Deep East Texas Council of Governments (DETCOG)

# Transportation Voucher Program

## Final Report

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## Abstract

The transportation voucher pilot program, deployed in five counties (Jasper, Newton, San Augustine, Sabine and Tyler) within the Deep East Texas Council of Governments (DETCOG) service region, was developed to provide transportation to individuals 60 years of age and older to access grocery stores, appointments not covered by Medicaid, personal care appointments, and other approved trips that contributed to participants' quality of life. Researchers worked with DETCOG to develop: 1) policies and procedures, 2) provider training, and 3) rider training for the transportation voucher program. A budget of approximately $150 per month was provided to approximately forty approved participants. Unlike most previously deployed transportation voucher programs that exclusively focused on individuals with disabilities, this program focused on older Americans. Challenges encountered included riders who had difficulty remembering how to book rides, scam phone calls in the region, differentiating between Medicare transportation and the transportation voucher program, and addressing the needs of those who need transportation weekly, monthly, or intermittently. An unexpected benefit identified was that the program has allowed DETCOG staff members to help program participants identify and access other applicable programs (e.g. Supplemental Nutrition Assistance Program (SNAP)).

## Disclaimer

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## Introduction

The twelve-county service region of the Deep East Texas Council of Governments (DETCOG) has significant mobility needs for veterans, people with disabilities, older adults, and other transportation disadvantaged individuals. These groups need trips for medical, employment, education, social visits, recreation, and shopping purposes. There is a desire to use both volunteers and existing transportation providers to fill the transportation gap for the targeted groups by funding travel with a transportation voucher program.

The DETCOG service region covers twelve counties in rural, eastern Texas. The five counties where the pilot was conducted are outlined in yellow (Figure 1).

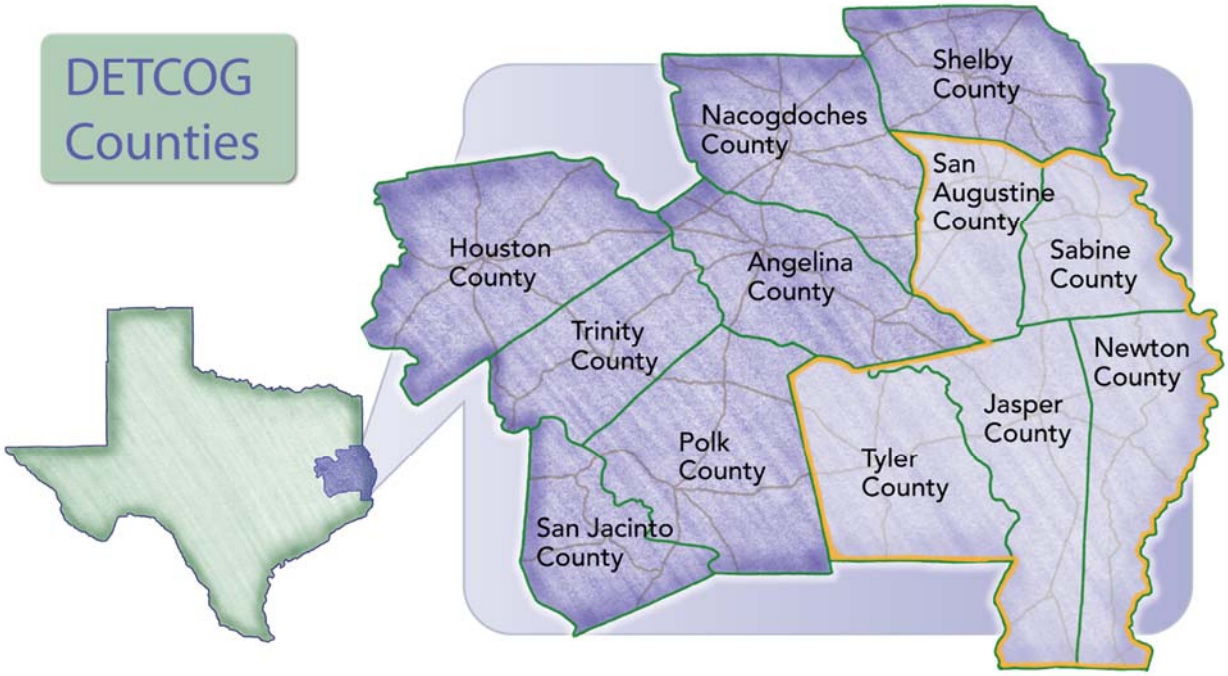


**Figure 1. DETCOG Twelve-County Region, Project Counties Outlined.**

While the DETCOG service region spans 3.9% of the state of Texas' land mass (10,383 of 268,597 square miles) (Deep East Texas Council of Governments, n.d.), the service region represents only 1.5% of the total population in Texas (Deep East Texas Council of Governments and Economic Development District). The DETCOG service region has had very little change in population since the last U.S. Census, possibly because it is isolated from metropolitan areas due to the lack of interstate highways and regional airports. Without an interstate highway or regional airport, limited job opportunities exist for this region. Yet, many retired Texans are drawn to this region for its natural beauty and recreational appeal. Many residents in this rural area, including veterans, people with disabilities, older adults, and other transportation disadvantaged individuals have mobility limitations. While Medicaid assists many of these focus groups with transportation to medical appointments, it does not allow these individuals to access groceries (including prescriptions), travel to places of employment, conduct social visits, or travel for recreation. These latter categories are quality-of-life concerns which, in turn, can impact how often

a person develops medical issues (e.g. social isolation can lead to depression (Lewis, Shah, & Abrams, 2018); lack of access to healthy food choices can lead to obesity (Food Research & Action Center (FRAC), 2018).

DETCOG and others in this region wanted to fill the existing transportation gaps by implementing a pilot transportation voucher program. The pilot focused on five of the twelve counties within the DETCOG service region: Jasper, Newton, San Augustine, Sabine, and Tyler. These counties were chosen because, unlike their peer counties in the region, there was limited, if any, public transportation available. In other surrounding counties, Brazos Transit provides public transportation service. Furthermore, some counties have been able to provide veteran-specific transportation. Thirty percent of the DETCOG service region population are Veterans (Deep East Texas Council of Governments and Economic Development District). In order for Brazos Transit to operate in a county, the county must provide a match, which is a reported hardship or not a priority for these five counties. (Note: At least one of these counties is addressing flood damage from a hurricane).

Table 1 presents the breakdown of the population by several age ranges, with the counties included in the pilot transportation voucher program highlighted in bold.

**Table 1. Population distribution by age for DETCOG service region counties (2).**

| | **Age Group** | | | | | | |
|---|---|---|---|---|---|---|---|
| County | 10-14 | 15-19 | 20-24 | 25-34 | 35-54 | 55-75+ | 2013 TOTAL Population |
| Angelina | 6,550 | 6,231 | 5,470 | 10,854 | 22,901 | 20,194 | 87,441 |
| Houston | 1,312 | 1,536 | 1,083 | 2,696 | 6,761 | 7,710 | 22,911 |
| **Jasper** | **2,381** | **2,406** | **1,836** | **4,055** | **9,421** | **10,658** | **35,649** |
| Nacogdoches | 4,040 | 6,633 | 8,725 | 7,962 | 14,167 | 14,356 | 65,330 |
| **Newton** | **980** | **1,084** | **813** | **1,591** | **3,956** | **4,291** | **14,140** |
| Polk | 2,752 | 2,753 | 2,435 | 5,179 | 12,271 | 14,838 | 45,790 |
| **Sabine** | **638** | **621** | **438** | **822** | **2,587** | **4,659** | **10,361** |
| **San Augustine** | **529** | **543** | **439** | **764** | **2,235** | **3,363** | **8,769** |
| San Jacinto | 1,868 | 1,814 | 1,290 | 2,560 | 7,040 | 8,503 | 26,856 |
| Shelby | 1,765 | 1,816 | 1,541 | 2,956 | 6,541 | 6,976 | 25,972 |
| Trinity | 904 | 856 | 648 | 1,330 | 3,655 | 5,586 | 14,393 |
| **Tyler** | **1,267** | **1,311** | **1,316** | **2,895** | **5,654** | **7,037** | **21,464** |
| DETCOG Totals | 24,986 | 27,604 | 26,034 | 43,664 | 97,189 | 108,171 | 379,076 |

The five counties included in the pilot have some of the smallest populations in the region, except for Jasper County. Jasper County was chosen, in part, because the DETCOG office is located within this county; furthermore, this county is centered within the other four counties (Figure 1). Finally, other socioeconomic and demographic statistics associated with Jasper County are relevant to the focus of the proposed program. For example, while approximately six percent of all DETCOG service region

households have no vehicle, Jasper County exceeds this average with 7.3% of its households not having a vehicle (Deep East Texas Council of Governments and Economic Development District). These percentages do not take into consideration households that have inoperable vehicles.

The average *household income* for the DETCOG service region was $37,762 (2014), which is twenty-five percent below the state average (Deep East Texas Council of Governments and Economic Development District). More than twenty percent of the *wages* earned by households within the DETCOG service region are categorized as below the poverty level (Deep East Texas Council of Governments and Economic Development District).

## Activities Conducted

The objective of this project was to work with the DETCOG staff to determine the feasibility of establishing a transportation voucher program in Deep East Texas. The researchers worked with DETCOG to: 1) determine if the transportation voucher program is needed and feasible, 2) provide support in planning for a transportation voucher program, and 3) assist with marketing and public outreach for a pilot program. The following activities were conducted as a part of this effort: a summary of the demographics in the DETCOG service region, a literature review summary to identify key findings for the successful implementation of a transportation voucher program and identify lessons learned, an implementation plan, policies and procedures for the transportation voucher program, training materials, and creation (drafting and printing) of transportation voucher checks. After the previous activities were completed, implementation of the pilot transportation voucher program began. A detailed summary of each activity is provided below, and the deliverables can be found in the Appendices.

### Demographic Summary

Documents provided by DETCOG and a literature search were used to summarize past and current demographics in the DETCOG service region as they may relate to need for and participation in a transportation voucher program. Based on the documentation available, it was determined that Deep East Texas has many population groups needing transportation including elderly, Veterans, individuals with disabilities, low-income individuals, and individuals with limited access to transportation. While there appears to be more than a few transportation options for individuals in the rural counties of DETCOG, it is important to note that many of these providers 1) can only serve specific populations (e.g., Medicaid funding for medical appointments), 2) may not allow all types of transport, or 3) may not have trained staff or equipment to provide transportation for individuals with specific disabilities (i.e. not all transportation providers can accommodate individuals in wheelchairs). More specific information about demographics of the DETCOG service region can be found in Appendix A – Demographic Summary.

### Literature Review on other Transportation Voucher Programs

The research team conducted a comprehensive literature review to understand existing information regarding the use of transportation voucher programs to support transportation for underserved populations. Researchers reviewed past and present transportation voucher programs focusing on lessons learned and implementation plans, as well as funding sources for these transportation programs, other identified transportation providers, and forward-looking voucher payment tools. Results of the initial Literature Review conducted during the project can be found in Appendix B. The following section summarizes literature that relates to key points found as a result of the pilot or literature that was used as a foundation for the development of the pilot transportation voucher program.

The lack of institutional resources was suggested by Seekins et al. as directly contributing to the scarcity of transportation options in rural areas (Seekins, Bernier, & Herron, 1999). A primary benefit of a voucher model is that it reportedly creates a **foundation for organized transportation where there**

**previously was none**. Another important benefit of the voucher model noted by Seekins et al. is that it is consistent with the **independent living philosophy** because participants in the program organize their own transportation.

Bernier and Seekins proposed the transportation voucher program as a solution for individuals with disabilities who are living in rural areas and commonly identify the lack of transportation as a significant barrier (Bernier & Seekins, 1999). Three case studies were presented in this journal article, with two of the programs being in Montana and the third in South Dakota. Two of the programs were overseen by developmental disability case management service programs and the third by an independent living center. Not only were the vouchers instrumental in the structure of the program, they were also cited as a useful tool to measure their effectiveness. Employment, daily living, evening and weekend social purposes, and non-emergency medical treatment (NEMT) constituted the trip purposes for the more than 35,000 miles of travel across the three programs (ranging from 450 to 581 days in the study period). The role of the community transportation coordinator (CTC), how vouchers were used, and the requirements of the drivers were all discussed in the journal article.

Ten locations were used as test beds when the Association of Programs for Rural Independent Living (APRIL) tested the scalability of voucher programs: 1) Homer, Alaska; 2) Bainbridge, Georgia; 3) Hays, Kansas; 4) Carbondale, Illinois; 5) Fall River, Massachusetts; 6) Marshall, Minnesota; 7) Pablo, Montana; 8) Zuni, New Mexico; 9) Camp Hill, Pennsylvania; and 10) Price, Utah (Association of Programs for Rural Independent Living (APRIL), 2006). The focus of these voucher programs was on the mobility of people with disabilities. APRIL wanted to demonstrate how small towns and rural communities can successfully organize and operate flexible, supported transportation programs for people with disabilities. Each site was provided with operational strategies and resource materials. An outcome of this work was a replication kit that a community can use to implement a similar program (Gonzales, Stombaugh, Seekins, & Kasnitz, 2017).

Services provided by faith-based organizations were found to have limited effectiveness in filling the gap in rural transportation (Enders & Seekins, 2007). Some issues with relying on faith-based organizations to supply transportation were: too few vehicles were owned by the organization, lack of accessibility features on available vehicles, age of vehicles, and maintenance of vehicles. Enders and Seekins also suggested that faith-based organizations indicated that they did not have an interest in providing a public service.

The statistics associated with implementing ten voucher programs were reported by Gonzales et al. (Gonzales, Stombaugh, Seekins, & Kasnitz, 2006). Five hundred eighty-eight adults with disabilities were served and 92,587 rides were provided, covering 1,018,391 miles, with an average cost of $0.39 per mile. The use of the voucher program for employment or employment preparation was reported by 171 individuals, which enabled them to obtain part and full-time employment. The voucher programs were described as: 1) very effective, 2) easily implemented, 3) low cost, and 4) aided users in seeking employment.

Challenges associated with public transportation, including transportation voucher programs, include liability, fraud, and resource limitations. As an example, in Seekins' review of public transportation models (including voucher programs) he highlighted liability and resources as challenges (Seekins T. , 2007). The most common form of fraud identified by a document that discussed abuse of Medicaid NEMT was claiming loaded mileage when a rider was not using the service (Department of Health and Human Services, 2016).

More recent research being conducted by Hanson and Goudreau is focusing on creating a uniform data collection method for Volunteer Driver Programs (VDPs) in Canada (Hanson & Goudreau, 2017). The need to define "trips" and consistently recording data across various programs are highlighted in their report. While designers of the programs believed that they clearly defined drives/trips and stops, they found that the definitions were not clearly understood, and the data was not recorded for each item consistently. Data collection recommendations included: date and start time of drive; unique driver ID number; number of clients/users and escorts; distance travelled; number of stops; and purpose of stops. While not required, the researchers also suggested collecting the unique rider ID, number of riders participating in each trip, and number of stops made. Hanson and Goudreau suggested that two independent spreadsheets be used: one to track driver information and the second to track rider information. Four hundred individuals were part of five programs in which data was collected for an average of 8 trips per year from 80 volunteer drivers, with an average of 21 volunteer drivers, 105 clients, 660 rides provided, and 49,200 km driven (Note: 49,200 km = 30,559 mi). Trip purposes, in order from **most commonly used** to least commonly used, include:

- **Health (medical) (56%)**,
- Life maintenance (shopping, etc.) (20%), and
- Work/education (17%).

**Health and life maintenance** were more frequently reported as **individual** rides whereas **work/education trips** were most likely to be **shared** rides. Yet, health trips were found to have the longest travel distances even though they have the lowest utilization of persons per drive (shared rides). These rides took place during work hours, which may have implications on who can provide these rides (e.g. retirees). Most trips consisted of one to two stops and riders made one to ten trips during the data collection period.

Continuing research by Goudreau and Hanson (Goudreau & Hanson, 2018) summarizes best practices used in VDPs based on a developed maturity model. The analysis found that medium-sized VDPs (generally defined as 50 to 100 riders) showed the highest maturity levels of key practices. The authors suggest that an increase in sophistication of practices is needed to increase from a small-sized VDP (generally defined as 50 or fewer riders) to a medium-sized VDP, but to then grow to a large VDP (generally defined as 100 to 300 riders) is much easier if these key practices are already in place. (Note: See Table 2 for a summary of characteristics associated with various VDP sizes). Key practices that were common at high levels of maturity in VDPs include: performing a criminal background check on potential volunteers, recording organizational statistics, pursuing multiple funding sources, and establishing a

process for determining reimbursement rates. The authors note that some key practices may be transitional in nature and necessary in certain phases of program development.

**Table 2. Summary of VDP Characteristics by Size.**

| Size of Program | Number of Riders | Budget | Staff (FTE) | Percentage of Rides Provided to Individuals 65 Years and Older |
|---|---|---|---|---|
| Small | < 50 | n/a | 0.5 | 65% |
| Medium | 50-100 | $55,000 | 1.5 | 50% |
| Large | 100-300 | $141,000 | 1.7 | n/a |

*FTE = Full-Time Equivalent

Hanson looked at understanding the supply of and demand for volunteer driving in Canada (Hanson, 2018). He found: 1) half of all volunteer drivers in Canada are 35 – 54 years old, 2) about 5% of volunteers provide about 60% of the volunteer hours, and 3) Canadians aged 65-74 years old volunteer the largest numbers of hours overall but *each* driver between 55-64 years old provided the highest number of volunteer driving hours. Hanson reports that drivers aged 55 and older likely contribute the greatest number of hours because they have more time availability and flexibility, having transitioned out of the workforce. While trip purpose was not identified, the top three categories of organizations providing VDP transportation were identified as: 1) Culture & Recreation, 2) Social Service, and 3) Religion.

Tiehen et al. (Tiehen, Jolliffe, & Gundersen, 2012) wanted to better understand the impact of the Supplemental Nutrition Assistance Program (SNAP) benefits on the depth and severity of poverty rather than the rate. This is because while the addition of SNAP benefits will likely not bring a household out of poverty (the authors note that the closer a household was to the threshold, the less likely the household was to participate), it will significantly improve their wellbeing. They used the U.S. poverty calculation, which does not include SNAP benefits, and compared it to the impact after SNAP benefits were added to family income. They found an average annual decline of depth and severity as a result of SNAP benefits, which was more pronounced in nonmetropolitan areas. Child poverty was also found to be higher in nonmetropolitan areas when compared with metropolitan areas. Another significant finding is that considering only rate, the impact of SNAP benefits on poverty are underestimated.

In summary, the transportation voucher programs to date tend to be focused on individuals with disabilities. Since limited or no public transportation currently exists in the five-county pilot DETCOG service region, the transportation voucher model can provide a good foundation for organized transportation, as suggested by Seekins et al. (Seekins, Bernier, & Herron, 1999). For the DETCOG transportation voucher program, the program focused on providing transportation for individuals sixty years of age and older, as the funding source used to provide the transportation is from the Older Americans Act (OAA). Those who are sixty years of age and older may also be categorized as disabled and or Veterans, so these qualifiers are not necessarily mutually exclusive. As additional funding is

identified, DETCOG hopes to expand the program to address the needs of low-income earners of any age, particularly to enable them to access employment.

### Kick-Off, On-Site Meeting in Jasper, Texas

At the beginning of the project, researchers met on-site with DETCOG representatives and representatives from each participating county, key stakeholders, transportation providers, and key members of the community to better understand the needs of those who were anticipated to use the transportation voucher program as well as those providing transportation. A one-day meeting was held at the DETCOG office and follow up meetings were held at additional locations at the convenience of the stakeholders.

The researchers and DETCOG representatives met with potential transportation providers, including East Texas Support Services (ETSS), Brazos Transit District, and Watts Transportation to provide information about the program and better understand their interest and concerns. ETSS, through programs in previous decades, indicated that it had been able to provide transportation for older Americans to allow them to travel to the grocery store and the beauty parlor but noted that such programs were discontinued. ETSS representatives suggested that this travel improved the quality of life of these individuals. In addition, the research team learned about a previous project in which DETCOG had tried to collaborate with Brazos Transit District on a grant application where funding was returned. Such history reportedly made consideration of future programs a sensitive matter. In addition, per the Texas Department of Transportation, Brazos Transit District is the official transit service provider for the DETCOG service region.

The on-site visit was critically important for the research team to establish a rapport with the DETCOG team, transportation providers, and community members.

### Implementation Plan

Following the demographic summary, literature review, and kick-off on-site meeting, an implementation plan was developed to help establish a transportation voucher program with DETCOG. Figure 2 provides an outline for the approach developed. DETCOG identified key staff to participate in the transportation voucher program (Step 1). These individuals then used existing contacts to identify transportation providers and potential riders and worked to establish a budget (Step 2). Simultaneously, the roles and responsibilities of DETCOG staff and the rules and regulations of the transportation voucher program were established (Steps 1, 2, 3). DETCOG worked with transportation providers directly to determine reimbursement rates per one-way trip (Step 3). To establish the pilot program, on-site trainings were held with riders in the five participating DETCOG counties and with licensed transportation providers in Jasper, Texas (Step 4). From these trainings, a list of individuals interested in participating in the pilot program was developed. These individuals were then enrolled in the program by DETCOG, and provided with transportation voucher checks, after which they were able to participate in the program (Step 5).

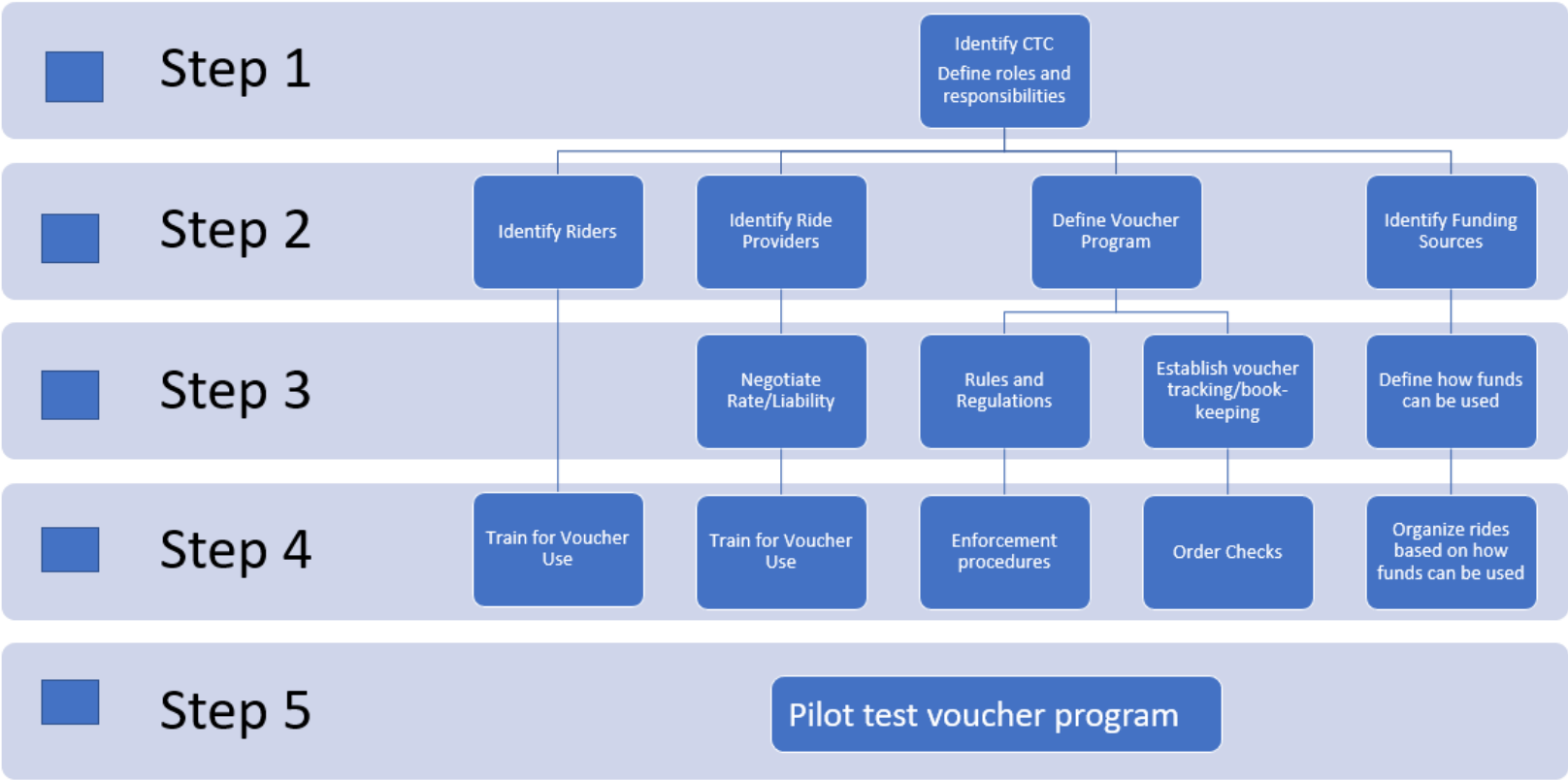


**Figure 2. Approach for establishing a transportation voucher program with DETCOG.**

The current riders in the transportation voucher program are individuals 60 and older within the five target counties. DETCOG anticipates expanding the program to those under the age of 60 in the future as additional funding sources allow. To help support DETCOG in expanding the program to support individuals under the age of 60 who may need temporary transportation assistance, the research team identified the following potential funding sources:

- Texas Health and Human Services, Independent Living Services grants
- T.L.L. Temple Foundation
- Texas Department of Agriculture, Planning and Capacity Building Fund (PCB)
- Brookshire Brothers
- Walmart
- Dialysis Centers

Two example applications that were started and provided to DETCOG can be found in Appendix C – Draft Applications. (Note: Several other funding sources were considered, but DETCOG did not seem to meet the criteria. These included: U.S. Department of Veterans Affairs, Highly Rural Transportation Grants (HRTG) [there are more than 7 people per square mile]; Communities Foundation of Texas; and United Way [did not include counties within DETCOG]).

Another potential user group consists of individuals who have funding and choose to pay for their own ride through this service; DETCOG will need to find a way to capture this data and understand its implications, such as providing match to the program, tracking funds received, and how to handle the cost if a ride is shared between a voucher user and a paying rider.

### Transportation Voucher Program Policies and Procedures

Policies and procedures documents were created for both the riders and transportation providers and can be found in Appendix D – Transportation Voucher Policies and Procedures. The information included in the policies and procedures was then converted into training materials including a poster (Figure 3).

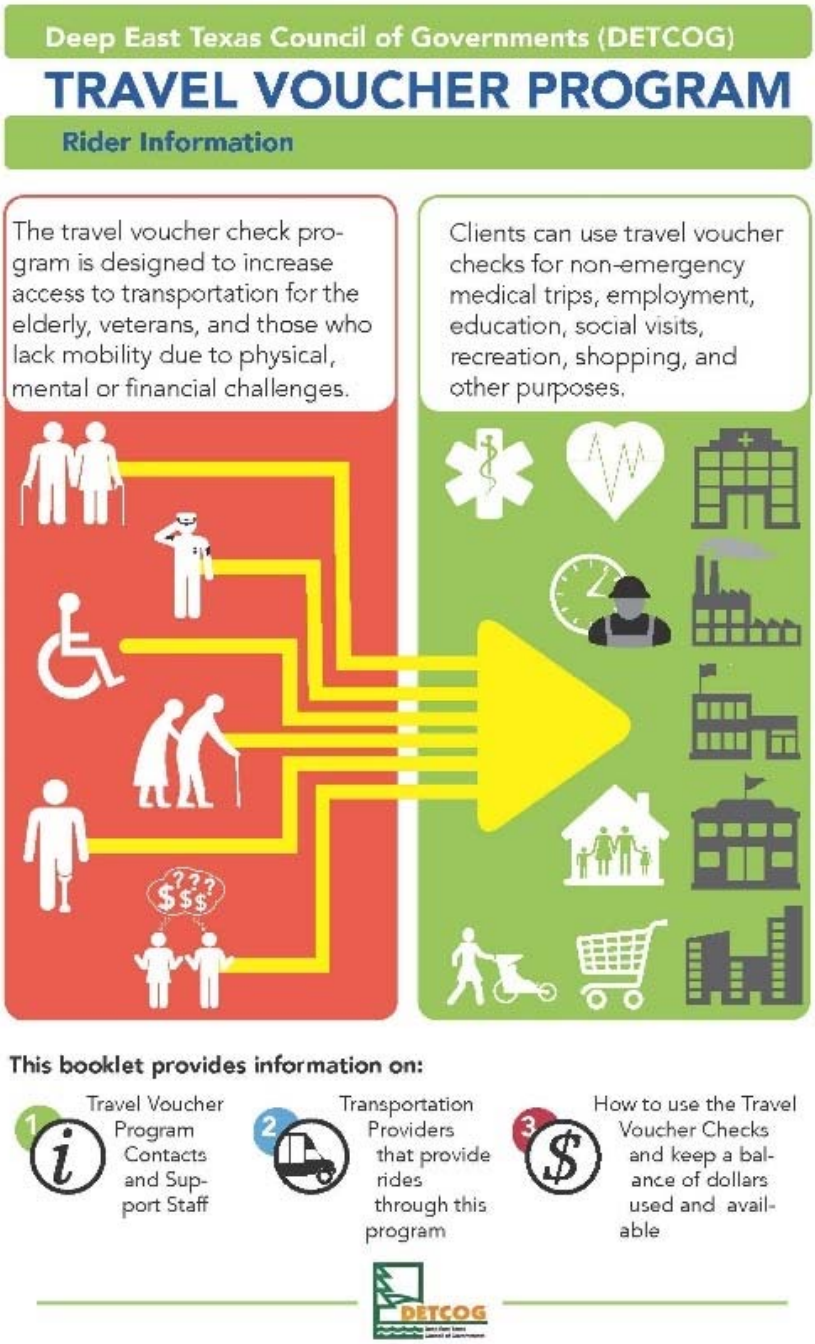


**Figure 3. Cover of the rider training materials that was converted into a poster format for advertising the transportation voucher program.**

There were some concerns expressed prior to the start of the program with potential abuse of the transportation voucher program; examples of abuse were discussed in the Literature Review [ (Seekins T. , 2007), (Department of Health and Human Services, 2016)]. The policies and procedures document addressed some concerns associated with fraud by: 1) limiting the monthly allotted allowance for each rider, and 2) adding in language that would allow for removal of the rider from the program if fraudulent activity occurred. These precautions are primarily aimed at preventing fraud by the rider. As DETCOG uses the ride providers for other services, it is anticipated that review of rides for these other services may also include reviews of the rides provided for the transportation voucher program, as necessary. At this time the rider is in possession of the travel checks or a voucher check book is located at the housing authority office to provide vouchers to riders as they are needed for residents of that community. As noted earlier, DETCOG works with the riders to educate each rider about the transportation voucher program. Furthermore, DETCOG discusses other programs for riders and may seek feedback on transportation providers during such meetings, serving as another check on transportation providers.

The transportation voucher checks were created based on a design in the *Toolkit for Operating a Rural Transportation Voucher Program* (Gonzales, Stombaugh, Seekins, & Kasnitz, 2017), but modified to fit the needs of the DETCOG transportation voucher program. This included matching the classic look of banking checks, using large font that is easy to read (important for those 60 years and older), allowing for all necessary information to be collected on a single check, and having a carbon copy of the check so that riders can easily track their own use of the checks and determine the remaining balance available for future rides. The initial transportation voucher check contained: 1) a rider's name, 2) the date of the travel, 3) the recipient of the reimbursement (e.g. transportation provider, volunteer driver), 4) the number of one-way rides (a single check could be used for multiple trips if they were all to and from the same location, such as a volunteer driver that provides a weekly ride to and from the same grocery store), 5) the trip purpose (e.g. work, medical, social/religious, school, shopping), 6) the rider's signature, 7) the cost of the trip, 8) the miles of the trip, and 9) the duration of the trip(s) (Figure 4).

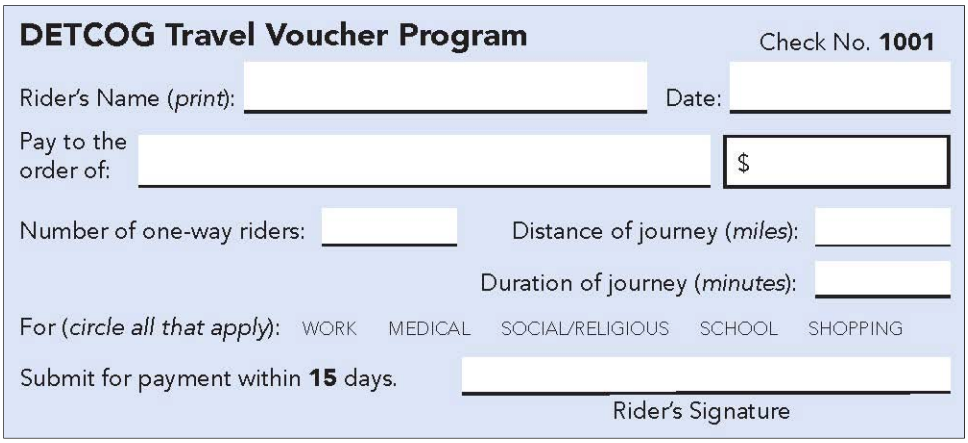
DETCOG Travel Voucher Program
Check No. 1001
Rider's Name (*print*): _____ Date: _____
Pay to the order of: _____ $
Number of one-way riders: _____ Distance of journey (*miles*): _____
Duration of journey (*minutes*): _____
For (*circle all that apply*): WORK MEDICAL SOCIAL/RELIGIOUS SCHOOL SHOPPING
Submit for payment within **15** days. _____
Rider's Signature

**Figure 4. Transportation voucher check developed for use by DETCOG**.

A second iteration of the voucher check is shown below (Figure 5). The intent behind this modification was to capture more information from the riders on the purpose of the trip and to reduce confusion associated with the carbon copies. The new checks no longer have a carbon copy.

DETCOG Transportation Voucher Program Check No:

Rider's Name (Print):_____ Date: _____

Pay to the
Order of _____ $_____

Trip Start Time: _____ Trip End Time: _____ Total Travel Time: _____

Number of One-Way Rides: _____ Odometer Start:_____ Odometer End:_____

Reason for Trip: _____ Medical – Doctor/Pharmacy Visit
_____ Shopping
_____ Brookshire Bros _____ Walmart _____ Other

_____ School/Work
_____ Church/Religious Activities
_____ Other (Beauty/Barber Shop; Personal Business; Post Office, etc)

PLEASE SIGN AND GIVE TO DRIVER: _____
Rider's Signature

**Figure 5. Revised DETCOG Transportation Voucher Check.**

The transportation voucher check was further refined for readability (Figure 6).

**DETCOG Travel Voucher Program** Check No. _____

Rider's Name (*print*): _____ Date: _____

Pay to the
order of: _____ $

Trip Start Time: _____ Trip End Time: _____ Total Travel Time: _____

Number of One-Way Rides: _____ Odometer Start: _____ Odometer End: _____

Reason for Trip:
_____ MEDICAL–Doctor/Pharmacy Visit _____ SCHOOL/WORK CHURCH/RELIGIOUS ACTIVITIES
_____ SHOPPING _____ Brookshire Bros _____ Walmart _____ Other _____
_____ OTHER (Beauty/Barber Shop. Personal Business, Post Office, etc.)

PLEASE SIGN AND GIVE TO DRIVER: _____
Rider's Signature

**Figure 6. Final DETCOG Transportation Voucher Check.**

The cost of the trip is identified if a transportation provider is used, whereas the miles of trip are identified if a volunteer driver provides the transportation. However, both should note the duration of the trip.

### Second Site Visit – Trainings

The developed materials presented above and in Appendix D – Transportation Voucher Policies and Procedures, were printed at a local printer (Luffkin Printing) and in-house at DETCOG. Site visits, conducted by the researchers, were coordinated by DETCOG staff in each of the five participating DETCOG counties (Jasper, Newton, San Augustine, Sabine, and Tyler). Site visits were held at housing authorities and one house visit was made. A meeting / training was held at the DETCOG office with existing transportation providers, which allowed everyone to provide feedback on the program, discuss important rules and regulations, explore issues that have been observed in other transportation programs (e.g. Medicaid) and discuss solutions for any unresolved issues.

A total of seven meetings / trainings were held over a three-day period co-led by various DETCOG staff and the research team.

Outcomes of the site visit included:

- Identification of over 40 individuals to enroll in the program from the five counties,
- Identification of three potential volunteer drivers,
- Feedback from potential riders on how the program would be used and their needs,
- Feedback from transportation providers on what services they provide, rules and regulations specific to each, distances they are willing to travel, and negotiated rates.

Following the site visits, DETCOG staff contacted potential riders, enrolled them in the transportation voucher program, provided them with voucher checks, and reiterated how the program works. Challenges encountered at this point in the program included:

- Riders not remembering many of the program details following the trainings.
    - This was overcome by holding personalized enrollment meetings where DETCOG reiterated information on how to participate in the program, how to use the transportation voucher checks, and how to book transportation. Follow-up work was required by DETCOG to help these individuals become more comfortable with the program, to assist participants with booking rides, and to encourage them to book rides for themselves. After two months of the pilot program, many riders were confident enough in using the transportation voucher program with support from DETCOG staff that they were able to book their own rides.
- Potential riders not answering their phones due to scams that were well publicized by the television news organizations that targeted elderly populations.
    - As of August 2018, this issue has not been fully overcome due to a second phone scam plaguing the area. DETCOG staff understand a rider's hesitancy to answer phone calls from phone numbers they do not recognize and worked around the issue as best they

could. Examples of how DETCOG worked to establish the legitimacy of the program included making additional home visits, providing the DETCOG phone number to riders for their reference, and contacting family members of the riders to explain the legitimacy of the program.

## Pilot Deployment

The pilot deployment began May 1, 2018, with the researchers assisting throughout the deployment. January of 2019 is the last month in which the researchers will be providing technical support.

After the initial trainings, the researchers assisted DETCOG from afar, scheduling at a minimum, monthly conference calls to pro-actively address challenges DETCOG encountered. The following sections provide a summary of the program data, based on the information provided to the researchers as of January 23, 2019.

Number of Enrollees

As of January 23, 2019, a total of fifty-one individuals were enrolled in the transportation voucher program (Figure 7).

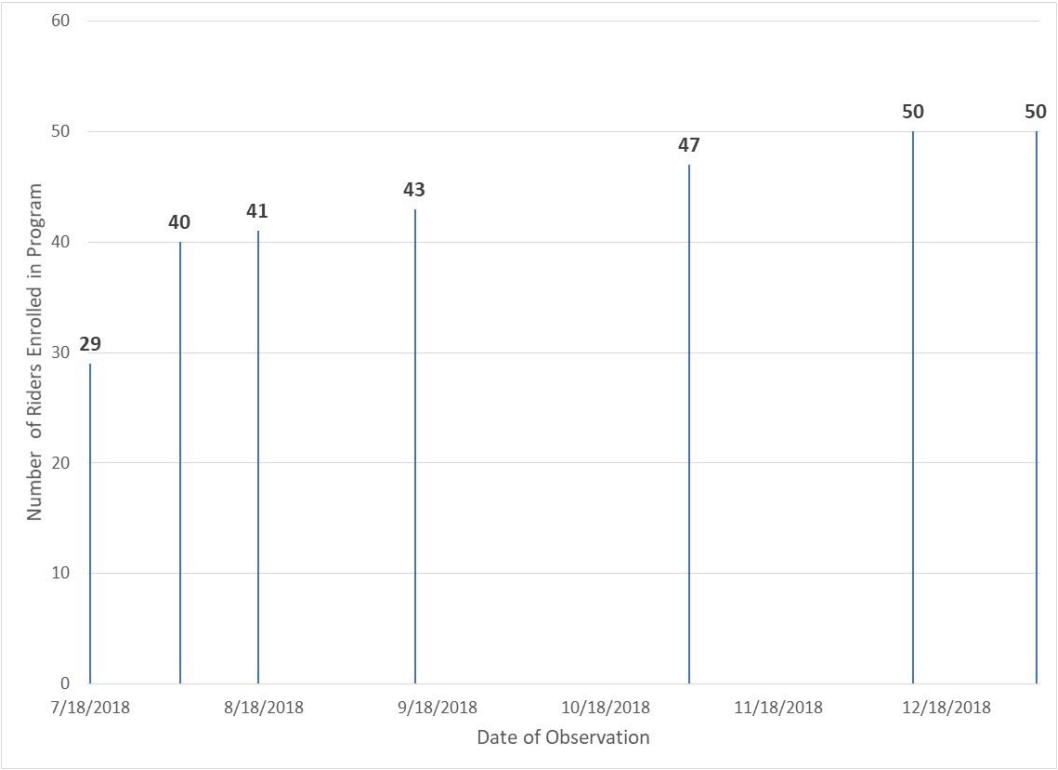


**Figure 7. Number of Enrollees.**

This number is above the desired forty enrollees; however, it also reflects a bit of flux in that some of the original enrollees are not making use of their allotted transportation funds. Seventeen individuals who have been officially "enrolled" have not used any funds. As DETCOG transitions to new enrollees to

ensure that the allotted funding is utilized, there may be more than the budgeted forty participants. Furthermore, DETCOG has realized that some enrollees are using more than their allotted monthly funding. DETCOG is planning to draft a letter to notify participants that they have overspent their funds for the month asking that they contact DETCOG to determine if their needs can be met in a more cost-effective manner.

Of the 51 total enrollees, six are from Jasper County, six from Newton County, fifteen from Sabine County, eighteen from San Augustine County, five from Tyler County, and one from an unknown county.

Program Use

Program use has increased substantially since the pilot program began in May, with November showing the largest use based on the vouchers collected to date (Figure 8).

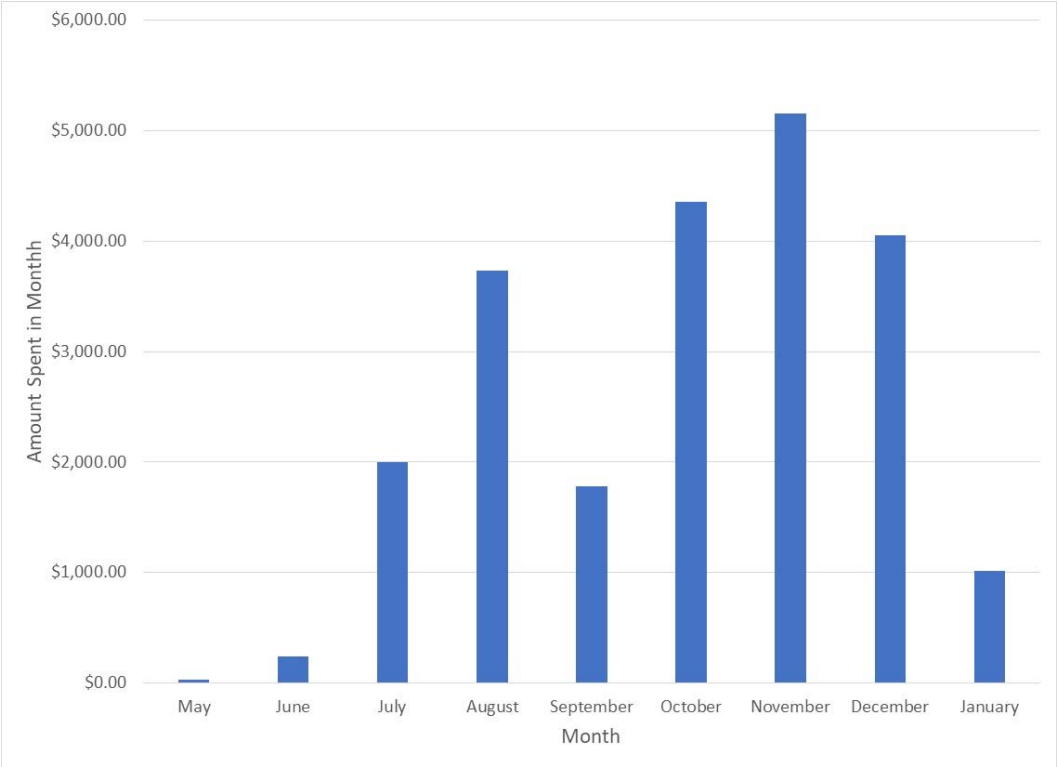


**Figure 8. Monthly Program Expenditures.**

The data shows that the program has ramped up substantially since it began in May. November of 2018 was the month with the greatest use of the transportation voucher program which could represent the start of the holiday season. All of the transportation vouchers for December 2018 may not have been submitted. It is anticipated that many January vouchers are also outstanding. As the program matures and more data is collected over time, it may be possible to identify months or a time of year when additional rides are being requested, therefore allowing for better planning of anticipated expenditures.

Trip Purpose

Two hundred and sixty-five trips have been made since the start of the program. The following shows identified trip purposes (Note: The total percentage will exceed 100% because each trip can have multiple purposes):

1. Medical: 164 of 265 vouchers (61.9%)
2. Shopping: 136 of 265 vouchers (51.3%)
3. Social: 40 of 265 vouchers (15.1%)
4. Religious: 11 of 265 vouchers (4.2%)

5. School: 2 of 265 vouchers (0.8%)
6. Other, Personal, Bank: 5 of 265 vouchers (1.9%)
7. No Information: 18 of 265 vouchers (6.8%)

Overall, one hundred sixty-six trips (62.6%), eighty-one trips (30.6%), and eighteen trips (6.8%) were identified as a single purpose, more than one purpose and no information, respectively.

Medical trips are the leading trip purpose identified. The DETCOG transportation voucher program may be filling a gap by providing medical trips for individuals who do not qualify for Medicaid funded medical travel because their income is too great. Thirty-eight trips were made purely for medical purposes; five program participants only made trips for medical purposes.

Nine volunteer drivers and two licensed transportation providers (e.g. Watts Transportation and East Texas Support Services) have provided rides to date. As the program progresses, DETCOG will have more information regarding, for example, the typical age of volunteer drivers, as discussed by Hanson (Hanson, 2018). All five DETCOG counties included in the pilot have active riders; San Augustine has the greatest number of enrollees, at 18, followed by Sabine at 15, with Tyler and Newton Counties both having 5, and Jasper at 6. One individual does not have a county associated with her.

Based on the funding available to DETCOG and to ensure manageability of the program, the transportation voucher program was slotted to address the transportation needs of forty individuals across the five focus counties for a pilot period of three months, allowing approximately $150 per participant per month. While DETCOG's pilot transportation voucher program uses transportation providers in addition to volunteer drivers, generally speaking, the size of the program, amount of data recorded, and staff regularly dedicated to the program is expected to level out to function at what is described as a "medium-sized" program (see Table 2) (Goudreau & Hanson, 2018) if travel provided by volunteers eventually provides more trips than the transportation providers.

Technology Transfer

Information regarding the program has been shared at the 2018 National Conference on Rural Public & Intercity Transportation in Breckenridge, Colorado. The researchers are scheduled to present to DETCOG's Board on January 23, 2019. Furthermore, DETCOG has expressed interest in presenting at the 2019 Transportation Research Board Low Volume Roads Conference in Kalispell, Montana. Finally, DETCOG has asked that the researchers consider presenting the project at the 2019 Aging in Texas Conference in Houston, Texas, June 26 – 28, 2019.

## Challenges and Lessons Learned

Overall, the pilot transportation voucher program has been successful and DETCOG is interested in working to ensure the sustainability of the program. In addition, DETCOG would like to provide opportunities to enroll individuals living within DETCOG who are younger than 60 years of age and in need of transportation (e.g. individuals younger than 60 years of age with a disability and low-income individuals who need temporary support in traveling to and from a place of employment). This section discusses the challenges encountered and lessons learned as a result of the pilot.

There have been several unexpected challenges associated with transportation providers. First, transportation providers charge based on service within a county, essentially charging by "zone," as compared with mileage charges. Therefore, there is often an additional charge for going across a county line, even if the location where the driver originates is closer to the rider in another county than a driver who originates from the same county. For example, notice the narrowness of Jasper and Newton County (Figure 1). It may be a shorter trip for a transportation provider coming from Jasper County to get to a rider in Newton County than for someone from the southern part of Newton County to get to that same person. Furthermore, the researchers designed the program per original discussions with transportation providers so that there could be one charge for a group of people going from the same origin to a common destination (e.g. a group of people from the same housing authority), or where a rider could coordinate with other existing trips. However, when implemented, the transportation providers reported needing to charge for each rider. The former would have allowed riders to maximize their allowed travel budget by potentially having one rider pay for the trip to the location and the other pay for the trip home from the location.

This highlights a need for clearly communicating with transportation providers at the on-site meetings regarding their policies and ensuring that it is incorporated into the contract with the transportation provider. DETCOG is still working with program participants to encourage them to trip chain (i.e. make multiple stops in one trip, such as a doctor's appointment followed by a stop at the grocery store and drug store) to maximize their monthly budgets. The data showed that about thirty percent of participants have trip-chained. In addition, all of the transportation providers require that riders make advanced request for rides (e.g. 24 to 48 hours). While the program allows a rider to make trips that otherwise would not have occurred, advance notice is not always desirable, such as if a rider needs to travel to a doctor for an immediate problem. Such a need shows the value of having volunteer drivers available to provide rides to program participants. Since DETCOG was already working with transportation providers, travel reimbursement rates were already established with at least one provider.

Another issue with transportation providers has been the difference between curb-to-curb and through-door service. Some of the riders may need a greater level of assistance than some transportation providers are able to provide. This highlights the value of having volunteer drivers who could potentially address this issue. However, if a volunteer does not have a handicapped accessible vehicle, it also highlights the value of having both transportation providers and volunteer drivers enrolled as potential ride providers, as noted in Enders and Seekins (Enders & Seekins, 2007). Similarly, during the site visits, some potential riders expressed concerns over long waits for the transportation provider to return to the doctor's office to pick them up following the appointment (e.g. a rider receiving treatment for cancer, like radiation, may not feel well enough to wait). Further, riders who purchased grocery items might have concerns (e.g. milk getting warm or frozen items melting) about waiting for other riders.

One goal of the program is to allow individuals to independently schedule their rides, a concept strongly encouraged in the Literature Review (Seekins, Bernier, & Herron, 1999). One unanticipated hurdle encountered is that some of the older riders may have issues with memory loss, thereby limiting their ability to schedule their rides. DETCOG has addressed this by providing additional support for these

individuals by aiding in scheduling their rides, providing the contact information for the transportation providers to these individuals each time they call, and reminding the individuals how to effectively participate in the program. However, DETCOG sees this as short-term assistance as the larger role staff members take in arranging rides, the more liability they incur (Gonzales, Stombaugh, Seekins, & Kasnitz, 2017). The program has also addressed this challenge by keeping voucher checks at the offices within two housing authorities, allowing residents to receive help booking rides from the office staff.

A unique issue encountered in the DETCOG region, which overlapped with the launch of the pilot transportation voucher program, has been a well-publicized scam involving phone calls targeting individuals sixty and older. Because of this, some of program participants were not answering their phone calls from DETCOG representatives or identified transportation providers. In some cases, this required on-site visits by DETCOG to enroll individuals in the program and communication with an out-of-state family member to assure the individual that the services provided were legitimate. This issue identifies a unique need of setting up a program in a rural area like DETCOG – the need for a trusted, on-site representative. This role was taken on by a DETCOG employee.

Another nuanced issue that has been encountered is the need to clarify with some ride providers that the rider is using the "DETCOG Transportation Voucher Program." Some riders, when attempting to schedule a ride, have been redirected to a phone number to schedule Medicaid transportation, thereby causing confusion. Differentiating between these two sources of transportation and funding is important because as identified in the Introduction, Medicaid funding cannot be used for the trips that the transportation voucher program is seeking to address. DETCOG is working with the ride providers to provide additional clarity and is encouraging riders to state that they are a part of the "DETCOG Transportation Voucher Program" when they are scheduling their ride.

An unforeseen benefit of the program is that it has allowed riders to access other programs housed within DETCOG. For example, an individual may have qualified for Supplemental Nutrition Assistance Program (SNAP) benefits but may not have had the transportation to access this support. Now, with the transportation voucher program in place, individuals can use it to access their SNAP benefits. Access to SNAP benefits provides an additional economic benefit to the region (Tiehen, Jolliffe, & Gundersen, 2012). In addition, while this person may have seen the need for transportation to get them to where they needed to go (e.g. the grocery store), they may not have known that they qualified for SNAP benefits. The extent to which the transportation voucher program has provided additional benefits to participants has not yet been quantified but will be investigated further as the program matures (e.g. through a survey).

DETCOG has been contacting individuals who have been enrolled in the program (e.g. have received information and the check books) but who have yet to use the services available. As noted, at present there are seventeen individuals who fall within this category. There is a concern that a few of these people may only need transportation one to three times a year. Since this program can potentially provide up to about three separate trips a month depending on the destination, it may not be an appropriate fit for people who only need a few trips per year. As an example of why such infrequent use

of the program may be problematic, check books may be lost between each need for transportation. DETCOG is working to develop a modified participation plan for these individuals.

A challenge discussed at the beginning of the project by representatives in one county was the need to address employment access for low-income individuals. The current funding source does not authorize services to address this need. In addition, DETCOG representatives want to ensure the sustainability of the program. As such, the research team worked with DETCOG to identify other potential funding sources. The funding amounts and how the funding can be used vary greatly, from allowing purchase of vehicles and equipment, to funding rides for individuals who are not covered by Older American Act (OAA) funding that is currently available, which only allows participants 60 years of age and older.

Several of the checks received seem to list names that are very similar but appear to be for individuals whose names have different spellings. Closer inspection of this found that many riders have very similar names and DETCOG will need to carefully track these vouchers.

After nine months of operating the transportation voucher program (May through January), it has become clear that some riders are diligently sticking to their budget of $150 a month or $1800 for the year. Other riders are rarely using the program, and some are using more than their allotted amount each month. For now, this appears to be balancing out and the budget can handle those riders who use more than their allotted amount, but as the program grows this could become an issue. To proactively manage this, DETCOG will begin sending out monthly letters to the riders with a list of all the rides they have submitted voucher checks for during each month, the amount they have spent, and the amount remaining. (Note: Sending such information adds additional work for DETCOG staff.) This also allows the riders to validate that all of the rides associated with their name are accurate. Along with this, DETCOG will work to educate those exceeding their allotment on how to effectively manage their transportation voucher budget.

This section summarized the benefits and challenges associated with implementing a pilot transportation voucher program for five counties within the DETCOG region. DETCOG representatives have found that they are better able to address the needs of their constituents by not only identifying additional programming needs, but also by having a program in place that can offer these individuals transportation to access other programs. Challenges encountered to date are identifying if there are some participants who only occasionally need support for travel, addressing how memory loss may inhibit riders from using the transportation voucher program, conveying to users the legitimacy of the program, and conveying to transportation providers who also provide Medicaid transportation the difference between the transportation voucher program travel and Medicaid travel.

The transportation voucher program within DETCOG is a work in progress. While a lot of good information was available regarding how to set-up the program, the focus of the DETCOG program on older individuals initially provided both opportunities and challenges. As the program progresses, program leadership will continue to address some of the challenges and look at the data collected. Using the data on benefits to the elderly, DETCOG will be strategically applying for additional funding

sources to expand this project to address the transportation needs of individuals less than sixty years of age in the DETCOG five-county focus region.

## Connection to Economic Development

Transportation is the second most expensive monthly cost (after housing) in most U.S. households (U.S. Department of Labor, 2018). In discussions with some county representatives, they noted that while access to transportation was a problem for some of their constituents, paying for that transportation was not. Therefore, as the program expands, it can serve individuals who would otherwise not be able to make the trip to the grocery store, beauty shop, restaurant, or elsewhere, which brings additional dollars to businesses and services in the community, thereby contributing to local economic activity and growth. Transportation is known to be tightly tied to the economic well-being of an area, although transportation in-and-of-itself cannot create an improved economy.

East Texas Support Services (ETSS), one of the transportation providers, reported that the agency had previously provided transportation to grocery stores, beauty shops, and the like before a prior program was eliminated. The researchers are still working with DETCOG to determine if ETSS would be willing to share information regarding whether or not the agency's services have: 1) increased an employee's hours, and/or 2) generated an increase in revenue.

Anecdotally, DETCOG identified that many participants in the transportation voucher program have reported benefits such as improved health and well-being, improved access to transportation, and greater independence. DETCOG staff also specifically identified that the transportation voucher program has enabled them to not only make more candidates aware of SNAP benefits, but also allows individuals enrolled in the program to use their SNAP benefits. As noted by Tiehen et al. (Tiehen, Jolliffe, & Gundersen, 2012), SNAP benefits "significantly improve the welfare of low-income households."

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# Appendix A – Demographic Summary

## Introduction

The most recent *Comprehensive Economic Development Strategy* was developed by the Deep East Texas Council of Governments (DETCOG) & Economic Development District (EDD) in 2014, reporting data from 2010 to 2013. The document provides critical demographic information supporting the need for the development of a transportation voucher program in DETCOG, which is summarized below. An update to this document will be completed in 2018 and is slated for publication in 2019, reporting data through 2018. A second key information source is the 2017 Regionally Coordinated Transportation Plan from DETCOG, that provides much of the demographic information reported here.

## Summary Demographics

The twelve counties that make up the DETCOG are considered rural with populations shown in Table 1. The five DETCOG counties of key importance to this project are Jasper, Newton, Sabine, San Augustine, and Tyler where a pilot transportation voucher system will be established as part of this research effort. The population in all DETCOG counties (379,076 (2013 numbers)) represents about 1.4% of the total population in Texas. Generally, the population of the DETCOG counties is very low-density, except for Angelina, Polk, and Nacogdoches counties. The population change in DETCOG counties hovers near zero at 0.2%. Overall growth is projected for half of all DETCOG counties, except for Jasper, Newton, Sabine, San Jacinto, San Augustine, and Tyler Counties [of which five are the pilot counties for testing the voucher program]. The isolation from metropolitan areas, rural nature, and limited accessibility due to lack of interstate highways or regional airports have led to limited job opportunities in DETCOG. This may change in part with the expansion and improvement of various state and interstate highways.

It can be seen in Table 1 that the most transit dependent populations, those 15 years and under and 54 years and older represent 43% of the population in DETCOG. The DETCOG region is a popular retirement area, which explains the high number of individuals in older age groups. Additionally, approximately 30% of the DETCOG population is Veterans.

Overall job growth is anticipated at about 13% for DETCOG; however, the job growth is not broken down by county. Instead, the expected job growth is analyzed by industry, so it may be worthwhile to look at the major industries in each county (Jasper, Newton, Sabine, San Augustin, Tyler) to assess job growth and potential ride partners from these businesses.

The ethnic composition of DETCOG is currently 70% white (non-specified), 15% black, 12% Hispanic, 0.6% American Indian, 0.6% Asian/Pacific Islander, and 0.3% other; with the Hispanic population growing at the fastest rate.

As is shown in Table 3, approximately 10% to 20% of the population under 65 years old in DETCOG have some form of disability. Special considerations may be needed to ensure that people with disabilities are ensured equal access to transportation.

**Table 3. Summary of DET population that has a disability (*this is under the age of 65). Modified from RCTP DETCOG** (Deep East Texas Council of Governments (DETCOG), 2017)**.**

| DETCOG County | Percent of population with a Disability (%)* |
|---|---|
| Angelina County | 14.7 |
| Houston County | 12.4 |
| **Jasper County** | **14.8** |
| Nacogdoches County | 10 |
| **Newton County** | **14.3** |
| Polk County | 12.1 |
| **Sabine County** | **13.5** |
| **San Augustine County** | **20.4** |
| San Jacinto County | 12.9 |
| Shelby County | 11.8 |
| Trinity County | 19.4 |
| **Tyler County** | **16.6** |

The average median household income for a DETCOG household in 2014 was $37,762 (with a range of $29,293 (San Augustine County) to $46,969 (San Jacinto County)), which is 25% below the state average. Wages earned by about 20% of the DETCOG population are considered below the poverty level.

In terms of vehicle availability in DETCOG, approximately 6% of DETCOG households have no vehicle. The number of vehicles per household per county varies greatly, with Nacogdoches and Angelina Counties having a greater number of no vehicle households (2,041 and 1,484, respectively). When adjusted for population, Houston and Nacogdoches Counties have the highest percentage of households without vehicles (7.8% and 8.6%, respectively), but they are also the most populated counties in DETCOG, and as such have more transportation options often found in urbanized areas. While the more rural counties of DETCOG have smaller populations, generally more households have vehicles. This may be a reflection of the lack of alternative transportation options. Of the five counties where the voucher pilot program was tested, Jasper County has the highest percentage of households without vehicles at 7.3%.

## Potential Users of the Voucher Program

The Statement of Work for this project identified numerous potential users of the transportation voucher program, including Veterans, people with disabilities, older adults, and other transportation disadvantaged individuals. The 2017 Regionally Coordinated Transportation Planning effort reported the following goal: “to provide more efficient and effective public transportation services, especially for priority populations including individuals with disabilities, individuals 65 and older, people with low incomes, Veterans, children and others” (Deep East Texas Council of Governments (DETCOG), 2017). With the “focus of the Regionally Coordinated Transportation Plans to pinpoint the transit needs of older adults, low income persons and individuals with disabilities and prioritize services for these

specific populations," the transportation voucher program seeks to provide transportation resources for these individuals.

Additionally, twenty known/existing riders had already been identified by the Technical Panel at the start of this project. These individuals are a part of the Older American Act (OAA) funded program which provides funding for transportation for individuals 60 years and older. Additional programs are in place that provide transportation to Veterans, but to utilize this funding, the user must be a Veteran and have the transportation provided by a Veteran. While those 60 years and older and Veterans groups have been identified as key populations in need of transportation services, existing services have limited capabilities to serve all those in need. As an example, the researchers were made aware of a regional bus service that served Veterans in a neighboring county but were informed that even if Veterans from an adjacent county could get to that bus service, they would not be allowed to use it. Because the requirement is that a Veteran must receive a ride from a Veteran, the rides that a Veteran is able to access may be limited temporally and geographically. Additionally, the reason for the ride may be in question or outside of what is deemed appropriate by the program. For example, the transportation may only apply for non-emergency medical appointments (NEMT).

## Potential Ride Providers of the Transportation Voucher Program

The 2017 Regionally Coordinated Transportation Plan states that Eastern most DETCOG counties "experience gaps in [transportation] services as they do not have any form of public transit service" (Deep East Texas Council of Governments (DETCOG), 2017). While this may be true, the following ride providers have been identified from the 2017 DETCOG Transit Plan:

- Jasper County
    - **East Texas Support Services**, 80 vehicles, ambulatory and wheel chair accessible. Can only be used for **Medical rides**. 46 employees collect a fare. Run from 5am to 7pm. Contact Terry Hicks (406) 384-9006
    - **Elite Cab Co**, **non-emergency medical taxi**, by appointment, 24/7, fare collected, 8- and 4-person shuttles, private owner. Contact John Sessions (939) 645-1185
    - **Goodwill Industries of Central Texas**, **carpool employees only**, individuals are reimbursed by Goodwill. Contact Kristy Bice.
    - **Hughes Cab Company**, dial-a-ride, 8-person van, 7am to 10pm M-Sat., fare collected. Contact Paul Hughes (939) 637-6388
    - **Work Force Solutions (WFS)** DET, bus tokens/prepaid gas cards, **WFS clients and families**, Federal Funding. Contact Marilyn Hartsook. Jasper County location: 799 West Gibson, Jasper, TX 75951 (409) 384-9031 or (877) 384-9031
- Tyler County
    - **Veterans Office**, shuttle service, **Veterans only**, only for verified medical appointments in Houston. Use Volunteer drivers that need to go through the VA training, which is lengthy. Service is from Tyler county to Houston County. Gaps in service exist when volunteer drivers are not available. Contact Kay (409) 283-2493. Main contact listed: Ellen Craig, Veterans Service Office (409) 238-3751, www.co.tyler.tx.us/default.aspx?Tyler_County/Veterans

  - **East Texas Support Services**, 80 vehicles, ambulatory and wheel chair accessible. Can only be used for **Medical rides**. 46 employees collect a fare. Run from 5am to 7pm. Contact Terry Hicks (406) 384-9006
  - **Hughes Cab Company**, dial-a-ride, 8-person van, 7am to 10pm M-Sat, fare collected. Contact Paul Hughes (939) 637-6388
  - **Work Force Solutions (WFS)** DET, bus tokens/prepaid gas cards, **WFS clients and families**, Federal Funding. Contact Marilyn Hartsook. Jasper County location: 799 West Gibson, Jasper, TX 75951 (409) 384-9031 or (877) 384-9031
  - **Nacogdoches Memorial Hospital, medical transport only**, dial-a-ride, 45 vans that seat 4-6 people, M-Sat, pay by vendor agreement. Contact Toni Talent (939) 564-4611
  - **Tyler Transit**, public transportation with five fixed routes and ADA paratransit services which can be scheduled. Located at 210 East Oakwood, Tyler, TX (903) 533-8057 (http://www.cityoftyler.org/Departments/TylerTransit.aspx)
- San Augustine County
  - **East Texas Support Services**, 80 vehicles, ambulatory and wheel chair accessible. Can only be used for **Medical rides**. 46 employees collect a fare. Run from 5am to 7pm. Contact Terry Hicks (406) 384-9006
  - **Elite Cab Co**, **non-emergency medical taxi**, by appointment, 24/7, fare collected, 8- and 4-person shuttles, private owner. Contact John Sessions (939) 645-1185
  - **Goodwill Industries of Central Texas**, **carpool employees only**, individuals are reimbursed by Goodwill. Contact Kristy Bice (903) 593-8438.
  - **Hughes Cab Company**, dial-a-ride, 8-person van, 7am to 10pm M-Sat, fare collected. Contact Paul Hughes (939) 637-6388
  - **Work Force Solutions (WFS)** DET, bus tokens/prepaid gas cards, **WFS clients and families**, Federal Funding. Contact Marilyn Hartsook. Jasper County location: 799 West Gibson, Jasper, TX 75951 (409) 384-9031 or (877) 384-9031
- Sabine County
  - **East Texas Support Services**, 80 vehicles, ambulatory and wheel chair accessible. Can only be used for **Medical rides**. 46 employees collect a fare. Run from 5am to 7pm. Contact Terry Hicks (406) 384-9006
  - **Goodwill Industries of Central Texas**, **carpool employees only**, individuals are reimbursed by Goodwill. Contact Kristy Bice (903) 593-8438.
  - **Hughes Cab Company**, dial-a-ride, 8-person van, 7am to 10pm M-Sat, fare collected. Contact Paul Hughes (939) 637-6388
  - **Work Force Solutions (WFS)** DET, bus tokens/prepaid gas cards, **WFS clients and families**, Federal Funding. Contact Marilyn Hartsook. Jasper County location: 799 West Gibson, Jasper, TX 75951 (409) 384-9031 or (877) 384-9031
  - **Nacogdoches Memorial Hospital, medical transport only**, dial-a-ride, 45 vans that seat 4-6 people, M-Sat, pay by vendor agreement. Contact Toni Talent (939) 564-4611
- Newton County
  - **East Texas Support Services**, 80 vehicles, ambulatory and wheel chair accessible. Can only be used for **Medical rides**. 46 employees collect a fare. Run from 5am to 7pm. Contact Terry Hicks (406) 384-9006

- **Hughes Cab Company**, dial-a-ride, 8-person van, 7am to 10pm M-Sat, fare collected. Contact Paul Hughes (939) 637-6388
- **Work Force Solutions (WFS)** DET, bus tokens/prepaid gas cards, **WFS clients and families**, Federal Funding. Contact Marilyn Hartsook. Jasper County location: 799 West Gibson, Jasper, TX 75951 (409) 384-9031 or (877) 384-9031

Additional transportation provided in DETCOG includes:

**Brazos Transit District**, public transportation providing fixed routes, ADA paratransit services, and demand response services. Paratransit services are scheduled and must be within ¾ mile of a fixed route. (800) 272-0039 http://www.btd.org/

- Provides the following service in:
  Bryan/College Station – fixed route, paratransit, demand and response, TAMU Express, Roy Kelly Parking garage
  Cleveland - fixed route, paratransit, demand response
  Dayton – Liberty and Dayton Community Circular, paratransit
  Liberty - Liberty and Dayton Community Circular, paratransit
  Livingston – Charles Wilson VA Shuttle, demand response
  Lufkin - fixed route, paratransit, demand response, Charles Wilson VA Shuttle
  Nacogdoches - fixed route, paratransit, demand response
  Montgomery County – Town Center Trolley in the Woodlands, demand response (only outside of the urbanized area)

Transportation providers listed by the East Texas Aging & Disability Resource Center (ETxADRC) (http://www.etxadrc.org/resources/transportation/, (855) 937-2372) include:

- Go BUS (http://www.gobustransit.com/), described as East Texas COG's rural transportation system, which serves the 14 counties of East Texas. (Note: It does not serve any of the DETCOG counties). (800) 590-3371. Service provided from 6:30 a.m. to 5:30 p.m. M-F, demand response based on availability, book up to one week in advance. Have a fleet of 60 vehicles but run 30-35 vehicles a day that carry about 10 passengers, and wheelchair capable. Fee paid by cash, check, money order, or passes. Non-profit, federal and state funding through TxDOT.
- Texas Medicaid and CHIP-Medical Transportation Program – medical transport for non-emergency rides for people who have no other way to get to their Medicaid health-care visits. (877) 633-8747

Additional transportation service providers are known for the other counties in DETCOG (see (Deep East Texas Council of Governments (DETCOG), 2017), pg. 9) and will be explored as needed and as the project grows beyond the pilot phase in the selected five counties (Jasper, Newton, Sabine, San Augustine, and Tyler).

## Conclusions

Based on the documentation available, DETCOG has many population groups needing transportation including elderly, Veterans, individuals with disabilities, and individuals with limited access to

transportation. While there appears to be more than a few transportation options for individuals in the rural counties of DETCOG, it is important to note that many of these providers can only serve specific populations, may not allow all types of transport, or may not be trained or equipped to provide transportation for individuals with specific disabilities.

## Appendix B – Literature Review Summary

The first table provides a list of documents, reports, journal and conference papers, presentations, and websites that have been reviewed along with a description. Then after, a table presents lessons learned from reports that were particularly relevant for setting up the DETCOG transportation voucher program.

| Title | Description |
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| *Assess and Monitor the Distribution and Use of 5310 Funds between Rural and Urban Areas (2011)* http://rtc.ruralinstitute.umt.edu/community-participation-independent-living/project-assess-and-monitor-the-distribution-and-use-of-5310-funds-between-rural-and-urban-area/ | The lack of accessible transportation is consistently one of the most highly-rated problems facing people with disabilities living in rural communities and those who serve them. The authors conducted a series of studies to assess the use of SAFETEA-LU (2005) Section 5310 transportation funding for providing transportation in rural communities. The authors found that the Federal transportation programs allocate disproportionately fewer funds to rural areas than to urban areas. In another study, however, states used Section 5310 funds to create and sustain rural and suburban transportation programs. They analyzed all state management plans and found that rural communities followed four pathways to develop local transportation services. In each example they provide specific recommendations for policy revision and practice. |
| *Allocation and Use of Section 5310 Funds in Urban and Rural America (2007)* http://www.nctr.usf.edu/jpt/pdf/JPT%2010-1%20Seekins.pdf | This document outlines how Section 5310 of the SAFETEA-LU (2005), a Federal program for capital assistance, can be used to address mobility needs of elderly and persons with disabilities. The project identified 4,825 Section 5310 recipients in 49 states and Washington, D.C. and conducted a survey of 750, or 1.5%. The results of the survey are presented. This information source was used to identify uses of Section 5310 funding as it applies to this project and outline the many ways this funding can be used to generate creative transportation options. |
| *Develop and Evaluate a Voucher System for Increasing Access to Transportation for People with Disabilities Living in Rural Areas (1999)* http://rtc.ruralinstitute.umt.edu/community-participation-independent-living/project-develop-and-evaluate-a-voucher-system-for-increasing-access-to-transportation-for-people-with-disabilities-living-in-rural-areas/ | This research suggested that a major cause of the lack of transportation in rural communities is the lack of resources for transportation. The authors observed several communities that provided resources to consumers for transportation and developed a voucher model from those examples. The voucher model puts resources for transportation into the hands of individual consumers and trusts them to use their knowledge and skills and vouchers to organize their own transportation. This model is consistent with **independent living philosophy** and has been shown to create a foundation for organized transportation in communities that previously lacked such transportation. The study partner, Association of Programs for Rural Independent Living (APRIL), conducted a national evaluation of the voucher model and provides a toolkit for implementing the program on its website. |

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| *Faith Based Organizations and Rural Transportation (2006)* https://scholarworks.umt.edu/cgi/viewcontent.cgi?article=1032&context=ruralinst_independent_living_community_participation | This research effort investigated the concept of Faith Based Organizations (FBOs) that help provide transportation in rural underserved areas. The authors found a lack of vehicles owned/operated by FBOs, and identified other barriers prohibiting them from transporting community members. A survey was conducted to gather information on FBOs' role. The results found about a third of those surveyed partner with FBOs to conduct outreach activities, but less than 10% reported working with FBOs to provide transportation. About half of the respondents said they were very willing to work with FBOs. Barriers to working with FBOs include: 1) insufficient resources to purchase/operate additional vehicles, 2) insufficient staff, 3) concern about liability, 4) lack of resources to train FBOs on how to train individuals with disabilities, 4) concern about conflict with religious activities, and 5) transportation is not in the mission. The report goes to on to discuss what is often required to establish FBO transportation. The survey results suggest larger, more "liberal" churches are involved in these transportation programs, which are less common in more rural areas. |
| *Assessing the Potential Involvement of Rural Faith-Based Organizations in Providing Community Transportation for People with Disabilities (2007)* http://rtc.ruralinstitute.umt.edu/community-participation-independent-living/project-assess-the-potential-involvement-of-rural-faith-based-organizations-in-providing-community-transportation-for-people-with-disabilities/ | Transportation advocates often believe that faith-based organizations can fill the gap in rural transportation. A national survey of faith-based organizations was conducted and found that contrary to popular views, rural churches did not own many vehicles and of those that owned vehicles, they lacked accessibility features, were old, and in disrepair. Moreover, many faith-based organizations were reluctant to become involved in providing public services. The authors concluded that faith-based organizations did not in fact offer a viable solution. |
| *Faith Based Organizations: Potential Partners in Rural Transportation (2007)* https://scholarworks.umt.edu/cgi/viewcontent.cgi?article=1031&context=ruralinst_independent_living_community_participation | Building off the work presented above, the same authors investigated the concept of Faith Based Organizations (FBOs) to help provide transportation in rural underserved areas. They found a lack of vehicles owned/operated by FBOs, and identified other barriers prohibiting them from transporting community members. |
| *A Review of Federal Transit Administration (FTA) Section 5310 Program's State Management Plans: A legacy program in transition (2009)* https://scholarworks.umt.edu/cgi/viewcontent.cgi?article=1035&context=ruralinst_independent_living_community_participation | This document provides a historical context for equal opportunity of elderly and disabled people to access transportation, an evaluation of existing use of federal funds to achieve this, and recommendations to improve management. The document provides an analysis of pre- and post- ADA outcomes of the 5310 program and inclusive transportation for everyone. The researchers identified ambiguous language in many states' transportation plans, |

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| | making determination of project outcomes difficult to determine. This report notes that 5310(a)(1) funding is designed to fill the gap and function as a safety net for transportation services that are unavailable, insufficient, or inappropriate; however, it was noted that there is little guidance in the definition of these terms. The report notes that some states have used this funding to build integrated, accessible transportation for the general public where none was previously available or used this funding to supplement rural/or regional transportation systems. The document makes forty-five policy recommendations as well as identifies areas for further research and key indicators for progress/change, one of which is the continued evaluation of existing programs to ensure they are serving *all* populations. In addition, the report recommends employing performance-based outcomes in the evaluation of programs using 5310 funds. |
| *Filling the Gaps in Accessible Transportation (2011)* https://scholarworks.umt.edu/cgi/viewcontent.cgi?article=1027&context=ruralinst_independent_living_community_participation | This policy brief looks into the feasibility of consolidating the three main funding programs for rural transportation to increase integration and transportation system accessibility; allow for flexibility in planning, coordinating, and implementing; and reducing the state and local administrative burden. This paper discusses what is needed for consolidation to occur and makes the following recommendations:1) establish a set of consistent outcome measures, 2) establish mechanisms for data inclusion in the National Transit Database, 3) develop operational Federal definitions, 4) accommodate conversion planning, 5) establish national, state, and local mechanisms for conversion planning, 6) and require financial evaluation. |
| *Models of Rural Transportation for People with Disabilities (2007)* https://scholarworks.umt.edu/cgi/viewcontent.cgi?article=1030&context=ruralinst_independent_living_community_participation | Information is presented as a Rural Practice Guideline. The document reviews public transportation models including fixed-route services, demand-response services, deviated fixed-route services; agency-focused models (e.g. specialized transit models); cooperative models (e.g. coordinated services, brokerages, consolidated services); volunteer and voucher models (e.g. a volunteer system, community inclusion drivers, voucher models); and public-private partnerships (e.g. taxi coupon models, personal ownership). The document also discusses liability and provides resources on this topic. |
| *Rural Transportation Voucher Program for People with Disabilities: Three Case Studies (1999)* https://rosap.ntl.bts.gov/view/dot/4709/dot_4709_DS1.pdf | The lack of transportation is one of the most frequently cited problems facing people with disabilities living in rural areas. This research explores a voucher program for rural transportation. **Three case studies** of programs implementing a voucher framework, supported in part by volunteers, are presented. These demonstrations were conducted in seven very rural, "frontier," counties in South Dakota and Montana. |

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| | One program was administered by an independent living center and two programs were administered by developmental disabilities case management service programs. The vouchers themselves provided a measurement method for evaluating the scope and use of transportation. The analysis shows that 35,000 miles of rides were provided for employment, daily living, evening and weekend social purposes, and non-emergency medical treatment at a relatively low cost ($0.29 per mile, or $28 to $566 annually per person). The document provides a table of how vouchers were allotted, requirements of volunteer drivers, and a description of the role of each Community Transportation Coordinator (CTC). |
| *Federal Transit Administration - Grant Programs* https://www.transit.dot.gov/grants/13093_3549.html | The website identifies all Federal Transit Administration (FTA) grants that can be applied for to receive transportation funding. Specific to this project are: 1) the Enhanced Mobility of Senior & Individuals with Disabilities - Section 5310 and 2) Formula Grants for Rural Areas - 5311 grants. |
| *Formula Grants for Rural Areas United States Department of Transportation (USDOT) Federal Transit Administration* https://www.transit.dot.gov/funding/grants/formula-grants-rural-areas-fact-sheet-section-5311 | This document is a Fact Sheet reviewing the FTA grant for Rural Areas (5311). |
| *Association of Programs for Rural Independent Living (APRIL) Transportation Voucher Project: Operation and Results (2006)* https://www.april-rural.org/index.php/35-about-us/statement-facts/53-transportation-voucher-project | This document is a demonstration of the TRAVELER'S CHEQUE (TC) program that was designed to explore the strategy of using vouchers for transportation provision to support people with disabilities living in rural areas and to provide effective strategies for addressing this important problem. The demonstration focused on how small towns and rural communities can successfully organize and operate a flexible supported transportation programs **for people with disabilities**.<br><br>The goal of the project was to demonstrate the effectiveness of a voucher model to provide *employment-related* transportation for people with *disabilities* who live in rural areas. Ten sites were selected to provide diversity in geographical location, disability population served, availability of transportation resources and population density. Implementation of the voucher model at each of the ten sites was evaluated. Operational strategies and resource materials were developed, and technical assistance was provided to the sites. An outcome of this effort was a national summit on accessible rural transportation and |

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| | development of a replication kit that communities can use to operate a traveler's cheque program. |
| *Transportation Funding Update and Information (2017)*http://rtc.ruralinstitute.umt.edu/www/wp-content/uploads/Transportation-Funding-information.pdf | This document provides an update on APRIL's 1999 Toolkit for Operating a Transportation Voucher Program. Specifically, the document addresses the merging of 5317 (New Freedom) and 5316 (Job Access & Reverse Commute (JARC)) funding programs into other programs. The document provides a link to grant programs and fact sheets. |
| *Comprehensive economic development strategy, Deep East Texas (2014)* (No website available) | This was a key resource for the demographics summary and the voucher project. Most transportation services are provided through 5310 funding, Health and Human Services (HHS), Texas Workforce Programs, or private transportation services. |
| *Regionally Coordinated Transportation Plan 2017* http://www.detcog.org/LinkClick.aspx?fileticket=rtmNV3J2oZ8%3D&tabid=120 | This was a key resource for the demographics summary and the voucher project. |
| *Mobility Management Service Review - Literature Review on Voucher Best Practices* http://www.aaa1b.org/wp-content/uploads/2011/02/RFP-Literature-Review.pdf | This document provides an overview of why a voucher program may be selected in a community, presents models on how to operate a voucher program, and provides **three case studies** of implementation in Wyoming, Iowa, and South Carolina. Advantages and disadvantages of the check book and i-voucher models are discussed. |
| *Transportation Voucher Program Basics - Michigan Developmental Disabilities Council Transportation Working Group* (No website available) | This document is a presentation on the Transportation Voucher Program Basics, how it was set up and why, success stories from the program, benefits to users and drivers, and lists of community partners. |
| *Accessible Rural Transportation: An Evaluation of the Traveler's Cheque Voucher Program (2010)* http://www.tandfonline.com/doi/abs/10.1080/15575330.2006.10383112 | The paper reports the use of the voucher program. Ten community programs in ten states provided transportation for 588 adults with disabilities. 92,587 rides covering 1,018,391 miles cost on average $0.39 per mile. Rides were primarily used for employment and employment preparation, with 171 individuals securing either part-time or full-time employment through the program. This report found travelers cheques were very effective, easily implemented, aided people in seeking their own employment, were low cost, and were affordable in rural communities. The traveler's cheques program supports independent living. |
| *Uber, for Rural Nebraska (2016)* https://www.theatlantic.com/busine | This article discussed the development of the LibreTaxi program in Nebraska to provide 24-hr transportation in rural areas. |

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| ss/archive/2016/07/rural-ridesharing-nebraska/491360/ | |
| *Ridesharing works in rural America* (No website available) | This is an article on a ridesharing experiment in northeast Kansas. Discusses Lyft, Uber, and Carma apps to share rides. Discusses a "hitch hiking" option that has both drivers and rider vetted with background checks. |
| *Q&A: LibreTaxi's Roman Pushkin on Why he made a free, open-source alternative to Uber and Lyft. (2017)* https://www.shareable.net/blog/qa-libretaxis-roman-pushkin-on-why-he-made-a-free-open-source-alternative-to-uber-and-lyft | The article provides information on the cash based open source app for getting rides. The document notes that it is not designed to compete with Uber and Lyft. |
| *Volunteer Driver Programs in Minnesota: Benefits and Barriers (2017)* https://conservancy.umn.edu/handle/11299/189303 | The study documents an organization that uses volunteer drivers to help meet the transportation needs in Minnesota, how it organizes and funds its volunteer driver programs, challenges this organization faces in continuing to provide these services with volunteer drivers (this includes issues with insurance coverage), recommendations on identified barriers that could be most productively addressed, and methods for addressing identified barriers. The project involved a survey of transportation providers that use volunteers and a review of current regulations. The study found: 1) the flexibility and lower cost of volunteer drivers creates a valuable and useful service that could not be replicated at the cost; 2) demographics (e.g. a large number of older Americans with fewer younger Americans able to drive these individuals to desired destinations) and regulatory changes are combining to threaten the continued viability of these services; and 3) while demographic issues cannot be easily addressed, regulatory issues related to insurance could be improved to promote rather than discourage volunteers from driving. Recommendations included amending Minnesota's laws and regulations to improve the clarification between volunteer drivers and transportation network company (TNC) subcontractors/employees (e.g. Lyft, Uber), and that additional incentives like reimbursement for "no-load" miles could be offered to attract more volunteer drivers. |
| *Transportation Services for People with Disabilities in Rural and Small Urban Communities (2006)* http://www.nadtc.org/resources-publications/transportation-services- | This is a summary report of a longer report with the same title. The report summarizes a literature review and outreach efforts. The report summarizes current issues and challenges faced by existing service providers, including limited funding, limited trip purposes, client-only transportation, limited day and hours of service, lack of long-distance transportation, the |

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| for-people-with-disabilities-in-rural-and-small-urban-communities/ | high cost of transportation, accessible vehicles and equivalent service, more limited use of advanced technologies, driver training, and lack of information. The report discusses federal and state level funding sources, and innovative funding options; coordinated services; **voucher programs**; flexible services such as route deviation, point deviation, demand-responsive, requested stops, flexible route, and zone route services; use of taxicabs, volunteer drivers; strategies to encourage use of existing transportation services; use of technology; and training. |
| *Wyoming Independent Living, Inc. - Transportation Check Program* http://www.wilr.org/programs/transportation-check-program | The website provides information on the **transportation voucher program** in Wyoming including eligibility, location, and resources. |
| *Living Independent Network (LIN) Corporation - Voucher Program* https://www.ruralhealthinfo.org/community-health/transportation/3/living-independence or https://lincidaho.org/program/transportation/ | The website provides a very brief overview of the **voucher program** used in Twin Falls, Idaho. |
| *Center for Independent Living for Western Wisconsin - New Freedom Transportation Program* https://www.ruralhealthinfo.org/community-health/transportation/3/western-wisconsin or http://www.cilww.com/ | The website provides a very brief overview of the **voucher program** used in Menomonie, Wisconsin. |
| *Grantmakers In Aging - Volunteer Driver Programs* https://www.giaging.org/issues/volunteer-driver-programs/ | This website provides historical perspective on the importance and role of volunteer drivers in providing transportation for the aging public. A list of resources is provided as well. |
| *Non-Emergency Medical Transportation (NEMT) Advisory Committee Request for Information* https://www.leg.state.mn.us/docs/2013/mandated/130963.pdf | Minnesota requested information from vendors on solutions for the management of non-emergency medical transportation (NEMT) services. Responses from seven agencies/counties/groups were collected. In addition to this, the document outlines the flow of communication for coordinating rides, and provides a link for brokering/managing, reporting and evaluating program use. This document also reviews the potential benefits of having a single statewide coordinator for NEMT requests. |

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| *Volunteers Enlisted to Assist People (VEAP)* (Website for organization) https://veap.org/get-help/veap-programs/ | VEAP provides a range of services. Of relevance to this project, the transportation program provides 1) rides home from the pantry, and 2) shuttles for seniors. Rides home from VEAP's Food Pantry are for community members with transportation barriers who access VEAP by public transit, family, and friends or other transportation options. Over 50% of these rides are for seniors. Shuttles for Seniors is a partnership with living facilities for seniors living on limited incomes who are in need of healthy food support. VEAP shuttles residents to and from VEAP's Food Pantry, assuring seniors' nutritious foods needs are being met. |
| *How many New Brunswickers rely on organized volunteer driver programs? Preliminary tools and approaches to help us find the answer* (http://ctrf.ca/wp-content/uploads/2017/05/CTRF2017HansonGoudreauPublicTransit.pdf) | This project is the first effort to create a uniform data collection method for Volunteer Driver Programs (VDPs) in **Canada**. The report highlights the need for defining trips and stops, and consistent recording of data. Though the researchers suggest that drives/trips and stops were clearly defined for the programs, they were not clearly understood and the data was not recorded for each consistently. Data recommended for recording included:<br>• Date, start time of drive<br>• Unique driver ID number<br>• Number of clients/users & escorts<br>• Distance travelled<br>• Number of stops<br>• Purpose of stops<br>For user data they recommended also collecting:<br>• Date, start time, purpose of each stop<br>• Each stop for each user with a unique ID number (in some cases, multiple users share a common driver ID, which indicates that multiple people are in the same vehicle but making different stops).<br>This data was not collected consistently by everyone, or consistently recorded (e.g. sometimes it was recorded other times it was not). They recommend using two separate spreadsheets: one for driver information and one for user information.<br><br>Data and statistics are provided showing:<br>• An average of 21 volunteer drivers<br>• An average of 105 clients<br>• An average of 660 drives provided, and<br>• An average of 49,200 km driven.<br>Overall data indicates that 400 individuals use the five programs in which data was collected for this project, for an average of 8 trips per year from 80 volunteer drivers. |

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| | The purpose of travel was most commonly for health (medical) (56%), life maintenance (shopping, etc.) (20%), and work/education (17%). The data shows that trips for work/education were most likely to be shared rides, whereas health and life maintenance were most frequently single passenger trips. On this note, health trips were found to have the lowest utilization of persons per drive (shared rides), but had the longest travelled distances, and took place during work hours.<br>Most clients used the program to receive 1-10 trips. Most trips were two stops (68%), with about 20% of trips having 3 to 4 stops.<br>An outcome of this effort was the development of a spreadsheet tool to aid in consistent data collection. |
| *The development and application of a Maturity Model to understand volunteer driver program practices* http://ctrf.ca/?page_id=5148) | This work summarizes best practices used in VDPs based on the maturity model developed within. The following Key Practices (KP) used in the analysis were:<br>• Volunteer driver recruitment and retention<br>• Service Delivery (Quality Assurance)<br>• Cost Effectiveness and Funding<br>• Leadership and Management<br>• Risk Management<br><br>Survey responses from rural VDPs in New Brunswick indicate that VDPs can be broken down into:<br>• Small - 50 or fewer riders, budgets not reported, have one half time staff, and 65% of rides are for riders 65 yrs and older.<br>• Medium – 50 to 100 riders, budget of ~$55,000, about 1.5 times staff, with about 50% of rides are for riders 65 yrs and older.<br>• Large – 100 to 300 riders, budget of ~$141,000, about 1.7 times staff, percent of rides for riders 65 yrs and older not reported.<br><br>The analysis found that medium-sized VDPs showed the highest maturity levels of Key Practices. The authors suggest that an increase in sophistication of practices is needed to increase from a small VDP to a medium VDP, but to then grow to a large VDP is much easier if these Key Practices are already in place.<br><br>Key Practices that are common at high levels of maturity in VDPs include:<br>• Perform criminal background check on potential volunteers<br>• Record organizational statistics |

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| | • Pursue multiple funding sources<br>• Determination of reimbursement rates by the organization<br>The authors note that some Key Practices may be transitional in nature, and necessary in certain phases of program development. However, this was not explored further. |
| *Understanding the supply of and demand for volunteer driving in Canada: Knowledge sources, gaps, and proposed framework for future research to support transportation planning for older adults* (https://trid.trb.org/view/1494915) | The work reviews statistical data collected on VDPs. Some relevant and interesting survey findings include:<br>• Half of all volunteer drivers in Canada are 35 – 54 years old.<br>• About 5% of volunteers provide about 60% of the volunteer hours.<br>• Canadians age 65-74 yrs volunteer the largest numbers of hours overall, but those aged 55-64 yrs provided the highest number of volunteer driving hours. This may be because they have greater time availability and flexibility having transitioned out of the work force.<br>• While data is not reported for volunteer trip purposes, the greatest number of volunteer hours contributed by organization in Canada are Culture & Recreation, Social Services, and Religion.<br>The author also identified key research needs to support VDPs. |

| Title | Description | Lesson Learned |
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| *Rural Rides: Providing Rideshare Matching, Volunteer Drivers & Other Solutions for Low-Income Earners (2010)* http://web1.ctaa.org/webmodules/webarticles/articlefiles/RuralRides_Minnesota.pdf | To aid low-wage earners commuting long distances across very rural areas, Rural Rides (supported by the Minnesota Workforce Center, Arrowhead Economic Opportunity Agency and Arrowhead Transit) provides: 1) rideshare matching, 2) volunteer driver services, and 3) individualized transportation planning. Each local workforce one-stop center in the region has an in-house transportation representative to work one-on-one with job seekers. Five hundred individual travel solutions were completed in the first eighteen months of the program. Partners consider Rural Rides **money well spent** and an investment in **getting people to work**. Because the program targets getting people to work, program staff work hand-in-hand with work force center and employers. Additionally, services target areas with low employment rates.<br>First step - inform individuals of available public transportation in the area. Second step - identify a "buddy" working at or near their job site to commute with. | 1. Time limits on transportation support, usually a **three-month maximum**, should be discussed before an individual accepts a job. Customers need to ensure that after three months, they will continue to have a way to travel to the job (but exceptions can be made).<br>2. A driver buddy program is more cost-effective than a volunteer driver program given the amount of administrative support needed to manage the latter.<br>3. A driver buddy program provides the flexibility needed to match **shift workers** with transportation as some employers offer only staggered or split shifts.<br>4. It is a reality that **public transit cannot fulfill all the needs in extremely rural areas**; alternatives that support public transit need to be implemented.<br>5. Outreach to workers' employers is most effective at the direct supervisor or program manager level, where employees' transportation difficulties have the most impact and supervisors are motivated to help employees find solutions. It is also good to share information on transportation options with human resource departments. |
| *Toolkit for Operating a Rural Transportation Voucher Program (2017)* http://rtc.ruralinstitute.umt.edu/resources/transportation-voucher-toolkit/ | This document was put together by the Association of Programs for Rural Independent Living (APRIL) to help serve rural Centers for Independent Living (CIL). APRIL believes the voucher model will play a significant role providing new and expanded transportation options for **people with disabilities** in rural America. | The **role of the Community Transportation Coordinator (CTC) is critical** in effectively implementing and administering the program.<br>The scale of the voucher program can be matched to available funds.<br>The system is a consumer driven program in which participants are involved in developing transportation options that best meet their needs |

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| | Identified advantages of a voucher system for rural transportation include: 1) allows riders more choices in where they work and live, 2) puts resources in to the hands of riders rather than agencies, 3) places emphasis on rider needs rather than agency considerations, 4) promotes rural traditions of volunteers, and 5) promotes cost-sharing among service agencies, riders, and transit providers. The report identified ten demonstration sites of voucher programs (Homer, Alaska; Bainbridge, Georgia; Hays, Kansas; Carbondale, Illinois; Fall River, Massachusetts; Marshall, Minnesota; Pablo, Montana; Zuni, New Mexico; Camp Hill, Pennsylvania; Price, Utah). This is a **very useful document for this project** outlining how a voucher program can work, available tools, and lessons learned. This document serves as tool kit for establishing a voucher program. | and then managing their mobility and arranging for transportation with providers they select.<br>Only a small minority of the riders using the vouchers needed adapted vehicles.<br>The program is highly flexible and adaptable to local conditions. It also utilizes existing local transportation providers, so it is coordinated with local services.<br>For communities with no transportation resources, a voucher project is a band-aid that provides **something where there is nothing**.<br>In communities with some transportation options, a voucher project can: 1) expand the options by providing services during evening or weekend hours, 2) make existing options more affordable, and/or 3) provide service for long distance trips.<br>The voucher program can be started with minimal investment because it uses existing resources. |
| *Making Transportation Work for People with Disabilities in Rural America: The supported volunteer rural transportation voucher program* (1996) https://scholarworks.umt.edu/cgi/viewcontent.cgi?article=1026&context=ruralinst_independent_living_community_participation | This early work reviews the initial Supported Volunteer Rural Transportation (SVRT) Program. The document reviews the philosophy of independent living, how these programs can be funded, and the application process for financial assistance (including cost-sharing, managing voucher programs, how to start a program, record keeping, and what can be expected from the program). The guide reviews how to organize volunteers, volunteer qualifications, required training, volunteer | This document recommends involving consumers in as many ways a possible. This includes encouraging user participation in planning and managing the system, in administrative tasks, and in recruiting and training. The recommendations include having consumers schedule rides as far in advance as possible and limiting transportation to a specific service area. Make sure both consumers and ride providers understand their needs and abilities for accessible transportation. The document also recommends limiting the number of vouchers per consumer per quarter and establishing a system for |

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| | support, and liability. The report provides example documents, budget, and a survey. | dealing with complaints or issues that arise. Finally, the document recommends establishing a policy for rides needed outside the service area to three cities, counties, or states. |
| *Transportation Voucher Programs: Facilitating Mobility in Rural Areas (2008)* (No website available) | This document provides an overview of voucher programs, various payment models (including checkbook and i-voucher), explains why vouchers are used, identifies who has established voucher programs, provides the pros and cons of the various models, and reviews funding sources (federal, state and local). Resource links are provided. | There are **six advantages** of **checkbook** vouchers: 1) they offer greatest consumer choice and control over transportation, especially when a last-minute ride is needed, 2) they are easy for agencies to learn to use, 3) studies have shown that consumers often identify with and enjoy the checkbook model, 4) a training manual for starting a voucher program using the checkbook model is available, 5) the checkbook model has been tried and successfully used in a large number of rural communities, and 6) the model works best when funding is provided by one or more funding sources.<br>There are **three disadvantages** of the **checkbook** model. First, customers who do not read or write need help to complete the voucher. Second, duplicate checks can be written if people become confused or attempt to take advantage of the system. This is rare, and providers have found simple remedies for these problems. Third, the checkbook model generates paper checks which must be stored and tracked. The accumulation of printed checks can be a problem.<br>There are **eight advantages** of the **i-voucher** program. First, it can be used by new or experienced voucher programs and is recommended for sites that have or are seeking multiple funding sources to support vouchers. Second, it offers consumers choice and control. Some limits are set by funding agencies. The customer trades some degree of control for some |

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| | | degree of funding support. Third, it has proven easy to use for consumers who do not read. Fourth, the model allows multiple funding sources to set up, track, and authorize and generate a needed audit trail. Fifth, the software is easy to learn and online training is usually completed in 4-6 hrs. Sixth, it creates new businesses that that may employ people with disabilities. Seventh, it is 508 compliant and has numerous help screens. Eight, iBUSS software automatically generates standard Medicaid Forms.<br>**Four disadvantages** of the **i-voucher** were identified. First, consumers must still call a driver or transit agency to schedule a ride. Second, partners are required to work closely together during any initial startup phases to understand roles and responsibilities and make decisions about rates. Third, online training, while effective at showing the user how to use the software, may not prepare the user to coordinate with multiple partners. Fourth, bookkeeping features may not be compatible with systems already in use by a transit provider or service agency. |
| *Rural Health Information Hub - Voucher Models* https://www.ruralhealthinfo.org/community-health/transportation/2/models-to-improve-access/voucher-models | The website serves as an information source specifically discussing voucher models and provides examples from the Living Independence Network Corporation (LINC) and the Wyoming Independent Living's Transportation Check Program. Information is presented on considerations for implementation of a voucher program. The website also provides resources for more information. | Three considerations for implementation were identified. First, the flexibility by the customer in terms of scheduling rides. Second, the success of the program will come down to community partnerships. Third, the available transportation modes in the community. |

## LITERATURE REVIEW CONCLUSIONS

From the literature review process the following key documents were identified for use in the development of a voucher program for use by DETCOG. These documents include:

> *Toolkit for Operating a Rural Transportation Voucher Program* (2017), APRIL Association of Programs for Rural Independent Living.
>
> *Transportation Services for People with Disabilities in Rural and Small Urban Communities, Summary Report* (2006), National Aging and Disability Transportation Center (NADTC)
>
> *Transportation Voucher Program Basics*, Michigan Developmental Disabilities Council Transportation Work Group

These documents, and the others reviewed, were used in the development of the voucher program. To provide efficiency and learn from other similar transportation programs, the identified lessons learned were incorporated into the program design where feasible, or at least considered for all relevant aspects of voucher programs.

Information specific to the use of vouchers suggests that the purpose of ride is highly variable. The reason for the trip is driven by the needs of those in the program, such that if someone participates in a voucher program to help support gaining employment or getting to work, the vouchers will likely be used for that purpose. The same is true for those needing medical care; vouchers can be expected to be used for medical related rides. It is interesting to note that in very rural areas, one study found vouchers were saved up to allow for longer trips to go shopping or visit family.

Information on requirements of volunteer drivers were generally the same including proof of a valid driver's license, proof of insurance, and a good driving record. All three of these items need to be verified by the CTC.

Information on determining who qualified to receive vouchers varied greatly based on the needs in that community and purpose for establishing the voucher program, but in all cases, **the CTC was responsible for determining who qualified** for the program.

## Appendix C – Draft Applications

Brookshire Brothers

# SUPPORT DETAILS

**Amount Requested**

$4,500.00

**Date of Event**

[ 8/24/2018 ]

**Reason for Donation Request**

In May of 2018, the Deep East Texas Council of Governments (DETCOG) began the Transportation Voucher Program. The intent of this program is to address the needs of those who have limited access to transportation to get to doctors' appointments, the grocery stores, and for social visits. Since its beginning in May, 146 trips have been provided. Of these, just under sixty-five percent of the trips were reported as being for shopping. Medicaid/Medicare, while providing for trips to and from doctor's appointments, do not address accessing good food to support a healthy lifestyle. The funding requested above will be to support low-income, mobility restricted individuals within the counties of San Augustine, Sabine, Tyler, Jasper and Newton in performing necessary shopping trips. The amount was derived from 63% of the July total ($2,108) multiplied by 3 months, thereby reflecting funding for three months that can be provided to allow individuals to access grocery stores, thereby allowing approximately forty individuals access to groceries.

**Type of Donation Requested**

While a monetary donation is requested to support travel to grocery stores, DETCOG invites Brookshire Brother employees to sign-up as volunteer drivers, thereby allowing the program to grow in a sustainable fashion which allows people to access the healthy food they need.

**If Merchandise support is requested, specify exact description and quantities requested (the total amount will be placed on a gift card to be used within the store):**

Merchandise support is not requested.

Wal-mart, Draft Letter to Verify DETCOG as a Potential Recipient

**Deep East Texas Region of Governments (DETCOG)**

**210 Premier Drive**

**Jasper, Texas 75951**

**409-384-5704**

**https://www.detcog.net/**

October 31, 2018

To Whom it May Concern:

This letter is to verify that the Deep East Texas Council of Governments (DETCOG) is a certified agency as recognized by the State of Texas. DETCOG was officially created on X by X. I authorize DETCOG to apply for funding from Walmart and the Walmart Foundation for the betterment of the region.

Sincerely,

Lonnie Hunt

DETCOG Executive Director

# Appendix D – Transportation Voucher Policies and Procedures

## Bookkeeping

DETCOG will be responsible for managing the funds, budget, checks, and reimbursement to ride providers. An Excel file [Traveler-Cheque-Workbook.xls] developed by a previous research project is provided as a guideline for tracking riders, ride providers, voucher check use, and related information.

## Trainings

***See trifold pamphlet for program details.**

Training of riders and ride providers should occur prior to enrollment in the transportation voucher program. Additional training should be completed as is needed (quarterly/bi-annually) to remind participants of rules and regulations, provide support for riders and ride providers, and as new riders and ride providers are enlisted in the program. The later will likely occur on an "as needed" basis, such as individuals contacting DETCOG or if volunteer drivers become available. If needed monthly, quarterly, bi-annual, and/or annual training events can be scheduled by DETCOG in various locations (e.g., the five participating counties (Jasper, Newton, Sabine, San Augustine, and Tyler), Veterans Service offices, nutrition centers, housing authorities, and at DETCOG).

## Information for Riders

If you are interested in participating in the transportation voucher program as a rider please contact [name] at the DETCOG office at [phone #] or via email at [email address]. [Name] will aid in providing the necessary training on how to participate in the transportation voucher program, including;

1) how to qualify to be a part of the transportation voucher program (eligibility information, at this time based on the funding source),

2) an overview of how the transportation voucher program works,

3) how many dollars each person can use over a time period (starting with $150 per person per month),

4) how the vouchers can be used (e.g. medical appointments, shopping, personal visits, and church),

5) who can provide a ride (volunteers, existing transportation provider with negotiated agreement with DETCOG),

6) how to schedule a ride,

7) how to use the transportation voucher checks,

8) paperwork necessary to participate in the pilot program (enrollment, surveys), and

9) contacts at DETCOG to help/provide support.

The initial training event is typically a 30 to 60 minute session that provides an overview of the transportation voucher program, provides voucher checks, a hands on run through of how to use the checks, how to book a ride (going over the list of approved transportation providers and discussing volunteer drivers), reviews how a volunteer driver can become a part of the program, who the DETCOG point person is and that person's role in the program.

Training Materials

- Transportation Voucher Program Trifold
- List of approved transportation providers, hours, locations, rates, contact information, and lead time to schedule a ride.
- Voucher Checks

## Riders

Who qualifies for the program?

- Elderly, Veterans, and those who lack mobility due to physical, mental or financial challenges**.**

Current riders need to meet the following requirements of the funding source to participate in the transportation voucher program:

- Older Americans Act (OAA) funding – 60 years or older or providing support for someone 60 years or older.
- Other funding sources – To be determined as the program develops.

Rides will be funded by the transportation voucher program using the provided checks. Existing rates per trip and mile (volunteer only) with the transportation providers and volunteers MUST be used. *Transportation voucher checks submitted for reimbursement of amounts that do not match the agreed upon rates will be audited*.

If you can pay for the ride using your own funds, you may do this at the pre-approved rates. If you are paying for the ride on your own, please let the transportation provider know you will be doing this (for tracking purposes only). Please know that you will not be reimbursed by DETCOG if you choose to pay for the trip using your own money.

Paperwork required

- Transportation Voucher Enrollment Form
- Participant contact information

Periodic surveys will be used to track the success of the program; this may include the number of and types of rides taken and from whom, check used, and number of self-paying participants. This information could also be used to help DETCOG reallocate resources as needed.

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DETCOG will check-in with riders as needed, monthly, or quarterly to ensure the program is serving the riders and to answer any questions.

Please note that participation in this program is a privilege, and please be judicious in your use of the funds so as not to inadvertently impact other program participants or result in the termination of the program.

The transportation vouchers are subject to random audits to ensure funds are used for allowable services and for no other purposes.

## Information for Ride Providers

Existing transportation agencies (e.g., East Texas Support Services, Watts, and Brazos) will be trained on how to participate in the transportation voucher program including:

1) how riders will coordinate trips,

2) how riders will pay using the agreed upon reimbursement rate and vouchers, and

3) how to process the vouchers for reimbursement.

The initial training event is typically a 30 to 60 minute session that provides an overview of the transportation voucher program, a hands on run through of the voucher checks (how they will be used by the riders, important information to be included on them, how they should be summited for reimbursement, frequency to submit, and how to receive reimbursement), tracking and record keeping of the checks, and how they will be contacted by the riders. Training will likely be held at DETCOG or at the transportation provider's office.

**Volunteer drivers** will need to be trained as they enter into the program, on a one-on-one basis by DETCOG. Training will be coordinated through [name] at [phone] or via email at [email address]mailto:. Paperwork and documents required for volunteer drivers include:

1) Valid driver's license
2) Proof of insurance
3) Most recent/last vehicle inspection

A copy of this information must be provided to DETCOG to be kept on file prior to providing any rides as a part of the transportation voucher program. Once approved, the volunteer driver will be asked to sign a liability waiver. Once enrolled in the program, the volunteer driver will participate in the mandatory training by DETCOG on how to participate in the transportation voucher program. Once completed, the volunteer driver may then provide rides to those seeking rides as part of the transportation voucher program.

*Volunteer driver documentation listed above must be updated with DETCOG annually or as requested by DETOG as documentation expires.

Training Materials

- Transportation Voucher Program Trifold
- Voucher Checks
- Voucher reimbursement procedures

## Ride Providers

Who qualifies for the program?

Agreements are in place with the following transportation providers to deliver transportation services in the transportation voucher program.

| | |
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| East Texas Support Services | (XXX) XXX-XXXX (name) |
| Watts Transportation | (XXX) XXX-XXXX (name) |
| Jasper and Newton County Nutrition and Senior Services | (XXX) XXX-XXXX (name) |
| Veterans of Tyler County | (XXX) XXX-XXXX (name) |

Other transportation service providers are welcome to participate in the program and should contact DETCOG at (XXX) XXX-XXXX or via email at X for more information.

Vouchers recording: 1) the cost of the trip, 2) purpose of the trip, and 3) the rider who used the service must be submitted (mileage is optional) to DETCOG bi-weekly (every two weeks) for reimbursement. Reimbursement may take up to 30 business days.

## Volunteer Drivers

The volunteer driver will be reimbursed at a rate of $0.545 per mile (the Texas state reimbursement rate) based on the submitted transportation voucher check(s). Vouchers recording the mileage, purpose of the trip, and who used the service (cost of trip is optional) must be submitted to DETCOG bi-weekly (every two weeks) for reimbursement. Reimbursement may take up to 30 business days.

### General Ride Provider Information

Rides will be funded by the transportation voucher program using custom transportation voucher checks. Rates per mile that have already been established with the transportation providers and DETCOG must be used. If the riders can pay for the ride using their own funds, they may do this at the pre-approved rates. If the riders pay for the ride on their own, please track this and report it to DETCOG (for tracking purposes only). Please provide this information to DETCOG monthly, or when checks are submitted for reimbursement.

DETCOG will check in with the ride providers on a quarterly or as needed basis to ensure the success of the transportation voucher program.

**Information for Riders**

The following are some considerations for riders.

Riders may want to ask ride providers the following questions regarding wait time:

- How long will the driver wait at an appointment?
- How long will the rider have to wait to be picked up if the driver left after drop off?

Trip booking

- Please book your trip at least 24 hrs in advance by contacting the ride provider directly.
- If you have any transportation requirement such as a wheelchair accessible vehicle, please inform the driver when you schedule the ride.
- If you plan on make multiple stops and or to include additional individuals in the ride, please inform the driver when you schedule the ride as this may change the rates charged.

Trip cancellation – please make an effort to cancel any scheduled trip at least 24 hrs in advance. Last minute cancellations and schedule changes will be handled on a case-by-case basis. Please contact the ride provider directly to cancel or change an existing ride reservation.

Please note that at this time, transportation vouchers may not be used to transport person(s) to any gaming, casino, or similar facility. If travel to any type of these locations is needed, please contact DETCOG to discuss travel arrangements.

This is a **curb-to-curb service**, meaning the driver will meet you at the curb or on your driveway and drop you off in the same location.

This is **NOT** a door-to-door service where the driver would meet you at your door, escort you to the vehicle, and then after the trip escort you back to the door.

This is **NOT** a through-door service, where the driver would come into your house upon invitation and escort you to the vehicle, and then after the trip escort you back through the door into your home.

The driver can:

- Help you in and out of the vehicle
- Buckle your seat belt
- Help book future trips

The driver cannot:

- Go into your home to help you outside or help you back into to your home.
- Put away groceries.

Food and beverages must be consumed outside of vehicle unless specifically allowed by the driver. Alcohol, tobacco, vape pens, and illegal substances are **NOT** allowed to be consumed inside vehicles. Drivers will report any issues to DETCOG.

### Feedback, Complaints, and Reporting Issues

To submit feedback, concerns or complaints about the program, drivers or staff, please contact DETCOG via phone or email to [name] at [phone number] or via email at [email address].

To report abuse or fraud within the program:

If you have immediate concerns about a ride provider and or your safety, please call DETCOG from the nearest possible location.

- All reported issues will be investigated, and rider and ride providers will be audited on a case-by-case basis.
- If inappropriate use of the vouchers is identified, DETCOG will communicate with the person(s) informing them of the rules and regulations of the program. If needed following this communication, DETCOG may then work with the person(s) to set up trip-by-trip reallocation as needed. Following these steps, the person(s) may experience reduced future transportation vouchers or essential-only transportation voucher use.
- With these guidelines in mind, DETCOG has the right to not reimburse a fraudulent transportation voucher, remove the ride provider from the program, remove the rider from the program, or seek reparations based on the fraudulent claims.

# Appendix E – Training Materials

## 1 CONTACT INFORMATION

Contact the following to:

- answer your questions about the Travel Voucher Program,
- help you find and connect with a transportation provider, and
- help you obtain and use the travel voucher checks.

**Primary Contact: Maria Navarrete,** *Program Specialist, CTC-DETCOG*
(409) 384-5704 x 5324 mnavarrete@detcog.org

**Holly Anderson,** *Travel Voucher Support, DETCOG*
(409) 384-5704 x 5258 handerson@detcog.org

**Donna Sprouse,** *Travel Voucher Support, DETCOG*
(409) 384-7614 X 5255 donna.sprouse@detcog.org

**DETCOG**
210 Premier Dr. Jasper, TX 75951

## 2 TRANSPORTATION PROVIDERS

To book travel using the travel voucher checks, you may contact any of the transit providers listed below. All providers request 48 hour notification.

- **East Texas Support Services**
  Terry Hicks (409) 384-9006
  *Accessibility options: wheelchair, lift*
- **Watts Transportation**
  Mr. Watts (936) 332-0720
  Rates to facilities outside of the counties for medical reasons and trips to Houston and/or Galveston are being negotiated.
- **Jasper and Newton County Nutrition and Senior Services**
  Elaine Shellenberger (409) 892-4455
- **Veterans of Tyler County**
  Kay Timme (409) 283-3751
- **Nutrition and Services for Seniors**
  - A one-way rate is being negotiated that will include 10 miles from the cities of Kirbyville *(Jasper Co)*, Buna *(Jasper Co)*, Evadale *(Jasper Co)*, Warren *(Tyler Co)*, and Deweyville *(Newton Co)* to Beaumont.
  - Riders from these areas who need to go to medical facilities in Houston and/or Galveston will incur an additional cost, probably based on mileage exceeding the one-way rate.
- **Volunteer Ride Providers*** *(see middle panel)*

### * Volunteer Ride Providers

Another transportation option is to use a volunteer ride provider, who can be reimbursed for mileage.

A volunteer ride provider may be a family member, co-worker, neighbor, friend, volunteer from the church, or similar volunteers who can provide transportation using their own vehicle.

### To qualify, volunteer ride providers must

- Contact the DETCOG – CTC *(see previous panel)*
- Submit the following documents to the DETCOG – CTC:

A copy of valid driver's license

A copy of the most recent vehicle inspection

Proof of car insurance

- **Once approved by the DETCOG – CTC** to participate in the travel voucher program, you can contact the volunteer ride provider directly to set up transportation services.

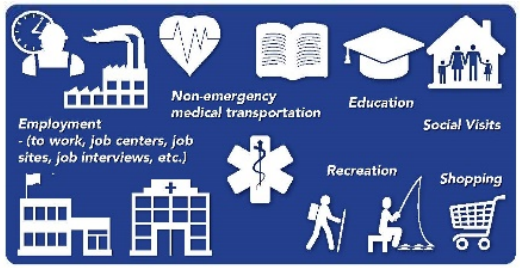
- Volunteer ride providers will be reimbursed for the miles driven at the Texas state reimbursement rate *(currently $0.545/mile)*. For this reason, the **mileage traveled for the use of the voucher must be reported on the voucher.**

## 3 TRAVEL VOUCHER CHECKS

The travel voucher checks are used in place of cash to pay for transportation. Riders may pay for the ride with their own funds at the agreed upon rates. However, neither the rider or ride provider will be reimbursed by DETCOG.

- The travel voucher checks hold no real cash value and can only be used to pay participating transportation providers, who will then be reimbursed by DETCOG.

### Travel voucher checks can be used for




If you have a question about how travel voucher checks can be used, please contact the DETCOG – CTC. We can show you 1) how to fill out your travel voucher check, 2) determine the cost or rates of the transportation provider, or 3) submit the travel voucher checks to the transportation provider.

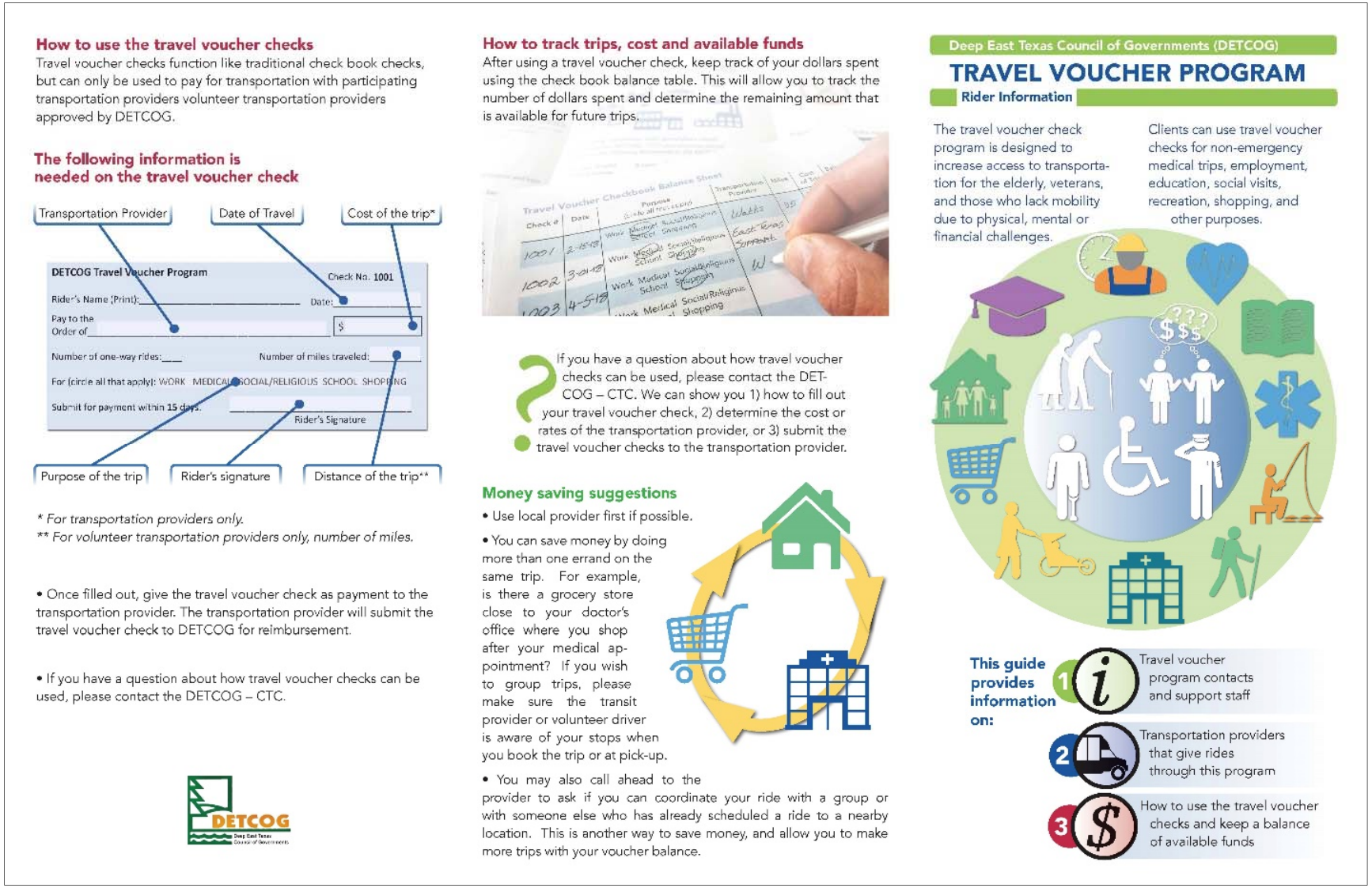



**Figure 9. Trifold training materials explain the Transportation Voucher Program for riders and ride providers.**