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# TOTAL MOBILITY SCHEME

## policy guide for local authorities





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**NZ Transport Agency**

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# 1 INTRODUCTION

## 1.1 Purpose

The purpose of this guide is to achieve a nationally consistent approach for local authorities to administer the Total Mobility scheme in their respective regions.

This guide sets out the requirements, policy, principles, processes and explanatory notes to manage the Total Mobility scheme.

## 1.2 Background and context

The Total Mobility scheme is one of the mechanisms by which the NZ Transport Agency (the Transport Agency) fulfils its responsibilities towards assisting the transport disadvantaged. Its origins date back to 1981.

Funded in partnership by local and central government, the Total Mobility scheme assists eligible people, with long term impairments to access appropriate transport to meet their daily needs and enhance their community participation. This assistance is provided in the form of subsidised door to door transport services wherever scheme transport providers operate. The Total Mobility scheme is intended to compliment the provision of public transport services, which are expected to be as accessible as possible to meet different mobility needs.

The last comprehensive review of the Total Mobility scheme was in 2005 and was undertaken by the Ministry of Transport. The implementation of its recommendations has since been the focus of the Transport Agency and regional councils. Since that review no substantive changes have been made. This latest edition provides greater clarity and explanation on the application and use of the scheme.

## 1.3 Roles and responsibilities

This guide was developed to assist regional council's total mobility coordinators and their team members, responsible for administering the Total Mobility scheme. It is important to note the roles and responsibilities of central and local governments within the Total Mobility scheme:

### Ministry of Transport

The Ministry of Transport (MoT) is responsible for setting the Total Mobility policy, including its funding source. The MoT also leads the policy settings about the use of funds from the National Land Transport Fund, and the co-funding arrangements with local government.

### NZ Transport Agency

The Transport Agency is responsible for the operational administration of the Total Mobility scheme, working with regional councils to administer and fund the scheme within their total provision of public transport services.

### Local authorities

Regional councils (and Auckland Transport (AT)) administer the Total Mobility scheme in their respective regions, and contract and co-fund Total Mobility services as part of their provision of regional public transport services.

## 1.4 Transport Agency's expectations of local authorities

As a co-investor of the Total Mobility scheme, the Transport Agency has expectations of regional councils to administer the Total Mobility scheme effectively. Regional councils (and AT) must ensure the scheme's central tenet is delivered and policies are applied. It must be done by using systems and processes and managing the third party relationships effectively and efficiently. Regional councils should, by delivering the scheme, be able to demonstrate:

- consistent and robust administration
- being cost conscious and encouraging competition
- use evidence-based decision-making
- ensure ongoing risk management
- transparent and accountable processes and decisions.

The Transport Agency expects regional councils' processes to be consistent with the guidelines in this document.

## 2 TOTAL MOBILITY SCHEME

### 2.1 How does the Total Mobility scheme work?

The scheme is funded out of the public transport activity class of the National Land Transport Fund (NLTF) in partnership with local government's regional rates. The provision of the scheme is consistent with the Land Transport Management Amendment Act 2013, which requires local government to consider the needs of transport-disadvantaged people when preparing any land transport programme and funding requirement.

The scheme provides a subsidy per trip of 50 percent, up to a maximum fare, to assist eligible people, with long term impairments to access appropriate transport to meet their daily needs and enhance their community participation.

### 2.2 Scheme purpose

**Funded in partnership by local and central government, the Total Mobility scheme assists eligible people, with long term impairments to access appropriate transport to meet their daily needs and enhance their community participation.**

This assistance is provided in the form of subsidised door to door transport services wherever scheme transport providers operate. The Total Mobility scheme is intended to compliment the provision of public transport services, which are expected to be as accessible as possible to meet different mobility needs.

### 2.3 Central tenet

The scheme is founded on the central tenet that people with impairments who are unable to use buses, trains or ferries as a result of their disability, should be assisted with a subsidised alternative by local and central government. This reflects the legislative requirement under the Land Transport Management Act 2003 for local and central government to consider the needs of persons who are transport disadvantaged.

The scheme is primarily a transport service, and is no more a social, health or disability service than any other type of transport service. Any person would be at risk of social isolation and adverse health outcomes if they did not have adequate access to appropriate transport. The scheme provides its members with access to transport and the means to participate in their communities in whatever way they choose.

### 2.4 Parameters

The following elements clarify the limits of service provision within a finite budget. These parameters are already consistent with common practice:

- provision of subsidised transport assistance to people with impairments
- provision of a transport alternative through a subsidised door-to-door transport service
- limited amount of subsidised transport assistance available
- limited to areas where Total Mobility scheme transport providers operate
- subject to nationally consistent eligibility criteria
- subject to some regional variation of entitlements to reflect local differences.

## 3. ELIGIBILITY

### 3.1 General eligibility criteria

An eligible person must have an impairment that prevents them from undertaking any one or more of the following five components of a journey unaccompanied, on a bus, train or ferry in a safe and dignified manner:

- Getting to the place from where the transport departs.
- Getting onto the transport.
- Riding securely.
- Getting off the transport.
- Getting to the destination.

These journey components are consistent with the approach outlined by the Human Rights Commission, which describes an accessible journey as follows: 'for a person to get from their home to a destination and then home again requires a number of linked steps. All these steps are of equal importance. If one link is broken or inadequate, the whole journey becomes impractical' (Human Rights Commission, 2005).

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

Total Mobility schemes may operate in areas that have Total Mobility transport operators, but not buses, trains or ferries. In the case of such areas without a public passenger transport system, eligibility must be determined with reference to hypothetical rather than actual journeys. If hypothetical journeys are used, an uncomplicated commonsense approach should be able to ascertain eligibility.

People who meet the criteria for the Total Mobility scheme and have an impairment that has lasted, or is expected to last, for six months or more that prevents them from being able to undertake any one of the specified components of a journey, are eligible for the Total Mobility scheme.

### 3.2 Eligibility and fluctuating need

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

This is intended to cover situations where an impairment is fluctuating (eg epilepsy), or the impairment is constant and non-fluctuating but is affected by environmental changes (eg people with a visual impairment that makes independent travel at night difficult). This may also include people with impairments (such as Alzheimer's) that restrict travel on buses, trains or ferries to very familiar routes.

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

Where practical, a scheme user should be encouraged to use public transport.

### 3.3 Eligibility and duration of impairment

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

A person whose impairment is permanent and who meets the criteria is eligible for Total Mobility. A person who has an impairment that has already lasted for six months or more may be considered eligible (provided they meet the criteria). Whether the impairment is expected to last another six months is immaterial to the person's eligibility and does not imply a six-month stand-down period before a person can become eligible for Total Mobility.

### 3.4 Eligibility of children

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

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

It is not intended that the scheme should be a substitute for transport services that are the responsibility of other government agencies, such as the Ministry of Education, which is responsible for all school-related travel.

### 3.5 Eligibility of people in residential care

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

The scheme is available to people who live in rest homes to support their independent participation in the community. This may be to visit friends or family, to go shopping.

It is not intended that the scheme should be a substitute for transport services that are the responsibility of the rest home provider, or be used by the rest home to provide transport for organised activities. For example, rest home providers are responsible for meeting the cost of transporting residents for stipulated health and medical services, including needs assessment and service coordination services, laboratory services, radiological services, dental services, specialist medical services and podiatry services.

While rest home providers must ensure that residents also have access to services such as advocacy services, voluntary organisations (eg Stroke Foundation) and socialisation outside the residential facility, they are not responsible for meeting the costs of transport for these.

### 3.6 Applying the eligibility criteria

When undertaking an assessment of a prospective client (or, in some instances, with the aid of an authorised representative) the following criteria need to be applied:

- An impairment may be physical, psychological, neurological, intellectual, sensory or other.
- It is not the impairment itself that determines eligibility for Total Mobility – rather, it is the effect that the impairment has on the individual's ability to undertake the components of the journey.
- It must be the impairment that prevents the individual from undertaking the journey, not any other reason, for example:
  - » having too much shopping to take on the bus
  - » preferring taxis rather than buses
  - » not having a public transport route nearby.

- 'Safe' generally means 'free from harm or danger'. In the Total Mobility context, examples of 'unsafe' might include:
  - » a component of the journey causing an increase in the risk of a significant deterioration in the person's condition (eg epileptic seizure or breathing difficulties)
  - » a component of the journey exposing the person's impairment-related vulnerabilities to possible exploitation (eg vulnerabilities related to an intellectual or psychiatric impairment)
  - » a component of the journey (eg getting on to or off the transport) being risky for the person to attempt, because of their impairment.
- 'Dignified' generally means in a manner that does not bring disrespect or humiliation. In the Total Mobility context, examples of 'undignified' might include:
  - » a person depending on help from a stranger (who may or may not agree to help)
  - » a person's impairment-related vulnerabilities being unduly exposed
  - » a person being expected to get on to or off the transport in a way that compromises their dignity (eg crawling).

A medical certificate is not required to establish eligibility for Total Mobility, and should not be required as part of the eligibility assessment. It is not the impairment itself that determines eligibility, but whether the impairment prevents the prospective client from undertaking the journey. However, if the impairment is not clearly evident to the assessment facilitator, then a medical certificate may be requested.

### 3.7 Ascertaining eligibility for the Total Mobility scheme

A key role for the Total Mobility assessment facilitator is to work with the prospective Total Mobility client to determine whether that person meets the eligibility criteria for the Total Mobility scheme.

If a prospective Total Mobility user meets the eligibility criteria, they must be recognised and accepted as eligible. Eligibility then entitles the client to receive subsidised transport assistance via the Total Mobility scheme.

It should be noted that Total Mobility assistance will not be provided for travel that is already funded. Scenarios involving part or full funding from other sources may be as follows (all examples are for people who meet the eligibility criteria for Total Mobility):

- **Person A** receives funding for 100 percent of their transport costs. They cannot also receive Total Mobility assistance.
- **Person B** receives 100 percent funding for specified travel from another source, but no funding for other discretionary travel. They can receive Total Mobility assistance for that travel that is not funded from another source.
- **Person C** receives funding for half the fare. They can receive Total Mobility assistance to cover the other half.
- **Person D** receives no other travel funding. They can receive Total Mobility assistance for half the fare up to the regionally defined cap.

### 3.8 Reassessment of eligibility

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

People who are currently on the Total Mobility scheme do not need to have their eligibility reassessed, although local authorities may choose to reassess to ensure the effectiveness of the service being provided.

If a client has a permanent impairment, they should only be assessed once, unless there is a significant change in their condition that may affect their eligibility for Total Mobility.

A scheme user's eligibility only needs to be reassessed in the case of temporary/finite-term impairments (see section 3.3). In the case of temporary impairments, a timeframe for reassessment should be indicated, appropriate to the individual's circumstances. In some instances, the expected duration of the impairment may be difficult to predict, eg recovery from stroke or head injury. The due date for reassessment should be negotiated between the client and the assessment facilitator, with regard to what might reasonably be expected.

Reassessing a scheme user's eligibility is at the discretion of the local authority (regional councils and AT) particularly if significant changes to either the user's condition or where the region's transport services have made journeys more accessible.

### 3.9 Travel on public transport services

Where practical, a scheme user should be encouraged to use public transport as Total Mobility is a component of a local authority's public transport network.

Total Mobility should be aligned to the wider public transport approach. The promotion of accessible public transport (ie kneeling buses) as an alternative to using Total Mobility should be explored by local authorities.

### 3.10 Customer terms and conditions

Local authorities must ensure the expectations of Total Mobility scheme users are clearly defined by ensuring a cohesive set of terms and conditions of use are developed and circulated to users of the Total Mobility scheme. Consideration should be given to the following when developing these terms and conditions:

- Intent of the scheme.
- Eligibility and use of card/vouchers.
- General terms.
- Standard conditions of use.
- Circumstances of potential breach of use.

## 4. ENTITLEMENT

### 4.1 Standardised subsidy

The fare subsidy for the Total Mobility scheme is set at 50 percent off the standard fare charged by the transport operators.

### 4.2 Purpose of trip

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

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

It is not intended that the scheme should be a substitute for transport services that should more appropriately be the responsibility of other government agencies, such as those in the health sector or by the Accident Compensation Corporation (ACC).

### 4.3 No town boundary restrictions

Users of the scheme should not be confined to travel within town boundaries. Any regional restriction disadvantages those who wish to travel in or to a destination that is just outside a town boundary and could 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 significant issue for those living in small provincial or country towns.

### 4.4 Extending the Total Mobility area

Local authorities are encouraged to investigate the possibility of contracting transport 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 transport services in areas where there is no Total Mobility scheme provided. Extending the scheme into these areas should be investigated by the local authority if there is a current unmet need.

This does not mean that there must be a Total Mobility service operating in every rural area in each region, but if a transport operator is operating in an area where there is no Total Mobility service expresses an interest in providing one, then the local authority should investigate contracting its services. Similarly, a local authority may initiate the extension of the Total Mobility scheme into areas where there is both an unmet need and a willing potential operator.

### 4.5 Maximum subsidised fare

Local authorities determine maximum subsidised fares for the Total Mobility scheme in consultation with the Transport Agency. Local authorities will review them at least every three years.

The maximum subsidised fare needs to reflect the purpose of the total mobility scheme, it is important that they are established at a level that is adequate and appropriate for each town/region operating a Total Mobility service.

At a minimum the maximum fare in each region should be reviewed every three years to ensure that these fares take into account increases in tariff rates, fuel prices etc. When fares are reviewed, the following information may be helpful in determining a reasonable maximum fare:

- Average cost per trip.
- Average subsidy.

- Historical maximum and average fare data.
- Current and historical usage of the scheme.
- Distance and time based travel factors.
- Benchmarking fares from similar regions.
- Relevant demographic data.
- Congestion.
- Customer satisfaction survey.

This information is intended to assist local authorities with developing a simplified method of reviewing the maximum subsidised fare which could be undertaken annually as part of a monitoring procedure.

## 4.6 No minimum fare

The Total Mobility scheme has no minimum fare threshold.

Any minimum fare penalises scheme members who only make short trips. The policy of one transaction per trip applies.

## 4.7 Trip allocation criteria

Local authorities are encouraged to consider the following when allocating Total Mobility trips:

- The needs of the individual user.
- Budget constraints of the council.
- Alignment with other regions' methods of trip allocation.

These criteria are intended to ensure that the level of trip allocation is adequate to reflect the scheme's purpose, and is reasonably consistent with the allocation level provided in other regions.

A majority of local authorities already take into account the needs of the user when allocating trips either by having no limit on the number of trips a user can make or by allowing users to request more trip vouchers if their initial allocation is insufficient. Local authorities that strictly limit the number of trips a user is given will need to adopt a more flexible approach.

## 4.8 Group travel

For personal group trips that are not a formal 'organised' activity, for example, a family going out on a social trip together, it is not necessary for all passengers to be Total Mobility scheme users. There is no limit on the number of passengers that can accompany a Total Mobility scheme user on a personal trip, but the Total Mobility scheme user must be in the vehicle for the duration of the trip, and the trip must be for the direct benefit of the Total Mobility scheme user. Therefore, it is not acceptable for a Total Mobility scheme user to be taken along on a trip simply so the other passenger/s can get a cheaper taxi ride.

If the Total Mobility scheme user leaves the vehicle and the trip continues with only non-card holders, the Total Mobility subsidy would not apply for the rest of the trip. In this case the Total Mobility card should be swiped before the Total Mobility scheme user leaves the vehicle and then a normal unsubsidised trip would begin.

This can be difficult for drivers to judge or to enforce, so it is important to inform a client at the time of the eligibility assessment. Local authorities should cover this in Total Mobility scheme user terms and conditions.

## 4.9 Inter-regional travel

Total Mobility scheme users can access the Total Mobility scheme where it operates throughout New Zealand. There is variability between local authorities as a mixture of electronic cards and paper-based vouchers are used for Total Mobility travel.

Scheme users who have obtained an electronic card must use this in all regions where electronic Total Mobility cards are available. Where a voucher system is currently operating, the Total Mobility scheme user must present proof of ID and a relevant out of town travel voucher.

Local authorities need to include on their out of town travel voucher the following as a minimum requirement:

- Trip date
- Customer name
- Unique customer number
- Pick-up location
- Pick-up time
- Drop-off location
- Drop-off time
- Unique voucher number
- Vehicle ID
- Driver ID
- Total fare
- Amount paid by customer
- Hoist indicator
- Number of passengers
- Operator name.

## 5. ASSESSMENT SERVICES

### 5.1 Contract with assessment agencies

Local authorities must enter into contracts with assessment agencies. The role of the assessment agency, and assessment facilitator, is to ascertain whether a person with impairments is eligible for the Total Mobility scheme. The role is one of guiding, assisting and confirming that the information given by the prospective scheme user is accurate.

The role of the assessment facilitator helps to ensure that people who meet the eligibility criteria for Total Mobility get access to Total Mobility trips appropriate to their needs.

Consideration should be given to the following when developing these contracts:

- Appointing an assessment facilitator
- Scope of assessments
- Undertaking assessments
- Conflicts of interest
- Data collection for administrative records
- Assessment facilitator responsibilities
- Local authority obligations
- Audit requirements
- Confidentiality
- Use of administrative system
- Fees (if applicable)
- Health and safety
- Disputes resolution
- Termination.

More information on service quality and performance management, supply of vouchers and/or electronic cards and attendance at meetings may also be added if required.

### 5.2 Training for agency assessors

It is up to each local authority to ensure appropriate training is provided to assessors to assist in the consistent application of the eligibility criteria. The local authority will determine who will conduct the training. It may be that one of the existing Total Mobility assessment facilitators is appointed as 'Chief Assessor' and made responsible for training new assessors as they are appointed and for conducting the periodic 'refresher' training sessions for more experienced assessment facilitators. Another option is for the Total Mobility coordinator to facilitate training sessions for all agencies/facilitators that provide Total Mobility assessments in their region.

Training requirements are outlined below:

- initial training for new assessment facilitators (to be completed prior to conducting any Total Mobility assessments)
- ongoing training through attendance training workshops at least once a year (or as otherwise specified by the local authority)
- the cost of providing the training will be financially assisted by the NZ Transport Agency at the local authority's funding assistance rate through work category 517: Total Mobility operations.

## 5.3 Estimating client trips

The self-assessed needs model for Total Mobility centres around the fact that each individual's need for trips is unique to them and their particular situation. The role of the 'assessor' is to guide the individual Total Mobility client through the process, and to help them request a number of trips that realistically matches their need.

The purpose of travel is irrelevant to this entitlement.

Note: the assessment facilitator does not have a role in 'rationing' trips. The important thing is to have realistic requests, so that the client's request doesn't leave them in a position where they do not have enough trips. Neither should they end up with a surplus of allocated trips that they have no need for.

## 5.4 Financial contribution to assessment agencies

The Transport Agency funding policy allows regional authorities to support assessment agencies through their existing administration budgets, and to receive financial assistance from the Transport Agency. A local authority needs to consider the following funding principles for financial contributions to assessment agencies:

- Assessment agencies have an important role to play in supporting the Total Mobility scheme.
- Any funding arrangements should involve a contribution from local government, the Transport Agency and users.
- Regional authorities should, but are not required, to make a funding contribution to assessment agencies.
- The Transport Agency's contribution will be no more than \$15 per user per annum.
- Funding is available through the Total Mobility administration activity class.
- This financial support should be used to support assessment agencies to conduct Total Mobility eligibility assessments, distribute vouchers and/or cards and undertake associated administrative tasks.
- Applications for financial assistance from assessment agencies will be considered by local authorities on a case-by-case basis.

## 5.5 Access to voluntary disability sector agency

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

It is important that potential Total Mobility scheme members have access to at least one relatively low-cost (or no-cost) assessment agency in their region. Voluntary disability sector agencies play a vital role in supporting the scheme by providing these services at little or no cost to the applicant.

In regions where general practitioners are the most prevalent assessment facilitators, there must be at least one voluntary disability sector agency/facilitator in each region that can provide a Total Mobility assessment for potential members who do not wish to go to a doctor. This may be in the form of a recognised disability sector agency or an independent assessor employed by the local authority to undertake Total Mobility assessments.

## 6. TRANSPORT OPERATORS

### 6.1 Contracts with transport operators

Local authorities must enter into contracts with individual transport operators providing Total Mobility services in their region. Consideration should be given to the following when developing these contracts:

- General conditions
- Contract term and termination
- Health and safety of employees
- Safety of passengers
- Resolutions of disputes
- Audit provision
- Fare schedules
- Licensing requirements
- Complaints
- Rules of operation
  - » Fares
  - » Electronic card rules
  - » Invoice and payments
  - » GPS tracking data
- Safety standards
- Driver training
- Use of administrative system
- Confidentiality and privacy
- Hours of service
- Indemnity
- Variations to contract.

### 6.2 Private hire and volunteer organisations

Private hire and volunteer organisations are entitled to become transport operators of the Total Mobility scheme provided the local authority's criteria for joining the scheme is met. As with other transport services, operators will be required to meet legal licensing requirements and have appropriate contracts with the relevant local authority.

Operator licensing requirements can be found here: <http://nzta.govt.nz/commercial-driving/taxis-shuttles-buses-and-other-passenger-services/new-passenger-service-rules-2017/>

### 6.3 Wheelchair accessible vehicles

A wheelchair accessible vehicle is used to transport Total Mobility scheme users who are unable to get in and out of a vehicle without the use of a hoist or ramp. Local authorities are required to ensure this information is obtained during the assessment of a potential client.

Wheelchair hoists are intended for the purpose of lifting people that are appropriately restrained in their wheelchair during operation, including being lifted in the vehicle and while being transported. All Total Mobility passengers who are lifted into and transported in a hoist vehicle must be restrained at all times with either a harness belt, lap belt or lap-sash belt to ensure the health and safety of the Total Mobility passenger.

If a Total Mobility scheme user is able to be safely restrained while using a wheelchair accessible vehicle then a flat rate payment can be claimed for people who use wheelchairs, walking frames or other mobility devices who reasonably require the use of a hoist to get in and out of the vehicle.

### 6.3.1 Wheelchair hoist fee (flat rate payment)

The Transport Agency encourages adequate provision of wheelchair-accessible vehicles by providing a flat rate payment (in addition to the fare) to the transport operator for each trip taken by a Total Mobility scheme passenger using a wheelchair hoist.

A flat rate payment of \$10 (excluding GST) is to be paid to Total Mobility transport operators for each Total Mobility trip that requires the use of a wheelchair hoist because the customer is unable to transfer in and out of the vehicle independently. The payment is fully funded by the Transport Agency and transport operators in all regions are eligible for this payment. This flat rate payment is captured through the Work category 521: Total Mobility flat rate payments which are designated specifically for flat rate payments, with a 100 percent financial assistance rate.

The objectives of the flat rate payment are to:

- increase the financial viability of operating wheelchair-accessible vehicles in recognition of the vital part they play in meeting the needs of the transport disadvantaged
- increase the availability of such services to Total Mobility users at peak times
- encourage industry to provide an adequate number of wheelchair-accessible vehicles.

Although this payment is fully funded by the Transport Agency, the assistance of local authorities is required to administer the payment to Total Mobility transport operators, as legislation prevents the Transport Agency from making payments from the National Land Transport Fund directly to transport operators.

In order to claim this payment, Total Mobility transport operators must agree to both of the following conditions:

- The fare meter will not operate while Total Mobility passengers are being loaded into and out of the vehicle.
- The flat payment will be passed on to the owner of the vehicle if the vehicle is not owned by the operator.

These conditions must be specified in contracts between the local authority and each Total Mobility transport operator, or agreed to in a separate flat payment contract between the two parties, before the transport operator will be eligible for the payment and before the Transport Agency will accept payment claims from the local authority.

In order to process the payment for wheelchair-assisted Total Mobility trips, local authorities will need to be able to distinguish between hoist and non-hoist trips. Claims made for the payments will need to be verified as part of the Transport Agency's regular procedural audit function.

### 6.3.2 Criteria for eligibility for wheelchair hoist fee

To be eligible for this flat rate payment through the Work category 521: Total Mobility flat rate payments, the following criteria must be met by the transport operator:

- the transport operator must be contracted by the local authority to provide Total Mobility transport services
- the fare meter must not operate while Total Mobility passengers are being loaded into or out of the vehicle
- Total Mobility scheme users who cannot transfer in and out of a wheelchair independently and cannot get into a vehicle without the use of a hoist or ramp
- only one payment may be claimed for each trip taken by a Total Mobility scheme user using the wheelchair hoist (the payment is for each passenger carried per trip), and
- the transport operator must pass the payment on to the owner of the vehicle if the vehicle is not owned by the transport operator.

### 6.3.3 Safety standards for a wheelchair accessible vehicle

All wheelchair hoists (and/or ramps) must be inspected and certified as safe for use by an approved engineer of low volume vehicles, and the hoists (and/or ramps) must be maintained at certificate of fitness standard at all times.

All Total Mobility passengers who are transported in a wheelchair in a hoist vehicle must be restrained with one of the following:

- harness belt
- lap belt
- lap-sash belt.

All practicable attempts to secure passengers travelling in a wheelchair in a hoist vehicle will be made. However, drivers will not be permitted to carry any passengers who refuse to wear the appropriate seatbelt.

## 6.4 Driver training

Each new driver should be provided with Total Mobility induction explaining the essential elements of Total Mobility services prior to being fully trained in the courses set out below. The transport operator will ensure that all drivers have been trained in:

- NZQA unit standard 1748 (Passenger service: demonstrate skills required to assist passengers with special needs), and/or
- a council-approved training course to an equivalent standard.
- The transport operator will ensure that all drivers whose vehicles are equipped with hoists or ramps are trained in:
- NZQA unit standard 1748 (Passenger service: demonstrate skills required to assist passengers with special needs), and
- NZQA Unit Standard 15165 (Transport passengers in wheelchairs using Total Mobility vehicles equipped with hoist or ramp), or
- Regional Council-approved training courses to an equivalent standard.

A driver register should be provided to the local authority annually (or at an agreed period between the transport operator and the local authority) to verify this training has occurred.

## 6.5 Driver terms and conditions

Local authorities should ensure the expectations of transport drivers are clearly defined by ensuring a cohesive set of terms and conditions are developed and circulated to all drivers operating the Total Mobility scheme. Consideration should be given to the following when developing these terms and conditions:

- Driver declaration
- General terms
- Requirements prior to undertaking a Total Mobility trip
- Accepting and processing vouchers and/or electronic cards
- Completing and recording the trip
- Payment of hoist fees
- Carriage of Total Mobility scheme users including from other regions.

# 7. ADMINISTRATION AND MONITORING

## 7.1 Data and monitoring

To ensure the efficacy and ongoing viability of the Total Mobility scheme, the Transport Agency must undertake monitoring of current demand and consider future demands on the scheme. Information relating to Total Mobility trips and the costs associated with providing the trips will need to be verified as part of the Transport Agency's regular procedural audit function.

## 7.2 Achievement returns

Monthly and annual achievement reports are submitted using the Transport Agency's Transport Investment Online (TIO) tool.

Currently regions submit achievement returns using the TIO tool. This records patronage and financial claims. While this data enables some Total Mobility trends to be monitored, it does not provide a sound basis for policy decisions.

Local authorities should collect information which could assist with analysing trends and be able to be shared with the Transport Agency. This could include:

- Client data
  - » Number of active clients
  - » Number of clients requiring the use of the wheelchair hoist
  - » Age and gender of client
  - » Nature of the impairment (physical sensory, intellectual, neurological)
  - » Number of clients who can use public transport some of the time.
- Transport operator data
  - » Number of providers by type (taxi, private hire, voluntary)
  - » Number of wheelchair hoist vehicles
  - » Average age of wheelchair host vehicles/hoists
  - » Number of providers who been removed from the scheme due to contract breaches/misconduct.
- Assessment agency data
  - » Number of assessment agencies – assessment agency contracts
  - » Cost of assessment/membership of assessment agency - assessment agency contracts.
- Financial performance
  - » Subsidy (Transport Agency and local share)
  - » Maximum fare subsidy
  - » Percentage of trips higher than the maximum fare subsidy
  - » Number of trips
  - » Costs/number of hoist replacements
  - » Number of wheelchair hoist flat payments
  - » Number of wheelchair hoist trips (ie How many hoist trips carried more than one passenger).

## 7.3 Customer satisfaction surveys

Customer satisfaction surveys performed to determine the service quality that is provided, from the perspective of Total Mobility scheme users. What the Transport Agency needs to know is that the service provided is safe, comfortable, affordable and any improvements which may improve the Total Mobility scheme. This information can be obtained by customer user surveys and can be tracked over time and reported every three years.

# APPENDIX 1

## Total Mobility review phase 1 and 2 criteria

### Phase 1 criteria

The following people should be included if they meet the eligibility criteria:

- People with impairments who meet eligibility for TM some of the time.
- People with an impairment that has lasted or is expected to last six months or longer.
- Children.
- People who live in residential care.
- The Transport Agency's *Total Mobility scheme: policy guide for local authorities*.
- The minimum fare threshold has been removed.
- There are no restrictions on the purpose of the trip.
- The fare subsidy is always 50 percent.

### Phase 2 criteria

- A process is in place to make sure the maximum fare subsidy will be reviewed every three years – check when it was last reviewed.
- The maximum fare subsidy (as above) has been applied.
- There are no town boundary restrictions.
- The needs of users, budget constraints and other region's approaches are considered when allocating vouchers.
- Contracts with assessment agencies have been implemented.
- Assessment training has been conducted with the all assessors – and plans are in place to continue with assessment training.
- Potential users can be assessed by a voluntary disability sector agency.
- Contracts with transport providers have been implemented/ signed.
- Investigations – Are there areas in your region where taxis operate that don't currently provide total mobility?