



CASE STUDY

BY THE BEVERLY FOUNDATION

Sales Tax Funding for Supplemental Transportation in Riverside County, California

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Partnership to Preserve Independent Living for Seniors and Persons with Disabilities

Nearly any conversation about services for aging adults will eventually turn into a lament about the “need for transportation”. In spite of the passage of the American Disabilities Act in 1990, and the often valiant efforts of transit agencies across the country to provide mandated, but unfunded, special access services for persons with disabilities and qualifying older adults, there is widespread dissatisfaction with transportation services for the aging adult population.

There may be an absence of any service in some rural areas, but ADA services in urban areas are often criticized, by older adults and their advocates, as inadequate. Hundreds of non-profits and faith-based organizations, throughout the United States, have been inspired to try to fill this perceived need with what are sometimes very innovative and cost effective programs. Still hundreds more, at this very moment, are planning to introduce some form of supplemental transportation service that better meets the measured and reported demand of older adults for “friendlier and more user-friendly” transportation. Perhaps the biggest problem facing both existing programs and new start-ups, however, is funding.

The Transportation Reimbursement and Information Project (TRIP), in Riverside County, California, is one such program that serves the special, and otherwise unmet, needs of older adults and persons with disabilities. The funding requirement for this program has been met through the use of county sales tax revenues as approved by voters in 1988. As a result, TRIP has been operating for over nine years now with a level and constant funding base.

Location. Riverside County is an inland county in Southern California, bordered on the north by San Bernardino County, on the south by San Diego and Imperial counties, on the east by the Colorado River and, just 14 miles from the Pacific Ocean, on the west by Orange County. Riverside County is



the fourth largest county in California, stretching nearly 200 miles across and comprising over 7,200 square miles of fertile river valleys, low deserts, mountains, foothills and rolling plains. While the County's history is linked to the agriculture industry, in recent years commerce, construction, manufacturing and tourism have resulted in dramatic population growth. The 2000 Census estimates the population to be 1,511,034, of which 12.7% (or over 191,460) are age 65 or older. Persons with disabilities, who are non-institutionalized, are estimated to be 12.9% of the population, or 194,269. Of persons with disabilities, 36.9%, or 71,619 people, are aged 65 or older.

Transit Services. The transportation options in Riverside County include: the Riverside Transit Agency in West Riverside County (fixed route and Dial-A-Ride), SunLine Transit Agency in the Coachella Valley (SunBus, SunDial, and SunLink to the West County), and Southern California's MetroLink rail system. The passage of a ballot measure in 1988, authorizing an increase in the sales tax rate to help pay for transportation projects, has also resulted in the funding of supplemental transit programs. These supplemental programs serve many persons with special needs who say they cannot use the county's fixed route system or even the Dial-A-Ride type programs for two reasons: (1) they are difficult to access, and (2) they do not provide escorts.

Public Transportation Funding in California. In the mid 1960's, transportation was the second largest line item in the state budget. Only K-12 education received more funding than transportation. In fact, most of Southern California's freeway system was built in the 1960's and early 1970's. By the 1980's, however, state priorities had changed and the counties were forced to find ways to supplement state subsidies to support transportation services.

In the late 1970's and early 1980's many California counties were seeking increases in sale's taxes to help pay for transportation needs. Like many other counties, Riverside County joined in and placed an initiative before voters in 1988 to add a half-cent sales tax assessment for the funding of transportation.

The California Initiative Process and Riverside County's "Measure A". There are two ways in which measures may be placed on the ballot in California: (1) through a petition process, involving the gathering of voter signatures, and (2) a measure may also be placed on the ballot by elected officials. Measure A was placed on the ballot in 1988 through action of the Riverside County Board of Supervisors. It was designated "Measure A" because it just happened that it was the first measure to be placed on the ballot.

Though following the lead of other counties, Riverside County's approach differed significantly from others in that their ballot measure contained a promise to address a wide variety of publicly perceived transportation needs, *including the transportation needs of the elderly and persons with disabilities.*

According to John Standiford, Public Information Officer for the Riverside Transportation Commission, "From the beginning and even until today, Measure A was to be about *transportation*, and that's every form of transportation. Unlike many other counties, Measure A is *not a highway measure or*, as is the case in some other counties, a *transit measure. It's intended to pay for transportation of all kinds.*" Measure A was constructed to address a variety of publicly perceived needs, from specific highway improvements and projects, throughout the entire county, to specific individual needs for special services.

Standiford says, "The reason for seeking the Measure was twofold: (1) to increase the amount of investment in transportation projects and services, and (2) to increase the level of local control in planning transportation projects." He continues, "The idea was to develop a comprehensive

transportation program that incorporated funding for freeways, streets and roads, public transit, commuter rail service, and provide funds to meet the special transportation needs of seniors and persons with disabilities. *After all, every taxpayer in the county would contribute to the program with every purchase, so why not make sure that every form of transportation would receive funding?"*

Campaign materials and the ballot language argument presented a detailed expenditure plan showing where the revenue from the half-cent sales tax would be spent over a 20-year period, and included a promise that funding would be provided for specialized transit services and for bus service for senior citizens, persons with disabilities and the truly needy as a result of the measure's passage.

In 1988, 78.9 percent of the voters approved Measure A – a resounding yes for meaningful improvements in the county's transportation infrastructure, systems and programs.

The full text of Riverside County's 1988 Measure A ordinance and plan is available on the Internet at <http://www.rctc.org/measureA/pdf/1988MeasureA.pdf>. As a result of the great successes of the 1988 measure, Riverside County decided to place a "Measure A" initiative renewal before voters in November 2002. The full text of this measure is also available on the Internet at <http://www.rctc.org/measureA/pdf/2002MeasureA.pdf>.

The renewal of Measure A was approved by 69.0 percent of the voters on November 5, 2002. The approval of the new measure guarantees continuing funding support of transportation programs, including special transportation programs for seniors and persons with disabilities. The original Measure A expires in 2008. The renewed Measure A will begin in 2009 and continue through 2039.

The Impact of Voter Approved Sales Tax Funding of a Comprehensive Transportation Plan.

Fourteen years after voter approval of the first 20-year plan, most of the \$1.5 billion in promised projects and services are in place or about to begin construction. In fact, *more than 60 percent of all transportation funding in Riverside County is generated by Measure A* and this far surpasses the dollars the area receives from either the state or federal governments, even though the total amount of funding from state and federal governments continues to grow.

By 2009, Measure A funding in Riverside County will have benefited everyone from the commuter, to local residents, to business users of county streets and highways:

- 6.3%, or \$95,634,000 for TRANSIT
- 31.9%, or \$488,017,000 for HIGHWAYS
- 39.5%, or \$605,553,000 for LOCAL STREETS
- 10.6%, or \$162,195,000 for REGIONAL ARTERIALS
- 11.7%, or \$178,742,000 for RAIL

Another central idea of Measure A, that was explicitly framed in its language, was that passage of the tax would result in a value-added situation and not be a tax that merely replaced additional sources of funding. For example, in order to receive street and road funding, cities would be required to maintain the level of street spending that they did prior to Measure A. Standiford says, "That's because we didn't want Measure A to replace what was already being spent. Instead it was intended to add to the total amount." And, in fact, *local investment in transportation has increased since the passage of Measure A.*

From the beginning, there was a desire to fund programs that might go above and beyond the usual public transit services that had been available. In doing so, there was a hope that the availability of funding would result in innovative and cost effective programs to address the specific needs of population segments that were previously unserved or underserved. Standiford says, “As a result, Riverside County can point to a wider array of services than many other places and we can also serve a very diverse population and wide geographic area unique to the county.”

\$31 million of the Measure A plan was specifically designated to help provide commuter buses, car and vanpools, as well as discounted fares and “more transit service for seniors and handicapped”. By Riverside County Transportation Commission policy, revenues for special transportation programs were then to be split evenly between ride-sharing and specialized transit programs.

Nearly twenty innovative programs, for seniors and persons with disabilities, including the Transportation Reimbursement and Information Project (better known as “TRIP”), have been funded so far by the half-cent Measure A sales tax initiative. From July 2001 through June 2002, nine service projects received \$955,000 of Measure A funding. TRIP received \$240,000. Since 1993, TRIP has received almost \$2 million of Measure A support to provide its unique blend of escorted transportation for the county’s transportation needy residents.

Special services for seniors and persons with disabilities, that receive funding through Measure A, compete for the available funds through a grant application process. In 2001, six other Measure A services, besides TRIP, provided 36,730 one-way trips and 400,216 miles of travel for transportation deprived residents in the Western part of Riverside County. In addition, another Measure A service provided mobility and access training for persons with sight impairments and another Measure A service gave away 13,539 ride tickets for public transportation to persons with extreme financial need.

The TRIP Program. The non-profit TRIP program helps aging persons and those with disabilities get to their doctor, the store, or other places to meet both essential and quality of life needs. The program was an outgrowth of a normal community planning effort. In the 1980s, a consumer needs assessment meeting in the far eastern part of the County identified a special transportation need when a participant made the comment that, “Of course we provide rides to our neighbors and friends, but we can’t afford the gas.” That one comment resulted in the idea of creating an alternative transportation program for seniors that reimbursed volunteer drivers for gas. When the idea was presented in public hearings in other parts of the County, it received consistent support from participants.

The new transportation program, “TRIP”, was developed from stated consumer needs and funded by Riverside County’s visionary Measure A sales tax initiative. It began operation in 1993 and has now been successfully meeting the special escort and assisted transportation needs of older adults and persons with disabilities for nine years.

In the most recent fiscal year, ending June 30, 2002, the TRIP program provided 32,667 escorted, one-way trips and 798,375 miles of travel for 291 persons across Riverside County. A 40% match of Measure A funds for the program was secured through grants and service contracts from the Riverside County Office on Aging, the City of Blythe, SunLine Transit Agency, and the Senior Low Vision Program of the California Department of Rehabilitation.

Lessons Learned. It is unreasonable to expect standardized transit systems to meet the full range of a population’s transportation requirements. Many older adults and persons with disabilities require a level of individualized service that they say cannot reasonably be provided by systems that are designed to meet the needs of the general population.

Funding strategies can be designed to support even small niche services when they are formulated with the intent of providing these services as part of a larger, comprehensive plan to meet the full range of a community's transportation requirements. Effective packaging of such a comprehensive plan can result in resounding voter support and approval, even if it means an increase in taxes. Centralized funding of a comprehensive transportation plan can also result in less duplication of services than might arise from many independently administered and funded services, as well as more coordination of the services provided.

Funding from a variety of alternative sources is more likely to be attracted to an established program that is already operating successfully.

Located in Pasadena, CA, the Beverly Foundation is a 501(c)(3) nonprofit organization whose purpose is to promote quality of life of America's older population through research, demonstration and education that addresses long term care and transportation mobility.

The AAA Foundation for Traffic Safety is a 501(c)(3) public charity located in Washington, DC that is dedicated to research and education about the causes of traffic crashes. It is funded by donations from AAA Clubs, AAA members, and other organizations associated with the American Automobile Association.

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**The STPs Mobilizer Project is a
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