


White, Chris (Manager of Service Development), AATA (Ann Arbor, MI; 2009); Interview: April 15, 2009


County Eyes Suspending Free Bus Service For Seniors, Disabled. WTOP (broadcast: March 31, 2009); available at: http://www.wtop.com/?nid=25&sid=1637427