

COMMONWEALTH OF PENNSYLVANIA  
DEPARTMENT OF AGING  
Harrisburg, PA  
August 24, 1982

AGING PROGRAM  
DIRECTIVE #82-20  
85-07-1

SUBJECT: POLICIES FOR THE PROVISION OF TRANSPORTATION SERVICES  
BY AREA AGENCIES ON AGING

TO: EXECUTIVE STAFF  
DIVISION OF FIELD OPERATIONS  
AREA AGENCIES ON AGING  
PDA GRANTEEES AND CONTRACTORS  
PA COUNCIL ON AGING  
DPW, OFFICE OF POLICY,  
PLANNING AND EVALUATION  
PA ASSOCIATION OF CONSOLIDATED  
TRANSIT PROVIDERS  
PA ASSOCIATION OF MUNICIPAL  
TRANSIT AUTHORITIES  
PA TAXI AND PARATRANSIT  
ASSOCIATION  
PA DEPARTMENT OF TRANSPORTATION  
GOVERNOR'S OFFICE OF POLICY  
AND PLANNING

FROM: GORHAM L. BLACK, JR.  
SECRETARY  
DEPARTMENT OF AGING



DISPOSITION:  Note well and file for reference.  
 This APD replaces APD #81-6.

### Purpose

The purpose of this Aging Program Directive is to set forth Area Agency on Aging (AAA) requirements for the provision of transportation services for the elderly and to establish minimum operating policy standards for transportation services provided with Department of Aging funds. These policies apply to all transportation funds made available through the Department of Aging, whether they are in the form of special grants, contracts, or part of the Aging Services Block Grant.

### Section I - General Provisions

#### I.1 - System Design Requirements

Area Agencies on Aging are responsible for ensuring that transportation services are available to all eligible persons within the Planning and Service Area who have received priority for such services. AAA's must determine which type of trip (i.e., medical, center, shopping assistance, etc.) would be most appropriate for the assessed need of each client.

The primary emphasis for Area Agencies on Aging must be the utilization of existing local public transit services whenever possible. If possible and cost-effective, area agencies are to consolidate all transportation services within their Planning and Service Area into a comprehensive county or regional transportation system. Area Agencies on Aging are not permitted to fund independently-operated, non-coordinated transportation programs, operated by

themselves, senior centers or other agencies, which are providing services other than those outlined in Section I.3 c. of this APD, unless this can be shown to be the most appropriate and cost effective alternative. Instead, Area Agencies on Aging must support the development of a cost-effective coordinated system which can adequately serve the needs of agencies and individual older persons for whom the AAA is responsible. A coordinated transportation system may include any or all of the following aspects: centralized administration; a coordinated dispatching system; uniform insurance coverage; standard personnel practices; and the consolidation of maintenance and other operational elements which permit cost-effective, and efficient operations. Only when there is no other reasonable and cost-effective mode of transportation or where public transportation services cannot accommodate the need, may Area Agencies on Aging provide transportation services in a non-integrated fashion.

To achieve these policy objectives, AAA's must pursue the use of Section 406 or Section 203 funds under Act 101-1980. They must actively encourage the development of a comprehensive and coordinated transportation services network funded through all available resources which may include Lottery funds, special grants, and public transportation funds.

## I.2 - Definitions

### a. Passenger Service Designs

1. Exclusive ride services - transportation provided in which the first person boarding the vehicle directs the travel course of that vehicle until exiting the vehicle. Usually provided in a demand responsive mode which requires limited advance notice such as with taxicab service.
2. Shared ride services - transportation provided on a non-exclusive, pre-arranged basis, in which the first passenger(s) boarding the vehicle may not restrict the use of the vehicle from others.

### b. Service Delivery Methods

1. Fixed route service - service rendered on a regular non-exclusive basis in which vehicles are operated over an established course usually according to an established time schedule.
2. Variable route service (fixed route with deviation) - the provision of transportation between specified points along a defined course, from which the driver may deviate to accommodate specific requests for transportation.

### c. Service Scheduling

1. Demand responsive - any mode of transportation which is provided upon request of the passenger which involves service scheduling and routing based upon that request.
2. Advance reservation - a form of demand responsive service in which requests for transportation services are made at least 24 hours in advance of service being provided.

d. Operational Designs

1. Integrated transportation services - an operational design intended to improve vehicle utilization, reduce duplication and improve economy in the cost of operations through combining various routes and services. Such services involve transporting a variety of individuals of different identifiable groups with different trip purposes utilizing the same vehicles possibly at the same time. This service may be provided only to human service ridership or may include the mixing of human service with general public ridership.
2. Non-integrated transportation services - a vehicle operations design in which transportation services are furnished independently of other transportation routes and services being provided in the same mode or area. Such a design tends to involve the operation of numerous, separate, individualized transportation service systems for each different identifiable group often in duplicative fashion.

e. Fare Payment Options

- 1.. Free fare program - a system of shared ride, demand responsive transportation service provision used in conjunction with services funded through Section 406 or Section 203 of Act 101-1980 which requires no payment of fares by passengers 65 years of age and over. Providers of such services may receive up to 75% of the fare reimbursed through Section 406 or Section 203. The remaining 25% (or 25¢ whichever is greater) of the fare is paid by a third-party, possibly an AAA.
2. Reduced fare program - a system of shared ride, demand responsive transportation service provision used in conjunction with services funded through Section 406 or Section 203 of Act 101-1980 which requires partial payment of the fare to be made by passengers 65 years of age and over.

f. Organizational Structures

1. Consolidated Transportation System - an organizational design in which transportation services are delivered by one centrally administered and uniformly operated organization in which all functions of operating and providing transportation services are managed and controlled by that entity.
2. Coordinated Transportation System - a system in which the various functions required to provide transportation services are arranged in a concerted and cooperative manner among various agencies but not necessarily managed or controlled by a centralized agency or administration.

### I.3 - Service Activities

Area Agency transportation activities may include but are not limited to:

- a. Providing information on available public and private transportation services through the use of inventories of existing transportation providers, services and fares.
- b. Arranging for transportation by:
  1. Providing tokens, passes or scrip to senior citizens, on an individual basis, to cover the fare for public or private transit services where such fares are not funded through the Free Transit Program for Senior Citizens on fixed routes.
  2. Establishing free fare or reduced fare shared ride demand responsive programs by utilizing Lottery revenues available through Section 203 and Section 406 of Act 101-1980.
  3. Providing volunteer or paid escorts to accompany and assist older persons to and from needed services.
  4. Coordinating the recruitment, training and use of volunteers to provide transportation services by driving their personal vehicles or agency-owned vehicles.
- c. Providing transportation services by:
  1. Entering into contractual agreements with providers of integrated transit services. Area Agencies must give first priority to the purchase of cost-effective transportation services from existing and appropriate public transportation authorities providing integrated service or appropriate integrated human service transportation providers. Such systems should utilize local Public Utilities Commission certificated carriers where they exist and where they are able and willing to provide service in an integrated cost-effective manner. When an integrated transportation system is providing services to the AAA, it is the primary transportation service provider. Staff of the AAA or subcontractors should not transport clients in their personal vehicles except in emergency situations.
  2. Entering into contractual agreements with existing common carriers authorized by the Pennsylvania Public Utility Commission or other non-profit or government agencies presently operating a transportation program for the provision of services or for the operation of Area Agency vehicles and other available rolling stock. Until a coordinated transportation system is developed as part of a comprehensive transportation service network, the AAA may provide financial support for individual transportation efforts only with the clear understanding by the subcontractor and through AAA contract language that these separate programs will become part of a coordinated transit system when one is established.

3. Entering into working agreements with agencies, whereby human services transportation resources are pooled and transportation is offered on a cooperative basis. The sole purpose of resource sharing is to deliver the maximum level and scope of transportation to the elderly, given available funding. Provision of transportation in this manner is to be viewed only as a preliminary step to the development of a coordinated area or county-wide transit system.
4. As a last resort only and in the absence of available and appropriate agencies from whom cost-effective transportation can be purchased or with which transportation services can be cost-effectively coordinated, the Area Agency on Aging may be permitted to provide non-integrated transportation services and conduct the intake, dispatching, and operation of a transportation program for the elderly. As appropriate agencies become available from which cost-effective transportation can be purchased or with which functions necessary to provide transportation services or transportation services themselves can be coordinated, the Area Agency shall contract services or enter into coordinating agreements for the provision of service. The AAA must also make every effort to take a lead role in the development and/or establishment of coordinated transportation services for the community's human service and possibly public transportation needs.

## Section II - General Requirements

### II.1 - Program Operation and Administration

Regardless of the method of service provision, Area Agencies on Aging are responsible for the management, supervision and/or monitoring of all transportation services provided with funds from the Department of Aging. Transportation services financed by the Area Agency on Aging must include the following components:

- a. Intake and Screening Mechanism - An intake and screening mechanism for receiving transportation service requests must be in use. Any such system must be consistent with the eligibility and priority setting procedures as established by the Area Agency on Aging.
- b. Dispatching Mechanisms - There must be a coordinated dispatching mechanism to schedule the deployment of all transportation resources within a PSA for services financed by the Department of Aging. This mechanism need not be centralized.
- c. Vehicle Operation - Vehicles used to transport older people which were purchased or leased in whole or in part with Aging funds, and are operated with Aging funds may be made available to agencies or organizations on the basis of their client needs and the ability to effectively utilize the vehicles on behalf of their clientele. Methods of operation should be determined locally to best meet the needs of the majority of elderly in the Planning and Service Area. Vehicle operation may be provided in a shared ride, demand responsive

mode and/or along fixed or variable routes or other configurations as appropriate. However, the AAA must only provide exclusive ride services on a supplemental basis and only where it has been demonstrated as the only possible method of providing service to a particular client.

- d. **Vehicle Ownership** - All vehicles purchased with Department of Aging funds must be titled to the Area Agency on Aging, the County or to a single organization with which the Area Agency contracts for transportation services. Vehicle purchases made by an AAA or subcontractor which involve Aging funds must appear in the Aging Block Grant Agreement as capital equipment expenditures. An Area Agency may also assign vehicles for which it holds title to other agencies or organizations to operate on their behalf. In addition, Area Agencies on Aging may provide funds to subcontractors to purchase vehicles. However, upon termination of the transportation purchase-of-service agreements, the ownership of all vehicles and other equipment purchased with Area Agency on Aging funds will revert to the AAA, or the Area Agency will be provided with appropriate remuneration based upon depreciated values at the time the agreement is terminated.
- e. **Vehicle Shared Use** - Vehicles purchased with Aging funds may be used to transport persons other than eligible elderly, provided that such use is accompanied by proportionate cost sharing attributed to the non-elderly ridership. Cost sharing should also include a reasonable shared use allowance paid to the AAA for the value of vehicles placed in the system by the AAA. Such a shared use allowance may be converted into credit to the AAA and applied toward the cost of services purchased by the AAA. Cash based on the depreciated value of vehicles and equipment may also be paid to the AAA, provided that proper accounting procedures are maintained. Any credit, etc. gained by the AAA must be applied to transportation services for the elderly.

## II.2 - Insurance Coverage

The following minimum insurance coverage is required of the Area Agency or the agent providing passenger transportation services for the AAA. These are minimum standards only. It is recommended that additional coverage be purchased where appropriate and at the discretion of the AAA and/or transportation provider.

- Liability and property damage
  - \$500,000 single limit (S.L.)
- Uninsured motorists
  - bodily injury
    - \$30,000 single limit (S.L.)

## Basic Personal Injury Protection (PIP-No fault)

### Collision

Actual cash value of the vehicles and equipment on the vehicles.  
(Applies only to vehicles and equipment purchased entirely or  
in part with Department of Aging funds.)

The above are minimum requirements. They do not address all insurance variables.

Area Agencies on Aging must require service providers to furnish documentation of vehicle insurance coverages. Service providers must also carry insurance which is adequate to cover liabilities incurred as a result of escort activities. Volunteers in the Area Agency-funded transportation program who drive their personal vehicles on behalf of the elderly must consult their own insurance companies to guarantee that their insurance applies under these conditions. Service providers must also carry secondary coverage for liabilities which may be incurred in excess of those allowed by each volunteer's insurance policy. Before participating in an Area Agency-sponsored transportation program, volunteers must provide written proof that their voluntary transportation activities are covered by their own insurance policies.

Agencies should note that they may be liable for insurance claims in excess of insurance limits. Each Area Agency or service provider must consult with its insurance provider to guarantee adequate coverage for its transportation program.

### II.3 - Vehicle Requirements

Effective the date of this APD, all vehicles ordered for lease or purchase using Department of Aging funds for passenger transportation must comply with the following requirements as indicated. Specifications which are underscored apply to passenger vans or buses only. Requirements not underscored apply to all vehicles purchased with Department of Aging funds. (Existing rolling stock in Area Agency transportation systems, whether leased or purchased, need not be adapted to conform to these specifications.)

#### a. Seating

Driver and passenger seat belts, padded seat backs, seats securely mounted to the vehicle.

#### b. Boarding Features

Interior handrails, stanchions (upright posts) and seatback rails sufficient to permit safe boarding, on-board circulation, seating assistance, and disembarking of all passengers, particularly those with physical impairments.

Floors and steps covered with skid-resistant matting firmly secured to the floors. Aisleways and step edges clearly visible and marked by contrasting colors.

c. Components

Shock absorbers, springs, brakes compatible with the weight of the vehicle at maximum load. Tires, axles and other chassis components with rated capacity sufficient for maximum load of the vehicle.

d. Electrical System

Batteries and alternators of sufficient capacity to power all equipment.

e. Emergency Equipment

A first aid kit with sufficient supplies for the passenger capacity of the vehicle. Emergency flags and/or flares. A five-pound dry chemical fire extinguisher. Vehicles must have an emergency exit either through a rear door, detachable windows or a roof hatch.

f. Mirrors

One inside and two outside rearview mirrors to aid in visibility inside and around the vehicle.

Vehicles must be maintained in a safe operating condition through a systematic preventive maintenance program which at a minimum meets the recommendations of the vehicle manufacturer. In addition, all vehicles in the fleet must have current Pennsylvania motor vehicle inspections and meet all state inspection requirements related to safety and pollution control.

Drivers are required to perform daily pre-trip inspections of their vehicles in order to insure that any defects or deficiencies which may affect the safety of the vehicle's operation are corrected before persons are transported.

At least one vehicle operated as part of the transportation service network must have provisions for accommodating passengers confined to wheelchairs. Area Agencies on Aging must insure that a vehicle so equipped is available when needed throughout the Planning and Service Area. Such vehicles shall have wheelchair securement devices attached to the vehicle structure, with integrity comparable to that of the seat mounting.

#### II.4 - Other Applicable Laws and Regulations

Vehicles used to supply transportation services on behalf of Area Agencies on Aging are subject to the motor vehicle laws and regulations of the Commonwealth of Pennsylvania. Owners and operators of vehicles used in providing service on behalf of the Area Agency must be familiar with these laws and regulations as they relate to the type of vehicles being operated as well as the appropriate operators licensing requirements. All agency vehicles must be registered and must comply with state-required inspections.

#### II.5 - Staff Training

No special examination or license is required of drivers in the Area Agency transportation program except as may be required by the Bureau of Motor Vehicles. However, all drivers of vehicles purchased or operated with Aging



funds must be at least 18 years of age, have an annual medical examination including a vision test, and have a valid Pennsylvania operator's license.

All drivers in the Area Agency transportation service network must have standard first aid training and Basic Life Support (CPR) training approved by the American Red Cross or the American Heart Association within the first six months of their employment. Drivers should be trained to know how to proceed in the event of an accident or incident occurring while providing passenger transportation services. In addition, drivers must receive standardized driver training as specified by the Department as available. AAAs and service providers should provide in-service training on a regular basis to its drivers as deemed appropriate.

#### II.6 - Data Collection

AAA's must determine their own data collection needs to aid in the evaluation and monitoring of transportation services. For transportation services provided with funds from the Department of Aging, AAA's must supply all information as required in the current APD on Program and Financial Reporting Requirements as well as any other records as may be required by the Department of Aging.

#### II.7 - Collection of Project Income

Please refer to the current APD on Project Income as it relates to the provision of transportation services.

Questions regarding this APD should be directed to your Field Liaison Representative.

ORIGIN: Division of Program Management, Bureau of Program and Field Operations, Department of Aging.