

OC250416

13 June 2025

[REDACTED]

Tēnā koe [REDACTED]

I refer to your email dated 8 May 2025 requesting the following under the Official Information Act 1982 (the Act):

*"I request information, policy documents and aide memoire used in the development of the Review of the Total Mobility Scheme, in the time period August 2024 to present day And I request information relating to scheduling of the release of the Review of the Total Mobility Scheme".*

21 documents fall within the scope of your request and are enclosed. The documents are listed in the document schedule attached as Annex 1 and outlines how the documents you requested have been treated under the Act.

Certain information is withheld under the following sections of the Act:

- 9(2)(a) to protect the privacy of natural persons
- 9(2)(ba)(ii) protect information which is subject to an obligation of confidence or which any person has been or could be compelled to provide under the authority of any enactment, where the making available of the information would be likely otherwise to damage the public interest
- 9(2)(f)(iv) to maintain the constitutional conventions for the time being which protect the confidentiality of advice tendered by Ministers of the Crown and officials
- 9(2)(g)(i) to maintain the effective conduct of public affairs through the free and frank expression of opinions by or between or to Ministers of the Crown or members of an organisation or officers and employees of any public service agency or organisation in the course of their duty
- 18(d) the information requested is or will soon be publicly available

With regard to the information that has been withheld under section 9 of the Act, I am satisfied that the reasons for withholding the information at this time are not outweighed by public interest considerations that would make it desirable to make the information available.

You have the right to seek an investigation and review of this response by the Ombudsman, in accordance with section 28(3) of the Act. The relevant details can be found on the Ombudsman's website [www.ombudsman.parliament.nz](http://www.ombudsman.parliament.nz)

The Ministry publishes our Official Information Act responses and the information contained in our reply to you may be published on the Ministry's website. Before publishing we will remove any personal or identifiable information.

Nāku noa, nā

A handwritten signature in black ink that reads "M Willberg". The signature is written in a cursive, flowing style.

Marian Willberg  
**Manager, Maritime, Freight, and Access**

## Annex 1: Documents in scope of request

Doc #	Reference number	Date	Title of Document	Decision on request
1	n/a	August 2024	<i>Terms of Reference Document</i> Total Mobility Scheme review Terms of Reference August 2024	Refused under 18(d) as it is already publicly available. The report can be found here: <a href="https://www.transport.govt.nz/assets/Uploads/Total-Mobility-Scheme-review-Terms-of-Reference-updated-Final-August-2024.pdf">https://www.transport.govt.nz/assets/Uploads/Total-Mobility-Scheme-review Terms-of-Reference updated Final-August-2024.pdf</a>
2	OC241020	9 October 2024	<i>Briefing</i> Overview of Total Mobility Discussion Document	Withheld some information under 9(2)(a), 9(2)(ba)(ii), 9(2)(f)(iv).
3	OC241218	30 October 2024	<i>Briefing</i> Total Mobility - Approval to undertake public consultation	Withheld in full under 9(2)(f)(iv).
4	OC250090	19 February 2025	<i>Briefing</i> Public transport concessions and Total Mobility	Withheld some information under 9(2)(a), 9(2)(ba)(ii), 9(2)(f)(iv), or 9(2)(g)(i).
5	OC240764	January 2025	<i>Cabinet Paper (draft)</i> Total Mobility - Approval to undertake public consultation	Withheld in full under 9(2)(f)(iv).
6	OC250294	16 April 2025	<i>Briefing</i> Funding sustainability for the Community Connect programme [Redacted]	Withheld some information under 9(2)(a), 9(2)(ba)(ii), 9(2)(f)(iv), 9(2)(g)(i), or it is out of scope.
7	n/a	12 November 2024	<i>Email</i>	Withheld some information under 9(2)(a).

Doc #	Reference number	Date	Title of Document	Decision on request
			Auckland Transport, Demographics of Total Mobility Users	
8	n/a	30 August 2024	<i>Email</i> Bay of Plenty Regional Council, Demographics of Total Mobility Users	Withheld some information under 9(2)(a).
9	n/a	20 August 2024	<i>Email</i> Invercargill City Council, Demographics of Total Mobility Users	Withheld some information under 9(2)(a).
10	n/a	25 October 2024	<i>Email</i> Environment Canterbury, Demographics of Total Mobility Users	Withheld some information under 9(2)(a).
11	n/a	29 October 2024	<i>Email with attachments</i> Greater Wellington Regional Council, Demographics of Total Mobility Users	Withheld some information under 9(2)(a).
12	n/a	4 April 2025	<i>Email</i> FW_ OC250294 Community Connect_ Total Mobility and SuperGold concessions - funding sustainability - Briefing - Policy.msg	Withheld some information under 9(2)(a), 9(2)(ba)(ii), or 9(2)(f)(iv).
13	n/a	8 April 2024	<i>Email with attachment</i> Total Mobility client assessment form.msg	Withheld some information under 9(2)(a), as it relates to the privacy of natural persons.
14	n/a	20 September 2024	<i>Email with attachment</i> Total Mobility historic report.msg	Withheld some information under 9(2)(a).

Doc #	Reference number	Date	Title of Document	Decision on request
15	n/a	25 October 2024	<i>Email</i> Number of Total Mobility Hoist trips taken.msg	Withheld some information 9(2)(a).
16	n/a	2 August 2024	<i>Email</i> RE_ Total Mobility - funding questions .msg	Withheld some information under 9(2)(a).
17	n/a	15 August 2024	<i>Email</i> RE_ Total Mobility Data .msg	Withheld some information 9(2)(a).
18	n/a	3 September 2024	<i>Email</i> RE_ Total Mobility Data_ Analysis - cost and usage trends 2019-2024 .msg	Withheld some information under 9(2)(a). The report attached to the email can be found here: <a href="https://www.nzta.govt.nz/assets/resources/total-mobility-data-analysis-report/total-mobility-data-analysis-report.pdf">https://www.nzta.govt.nz/assets/resources/total-mobility-data-analysis-report/total-mobility-data-analysis-report.pdf</a>
19	n/a	12 September 2024	<i>Email</i> RE_ Total Mobility users - demographic profile.msg	Withheld some information 9(2)(a).
20	n/a	9 August 2024	<i>Email</i> Total Mobility summary 2021 - 24.msg	Withheld some information 9(2)(a).
21	n/a	15 April 2025	<i>Document</i> 2504 Response to MoT questions on demand and costs	Withheld some information under 9(2)(f)(iv).



9 October 2024

OC241020

Hon Simeon Brown

Action required by:

Minister of Transport

Monday, 14 October 2024

## TOTAL MOBILITY SCHEME REVIEW: OVERVIEW OF POLICY DIRECTION

### Purpose

To seek your agreement on matters to consult on to improve the policy settings for the Total Mobility scheme.

### Key points

s 9(2)(f)(iv)



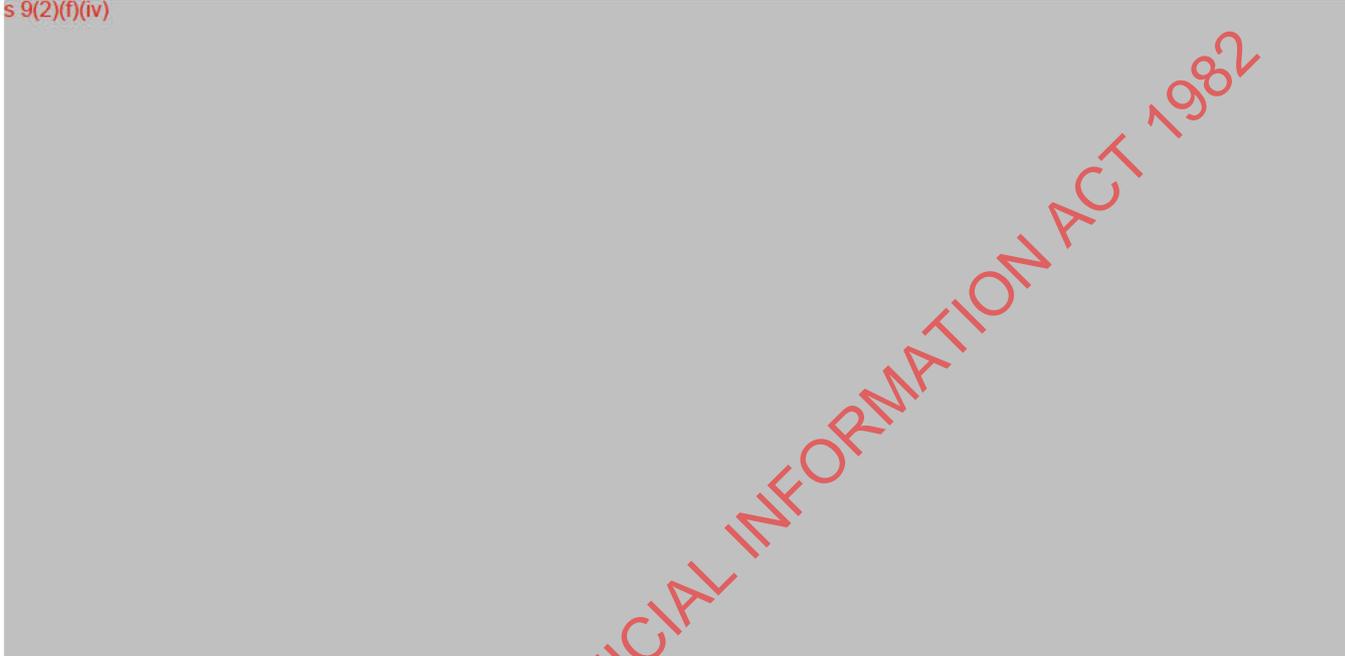
- There are major regional variations in what people are entitled to. For example, there are major variations in maximum fare caps. s 9(2)(f)(iv)

s 9(2)(f)(iv)

**Recommendations**

We recommend you:

s 9(2)(f)(iv)



3 agree to share this paper with Hon Louise Upston, Disability Issues Minister Yes / No

Ruth Fairhall  
Deputy Chief Executive Policy Group  
9 / 10 / 2024

Hon Simeon Brown  
Minister of Transport  
..... / ..... / 2024

- Minister's office to complete:
- Approved
  - Declined
  - Seen by Minister
  - Not seen by Minister
  - Overtaken by events

**Comments**

**Contacts**

Name	Telephone	First contact
Ruth Fairhall, Deputy Chief Executive	s 9(2)(a)	
Jessica Ranger, Manager Urban Development & Public Transport		✓

## TOTAL MOBILITY SCHEME REVIEW: OVERVIEW OF POLICY DIRECTION

### Background

- 1 As you are aware, the Ministry is reviewing the Total Mobility scheme (**Total Mobility**) (OC240432 and OC240554 refer). The purpose of the review is to consider how Total Mobility currently operates and how it could be improved to enable better outcomes for disabled people.
- 2 On 7 June 2024, we briefed you on the key policy issues that need to be addressed in this review. These included clarifying the purpose, eligibility, regional inequities, supply of services, and value for money. We have identified potential options to change the Total Mobility policy settings to include in the discussion document for public feedback.
- 3 Concurrently, NZTA is developing a programme of work with Public Transport Authorities (**PTAs**) to improve Total Mobility administration and governance issues. This two-pronged approach will ensure the review adequately covers the Terms of Reference (Annex 1).

### Total Mobility is under financial pressure

- 4 The cost of Total Mobility to the National Land Transport Plan (**NLTP**) is projected to increase by \$52 million over the 2024-2027 period, an increase of 72 percent over the last National Land Transport Fund (**NLTF**) period.
- 5 Increasing costs are due to a combination of factors:
  - 5.1 The number of users has increased 40 percent over the last five years, with approximately 107,000 registered users at present. The main driver is an aging population and a corresponding increase in the number of older New Zealanders experiencing age-related impairments. For example, almost three-quarters of all Total Mobility users in Auckland are over 65 years
  - 5.2 The subsidy increase from 50 percent to 75 percent for Total Mobility fares has resulted in growing patronage and changes in service usage (e.g. increases in medium-distance trips)
  - 5.3 An increase in the fares charged by taxi services due to inflation.
- 6 The budgeted Crown allocation for Total Mobility is \$12 million. Based on demand the Crown component of Total Mobility funding is much higher (\$20.5 million in 2024/25 increasing in subsequent years). The multi-category appropriation Total Mobility is part of can accommodate these costs this financial year. s 9(2)(f)(iv)

7 [REDACTED]

8 The Terms of Reference for the review includes a commitment to focus on current and projected funding needs, and how these funding needs could be met to enable the longevity of this scheme, which we would like to expose though the discussion document.

s 9(2)(f)(iv) [REDACTED] **five key principles that will guide decisions on the policy settings for Total Mobility going forward**

9 Based on what have heard from users, providers, and PTAs so far, as well as our own analysis about what a good scheme looks like, we have identified five key principles Total Mobility needs to have to enable it to deliver on its purpose:

- 9.1 **Accessible** – it should be targeted at disabled people who are prevented from using public transport, and easy for them to use where it is available.
- 9.2 **Affordable** – it should be affordable for users, as well as local and central government (e.g. delivered within the current fiscal envelope).
- 9.3 **Equitable** – there should be similar approaches for delivering and using the scheme across the country, while recognising the need for some local variations.
- 9.4 **Efficient** – administration should be efficient, and it should deliver value for money by ensuring that it is well-targeted and well-delivered.
- 9.5 **Agile** – the scheme needs to be capable of adapting, anticipating social changes, and supporting innovation in how it is delivered.

10 [REDACTED] There are potential tensions between these principles, for example how to manage trade offs between increasing accessibility and affordability.

s 9(2)(f)(iv) [REDACTED] **purpose of Total Mobility to confirm it is still relevant**

11 A clear and purpose statement is required to provide a guiderail for decisions about who Total Mobility is for (eligibility), what it delivers (entitlements) and how it is delivered and funded.

12 The purpose has never been agreed by Cabinet as Total Mobility began as a community initiative that sat outside of central government.<sup>1</sup> The purpose was clarified and agreed through a Ministry review in 2005.

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<sup>1</sup> Total Mobility was established in the 1980's and supported by funds raised in a Telethon in the Year of the Disabled. It was originally a "Number 8 Wire" solution to the transport problems being experienced by the disabled community. Initially managed by the Disabled Person Assembly, the Scheme was eventually accepted as a regional council transport responsibility.

- 13 NZTA issued policy guidelines in 2008, including defining the recommended purpose in their guidance to PTAs in this way:

*“to assist eligible people with a long-term impairment who are unable to access appropriate transport to meet their daily needs and enhance their community participation”.*

s 9(2)(f)(iv)

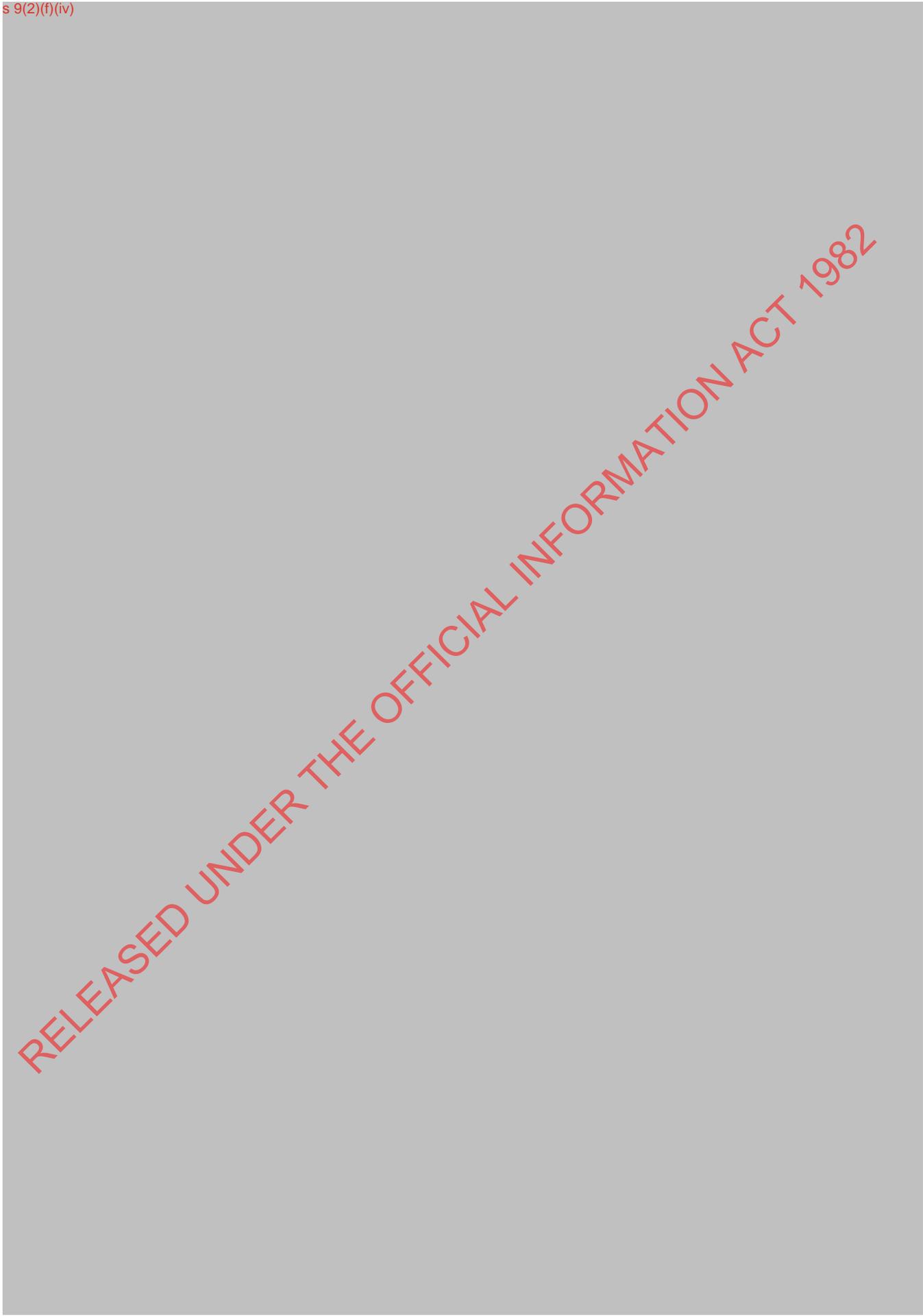
#### **Who can access Total Mobility needs to align with the purpose of the scheme**

s 9(2)(f)(iv)

- 17 Originally, Total Mobility was established to support people with disabilities with high levels of unmet transport need (e.g. people in wheelchairs who could not access a bus or regular taxi services). Over time, the scope of the scheme has expanded to include a wider cohort of people than was originally envisaged. We know from anecdotal evidence that Total Mobility is being used by people who regularly use public transport and who likely sit on the lower end of a spectrum of unmet transport needs.
- 18 The growth in scope is primarily a result of broad and subjective eligibility settings, compounded by the absence of a national approach to assessment criteria (NZTA have guidance on eligibility criteria, but PTAs also develop their own), variable assessor capability, and limited oversight of assessment decisions.

s 9(2)(f)(iv)

s 9(2)(f)(iv)



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s 9(2)(f)(iv)

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27 While the scheme is highly appreciated by users, a common criticism is the availability of services when they are needed, especially at peak times. s 9(2)(f)(iv)

27.1 s 9(2)(f)(iv) There are significant service issues for people in wheelchairs who require the use of

modified vehicles with wheelchair hoists. PTAs have noted operators are seeking an increase to the current incentive payment of \$10, which has remained unchanged since at least 2005. There are also major regional variations in the subsidy levels provided to operators to install wheelchair hoists in vehicles. <sup>s 9(2)(f)(iv)</sup>

27.2

<sup>s 9(2)(f)(iv)</sup>

Currently operators in the scheme are mostly private taxi companies. The eligibility requirements for operators are set by NZTA guidance and do not specifically exclude other providers. <sup>s 9(2)(f)(iv)</sup>

<sup>s 9(2)(f)(iv)</sup>

- 28 Major regional variations in funding levels and services across the country means Total Mobility is not as accessible, equitable or effective as it could be.
- 29 We consider stronger central government oversight for funding decisions would help address this issue. However, finding the right balance is important due to regional variations for the supply and demand of Total Mobility services, and PTAs' desire for the scheme to be affordable.
- 30 The setting of maximum fare caps is the main lever to control costs for Total Mobility, other than subsidy levels, and these fare caps are set by PTAs. <sup>s 9(2)(ba)(ii)</sup>

31

<sup>s 9(2)(f)(iv)</sup>

32

s 9(2)(f)(iv)

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## **ANNEX 1 TERMS OF REFERENCE FOR THE TOTAL MOBILITY REVIEW**

This document replaces the initial Terms of Reference for the Total Mobility Review that were set in July 2023. The review will build on the work that commenced under the previous Terms of Reference. These Terms have been revised to give the review a clearer focus so that it can deliver on its original purpose.

### **Purpose**

- 1 The purpose of reviewing the Total Mobility Scheme (Total Mobility) is to investigate how this scheme operates and how it can be improved to create better outcomes for disabled people.
- 2 The review will support the human rights of disabled people, as outlined in New Zealand's commitments under the United Nations Convention on the Rights of Persons with Disabilities.
- 3 The review aims to recommend improvements and changes that could be made to the scheme in the short-term (i.e. within the next few years). It will also identify longer-term changes and initiatives that may be needed in the future.

### **Scope**

- 4 The review is covering four key areas:
  1. The purpose of Total Mobility
  2. How Total Mobility could be made more accessible for disabled people
  3. How aspects of Total Mobility's operations could be improved
  4. Sustainable funding mechanisms for Total Mobility

### **Area 1: The purpose of Total Mobility**

The review is focusing on:

- 5 What the purpose of Total Mobility is and how it fits with other government initiatives to support transport accessibility for disabled people.
- 6 How Total Mobility aligns with the human rights of disabled people under the United Nations Convention on the Rights of Persons with Disabilities.
- 7 How Total Mobility and the transport needs of disabled people have changed over time, and how these could keep evolving in the future.

### **Area 2: How Total Mobility could be made more accessible for disabled people**

The review is focusing on:

- 8 Eligibility criteria for Total Mobility users and whether these criteria are fit-for-purpose.

- 9 Assessment processes for people applying for Total Mobility and whether these processes are fit-for-purpose.
- 10 Whether the eligibility criteria and assessment processes are benefiting those who need Total Mobility the most.
- 11 Costs faced by Total Mobility users, including costs such as assessment fees.
- 12 The ability of people to use Total Mobility services in different regions, and how this may impact on disabled people travelling to different regions that deliver the scheme.

### **Area 3: How aspects of Total Mobility's operations could be improved**

The review is focusing on:

- 13 Whether any changes are needed to make the scheme's delivery more consistent and equitable across regions that deliver the scheme, and opportunities to innovate.
- 14 The supply of Total Mobility services, including the availability of specialist wheelchair accessible vehicles and drivers, and options to increase service supply if needed.
- 15 Who should be eligible to operate as a Total Mobility provider.
- 16 Opportunities to deliver more innovative services to Total Mobility users.
- 17 How Total Mobility providers are financially compensated in the scheme and whether the scheme needs to be more attractive for providers to encourage them to provide services.
- 18 Whether operators are fairly compensated for installing and maintaining equipment such as wheelchair hoists.

### **Area 4: Funding mechanisms for Total Mobility:**

The review is focusing on:

- 19 Current and projected funding needs for Total Mobility, and how these funding needs could be met to enable the longevity of this scheme.
- 20 How other government initiatives to support transport accessibility for disabled people are funded, and the interactions between these funding sources.
- 21 The potential for new or innovative funding mechanisms.

### **Approach for the review**

- 22 The Ministry of Transport is leading the review. It is being informed by research and engagement with stakeholders.

- 23 The Ministry will engage with other government agencies, organisations that represent the interests of disabled people, individuals in the disabled community, public transport authorities, and existing or potential Total Mobility operators during the review.
- 24 The review is intended to be completed by March 2025.

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19 February 2025

OC250090

**Hon Chris Bishop**  
**Minister of Transport**

**Action required by:**  
Friday, 7 March 2025

## PUBLIC TRANSPORT CONCESSIONS AND TOTAL MOBILITY

### Purpose

To advise you of anticipated funding shortfalls for Crown funded public transport concessions, and to seek your direction on the review of Total Mobility, s 9(2)(g)(i)

### Key points

- There are three Crown funded public transport concessions. SuperGold provides free off-peak public transport to over-65s and veterans, Community Connect provides half price public transport to those on a benefit or very low incomes, and Total Mobility provides subsidised taxi services to disabled people who cannot use other forms of transport.

- s 9(2)(ba)(ii)

- s 9(2)(f)(iv)

- Total Mobility is currently undergoing a broad review, which is considering its long-term sustainability under current funding and policy settings. s 9(2)(f)(iv)

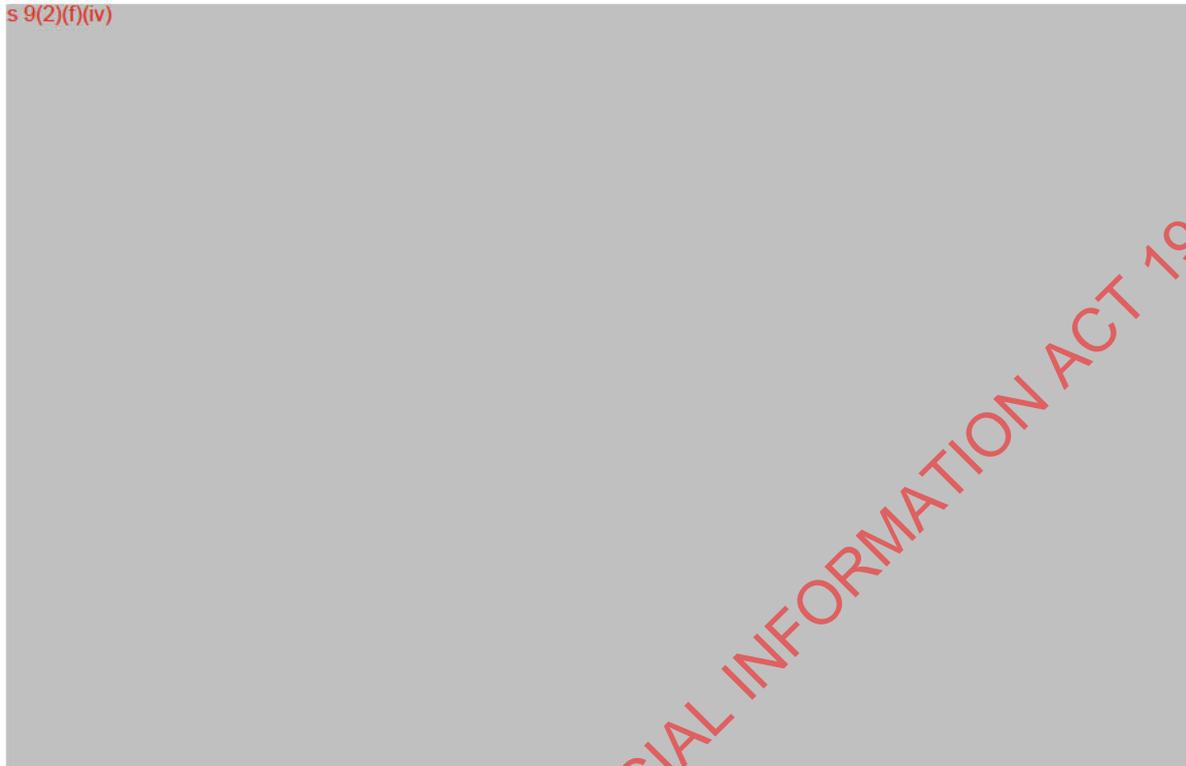
- s 9(2)(f)(iv) s 9(2)(g)(i)

We are seeking your direction on how you wish to progress the review, and have three options for you to consider. We have shared this briefing with Whaikaha Ministry of Disabled People, and it is broadly comfortable with our proposed approach.

**Recommendations**

We recommend you:

s 9(2)(f)(iv)



Yes / No

Yes / No

Yes / No

3 refer this briefing to the Minister for Disability Issues and confirm a joint preferred approach.

Yes / No

Ruth Fairhall  
Deputy Chief Executive – Policy Group  
19/ 02 /2025

Hon Chris Bishop  
Minister of Transport  
..... / ..... / .....

Minister's office to complete:

Approved

Declined

Seen by Minister

Not seen by Minister

Overtaken by events

**Comments**

**Contacts**

Name	Telephone	First contact
Ruth Fairhall, Deputy Chief Executive – Policy Group	s 9(2)(a)	
Genevieve Woodall, Manager – Urban Development and Public Transport	s 9(2)(a)	✓

## PUBLIC TRANSPORT CONCESSIONS AND TOTAL MOBILITY

1 There are three Crown funded public transport concessions.<sup>1</sup> A summary of each concession is provided as **Annex 1**.

**All three Crown-funded concessions are facing cost pressures in the medium-term, but decisions will be needed this year** s 9(2)(f)(iv)

2 s 9(2)(ba)(ii)  
Out of scope

3 While all three concessions receive some Crown funding, the level of risk to the Crown differs between the concessions.

4 With regard to Community Connect and Total Mobility, there is a direct financial risk to the Crown, as Public Transport Authorities (PTAs) are reimbursed for the agreed Crown share based on actual use. Additional demand may lead to a Crown contribution beyond what has been appropriated.

5 In comparison, since 2016/17, PTAs and eligible commercial public transport operators are bulk funded for SuperGold concessions at the beginning of each financial year based on forecast demand. This means that PTAs and commercial operators are required to meet the costs of higher-than-expected demand. However, PTAs and commercial operators can choose to opt out of the SuperGold scheme at the start of a financial year if demand consistently exceeds funding.

6 s 9(2)(g)(i)

7 s 9(2)(f)(iv)

<sup>1</sup> Other concessions in New Zealand are funded by PTAs, either entirely (e.g. off-peak and child discounts), or through agreements with other entities (e.g. with education providers for tertiary concessions in some regions).

## Total Mobility is a unique, accessible transport scheme in New Zealand

- 8 Total Mobility is a government-subsidised transport scheme which has existed for over 40 years, and helps people get where they need to go when using public or private transport is not possible because the transport system is not set up to accommodate their disabilities. In 2023/24, 107,000 registered and eligible users accessed subsidised taxis, and in some cases other forms of suitable transport. The current forecast is for 3.1 million boardings in 2024/25, compared to 1.8 million in both 2018/19 and 2019/20, an increase of over 70 percent.
- 9 Users have reported they value Total Mobility as it enables them to participate in the community, creates a sense of well-being, and increases access to employment and education. It helps address the high rates of social isolation experienced by many disabled people.<sup>2</sup>
- 10 Total Mobility is funded through a combination of the National Land Transport Fund (NLTF), Crown funding, and local government contributions, as outlined in Figure 1. A regional cap is set by each PTA/local authority for their region, and the Total Mobility user pays for any fare over and above the regional cap.

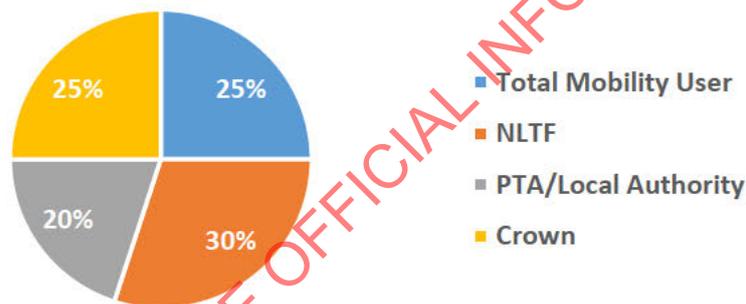


Figure 1 - Contributions toward each Total Mobility trip (up to the regional cap)

### A Review of Total Mobility is underway, but began under a different context meaning the focus has shifted over time

- 11 The previous Government directed the Ministry to review Total Mobility (the Review), and work began in 2023. The Review has strong interest from users of Total Mobility and the wider disability community. In the context of the initial commissioning, the previous Government had provided additional Crown funding for Total Mobility through and following the COVID-19 period, and was seeking functional improvements through the Review.
- 12 Following the 2023 Election, Minister Brown agreed a rescoped Terms of Reference for the Review, which is attached as Annex 2. The Terms of Reference were rescoped in consultation with the Disabled Peoples Organisations Coalition, Whaikaha Ministry of Disabled People (Whaikaha), and the NZ Transport Agency. This sharpened the focus of the policy issues and reflected the priorities of the new Government.

<sup>2</sup> From the StatsNZ wellbeing questions in the Household Labour Force Survey (HLFS December 2020).

s 9(2)(f)(iv)



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17

The Review is considering Total Mobility's long-term sustainability under current funding and policy settings. s 9(2)(f)(iv)



s 9(2)(f)(iv)



s 9(2)(f)(iv)

- 19 There is a high level of interest and concern from the disability community about Government funding for disability services and support, and how sustainable funding is for Total Mobility into the future. This has increased over the course of the Review. Changes were made to flexible funding for disability support in March 2024, and engagement on this with the disability community is ongoing, with a consultation on Disability Support Services running until 24 March 2025.

s 9(2)(f)(iv)

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21

s 9(2)(f)(iv)

we recommend you refer this briefing to, and confirm a preferred approach with your colleague. Whaikaha has expressed that it is broadly comfortable with our recommended approach, but notes that any change to the expected public consultation may disappoint some in the disability sector.

s 9(2)(f)(iv)

- 22 We will continue to work with NZTA on advice regarding funding pressures across all concessions, s 9(2)(f)(iv)

## ANNEX 1: SUMMARY OF CROWN FUNDED PUBLIC TRANSPORT CONCESSIONS

	SuperGold	Community Connect	Total Mobility (Crown)
<b>Description</b>	<p>Free off-peak public transport for over-65s and veterans.</p> <p>Crown component pays approximately 50% of adult fare.</p> <p>Has existed since 2008, reviewed twice.</p>	<p>50% off public transport fares for Community Service Card holders. Holders are on a benefit, receiving the Accommodation Supplement, or lower income.</p> <p>Started in 2023. Settings changed in May 2024 (to remove half price fares for under-25s).</p>	<p>Subsidises taxi fares to 75% off up to a regional cap for disabled people who cannot use other transport. Crown component subsidises 25% of the fare.</p> <p>Total Mobility has existed since 1981, although the Crown funded component was only introduced in 2023. Prior to that, funded by just NLTF and PTAs/local authorities.</p> <p>Each PTA sets the regional fare cap (above which users pay 100% of the taxi fare) based on what is affordable for its local share.</p>
<b>Annual Crown Funding (FY24/25)</b>	\$38.9 million	\$12.0 million* *Originally \$24.3m, decreased within MCA with Total Mobility to cover current cost pressures in Total Mobility	\$24.3 million* *Originally \$12m, increased within MCA with Community Connect to cover current cost pressures in Total Mobility
<b>Other sources of funding</b>	PTAs and commercial operators co-fund/forgo approximately 50% of adult fare.	No other sources, other 50% of fare is still collected by the PTA as normal.	National Land Transport Fund covers 30% of fare, PTAs provide 20% of fare. User contributes 25% of fare up to the regional fare cap, then 100% of the fare above the cap. There are also funding pressures in the National Land Transport Fund and PTA shares.
<b>Crown funding inflation/CPI adjusted?</b>	Yes	No	No
<b>Demand driven?</b>	No, bulk funded with fixed pool allocated to each PTA and commercial operator annually.	Yes, although we could explore moving to a bulk funded model if use stabilises.	Yes, and moving away from a demand driven model would be difficult given the ultimate recipient is individual taxi drivers.

**ANNEX 2: RESCOPE** TERMS OF REFERENCE FOR TOTAL MOBILITY REVIEW

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16 April 2025

OC250294

Hon Chris Bishop

Action required by:

Minister of Transport

Friday, 2 May 2025

## FUNDING SUSTAINABILITY FOR THE COMMUNITY CONNECT PROGRAMME

Out of scope [Redacted]

### Purpose

Provide an overview of the cost pressures [Redacted]

[Redacted] which includes public transport concessions for [Redacted]

Total Mobility users, [Redacted] and options to mitigate these.

### Key points

Out of scope [Redacted]

s 9(2)(ba)(ii) [Redacted]

s 9(2)(f)(iv) [Redacted]

- There are existing operational levers available to PTAs to mitigate cost pressures for Total Mobility including lowering fare caps and using trip caps. Changes to policy and operational settings being considered by the Total Mobility Review could also contribute to mitigating cost pressures, s 9(2)(f)(iv) [Redacted]

[Redacted]

Out of scope

**Recommendations**

We recommend you:

s 9(2)(f)(iv)



Yes / No

Yes / No

Yes / No

3 refer this briefing to the office of the Minister for Disabilities.

Yes / No

Genevieve Woodall  
Manager, Urban Development and Public  
Transport  
16 / 04 / 2025  
..... / ..... / .....

Hon Chris Bishop  
Minister of Transport  
..... / ..... / .....

Minister's office to complete:

Approved

Declined

Seen by Minister

Not seen by Minister

Overtaken by events

Comments

**Contacts**

Name	Telephone	First contact
Genevieve Woodall, Manager, Urban Development and Public Transport	s 9(2)(a)	✓
s 9(2)(a) Senior Adviser, Urban Development and Public Transport	s 9(2)(a)	

## FUNDING SUSTAINABILITY FOR THE COMMUNITY CONNECT PROGRAMME

Out of scope

Out of scope

s 9(2)(ba)(ii)

- 3 On 31 March 2025, you asked for further advice on the cost pressures and funding shortfalls for the Total Mobility scheme Out of scope and options to mitigate these issues where possible.

s 9(2)(ba)(ii)

*Community Connect is a programme that includes public transport concessions for Community Service Card holders and Total Mobility users*

- 4 The Community Connect Programme provides public transport concessions to help with the cost of living. The two concessions and current funding allocations within the Vote Transport Public Transport Concessions Appropriation is as follows:
- 4.1 *Total Mobility Services Concessions*: an additional 25 percent discount for Total Mobility users (in addition to the existing 50 percent discount funded by the National Land Transport Fund (NLTF) and PTAs) (\$24.365 million).
  - 4.2 *Community Connect Programme Public Transport Concessions*: a 50 percent discount on public transport fares for Community Service Card (CSC) holders (\$12 million).

s 9(2)(ba)(ii)

s 9(2)(ba)(ii)

- 7 Total Mobility boardings have increased from around 1.6 million trips in 2021/22 to 2.7 million in 2024/25. This is expected to rise to over 4.7 million trips by 2030. The projected increase is partly attributable to the increased subsidy which has allowed people to afford more trips and has raised visibility of Total Mobility leading to more people registering to use it. This is likely the main driver of the cost pressures outlined in Table 1.

s 9(2)(ba)(ii)

- 8 The rising costs for Total Mobility are also putting pressure on the NLTF and local government share of funding, which are projected to increase significantly during the National Land Transport Programme 2024-27.

s 9(2)(ba)(ii)

- 10 NZTA manages funding demand on the NLTF by working with PTAs to manage within the approved funding during the National Land Transport Programme period. If the PTA

cannot manage funding within the approved programme budget, the PTA can request a cost increase from NZTA. An increase is not guaranteed as the request needs to be affordable and a priority for additional investment from the NLTF.

s 9(2)(f)(iv)

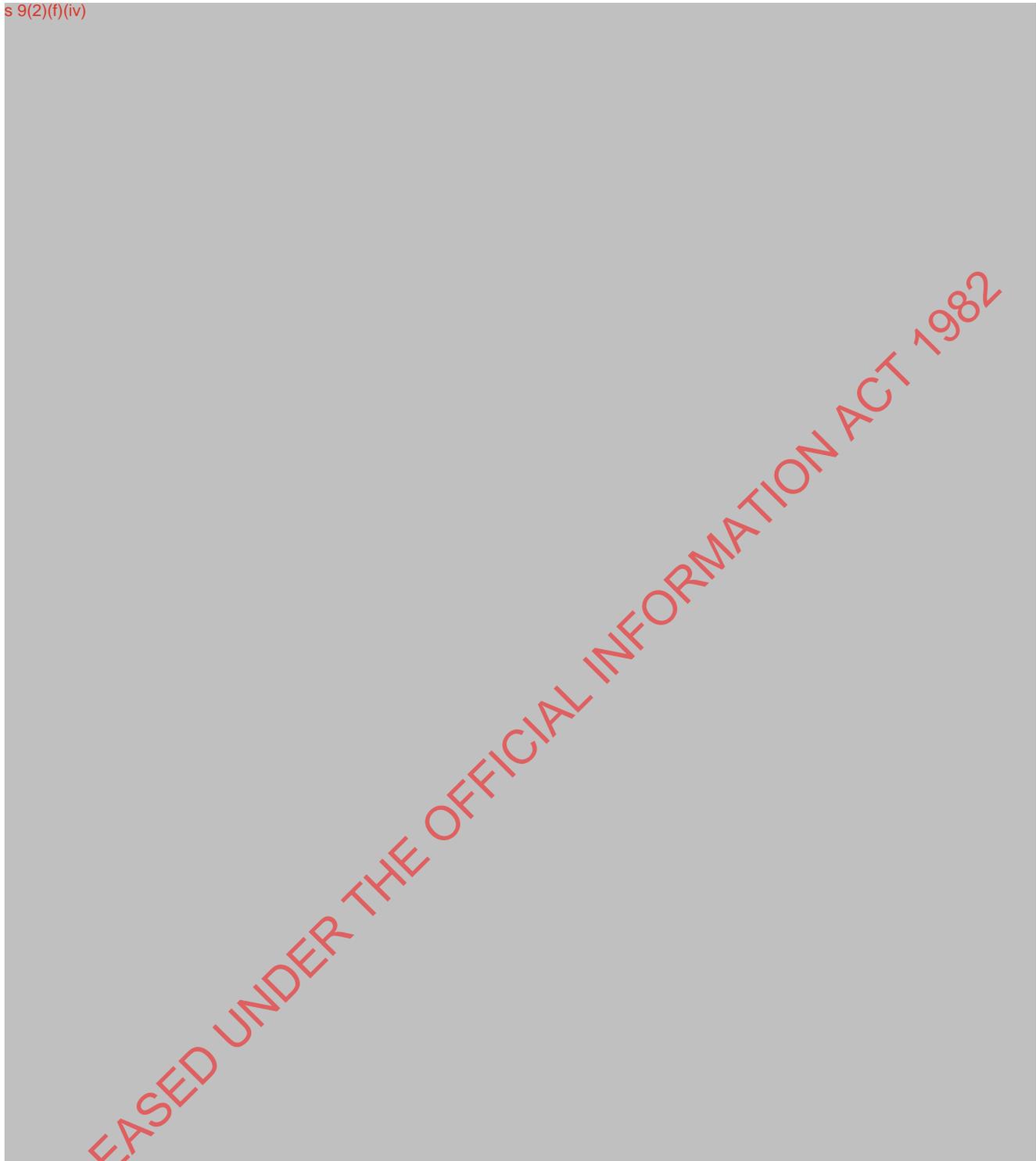
*There are a range of options to make Total Mobility more sustainable, some of which are being considered as part of the Total Mobility Review*

- 12 The Total Mobility Review aims to make Total Mobility fairer and more accessible for those who need it, while delivering cost effective services to make it sustainable in future years.

s 9(2)(f)(iv)

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s 9(2)(f)(iv)



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Out of scope



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**Next steps**

s 9(2)(g)(i)



s 9(2)(f)(iv)



s 9(2)(f)(iv)



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# Document 7

**From:** [Andy Roche \(AT\)](#)  
**To:** [Kathleen Wong](#); [Marleen Pankratz \(AT\)](#)  
**Cc:** [Whitney Adam](#)  
**Subject:** RE: Demographics of Total Mobility Users - Auckland Transport data  
**Date:** Tuesday, 12 November 2024 9:41:15 am  
**Attachments:** [image001.png](#)  
[image002.png](#)  
[image003.png](#)

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Hi Kathleen

Not sure if you still want this information. Sadly between Penelope leaving and me being overseas for the past month, this was something that Marleen didn't have the capacity to answer.

My best guess answers are set out below:

#### ARE YOU AWARE OF THE COMMON BARRIERS THOSE WITH DISABILITIES HAVE TO ACCESS TM?

The need for an assessment is cited as a barrier. We have fewer assessor agencies than in the past (until the review is complete we won't be appointing any more until we know just what changes are being made to the scheme). Barriers are:

- Geographic distribution of assessor agencies, given the size of the Auckland region.
  - We now require all assessor agencies to assess any potential client as a way of addressing this. This means that clients with a particular disability are no longer compelled to see an agency that understands their condition. This may potentially impact on the 'quality' of the assessment. We also don't have any assessors based on Waiheke Island – although still get clients resident their entering the scheme.
- Time delay to see an assessor.
- We have a list of individuals / entities that have enquired about becoming assessor agencies. Once we know where the review lands we can potentially run an ITQ for new assessor agencies.

#### WOULD YOU BE ABLE TO PROVIDE A BALLPARK FIGURE OF THE NUMBER OF PERMANENT, TEMPORARY AND FLUCTUATING DISABILITIES/IMPAIRMENTS?

Ridewise only reports out us as having 326 temporary clients. We don't know how many of them are 'active clients' as some of the assessments date back quite a few years. Ridewise also doesn't capture fluctuating need. It would be mainly people living with epilepsy and some low vision clients (can't cope with low light) who are fluctuating need. I doubt that we have more than 5% of clients in this category.

#### Is the number of wheelchair vehicles operating in your region available?

171 as of this morning.

My apologies for the delay in providing this information.

Regards

Andy

---

**From:** Kathleen Wong [s 9\(2\)\(a\)](#)  
**Sent:** Friday, October 25, 2024 10:04 AM  
**To:** Andy Roche (AT) [s 9\(2\)\(a\)](#); Marleen Pankratz (AT) [s 9\(2\)\(a\)](#)  
**Cc:** Whitney Adam [s 9\(2\)\(a\)](#)  
**Subject:** RE: Demographics of Total Mobility Users - Auckland Transport data

Apologies I attached the old version of the document. Please ignore and use this latest version.

Ngā mihi nui,

**Kathleen Wong** (she / her)

Kaitohutohu | Adviser – Urban Development and Public Transport

**Te Manatū Waka - Ministry of Transport**

s 9(2)(a)

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---

**From:** Kathleen Wong

**Sent:** Friday, October 25, 2024 9:00 AM

**To:** Andy Roche (AT) s 9(2)(a) Marleen Pankratz (AT) s 9(2)(a)

**Cc:** Whitney Adam s 9(2)(a)

**Subject:** RE: Demographics of Total Mobility Users - Auckland Transport data

Kia ora Andy and Marleen

Thank you again for providing the data below. I've collated the data Penelope provided and tried to come up with a 'user profile' of TM users in Auckland.

Could you and/or your team please have a look at the attachment and let you know if it's an accurate representation of TM users in Auckland? I understand data will be limited, but anything additional you're able to provide will great

If you had any feedback, can you please get this to me by **COP Tuesday 29 Oct?**

Ngā mihi nui,

**Kathleen Wong** (she / her)

Kaitohutohu | Adviser – Urban Development and Public Transport

**Te Manatū Waka - Ministry of Transport**

s 9(2)(a)

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**From:** Penelope Sanchez Portillo (AT) s 9(2)(a)

**Sent:** Monday, August 19, 2024 2:08 PM

**To:** Kathleen Wong s 9(2)(a)

**Cc:** Whitney Adam s 9(2)(a) Callum Gill s 9(2)(a) Andy Roche (AT) s 9(2)(a) Marleen Pankratz (AT) s 9(2)(a)

**Subject:** FW: Demographics of Total Mobility Users - Auckland Transport data

Hi Kathleen,

Response below in blue. Please let us know if you need anything else.

Attached the feedback provided to MrCagney – it gives a good overview and issues in the TM scheme.

Ngā mihi

**Penelope Sanchez | On-Demand & Mobility Manager**

**Metro Service Operations | Public Transport & AM**

Auckland Transport

20 Viaduct Harbour Avenue, Auckland 1010

s 9(2)(a)

| [www.at.govt.nz](http://www.at.govt.nz)

**From:** Kathleen Wong [s 9\(2\)\(a\)](#)  
**Sent:** Monday, August 19, 2024 10:25 AM  
**To:** [s 9\(2\)\(a\)](#) Penelope Sanchez Portillo (AT) [s 9\(2\)\(a\)](#)  
**Cc:** Whitney Adam [s 9\(2\)\(a\)](#) Callum Gill [s 9\(2\)\(a\)](#)  
**Subject:** Demographics of Total Mobility Users

Kia ora kōrua

I'm part of the team at the Ministry of Transport working on the Total Mobility Review. Whitney Adam (cc'd) has passed on your details to enquire about data your organisations might hold about Total Mobility (TM) users.

We currently don't have a clear profile of the typical TM user, so don't fully understand the extent of the Scheme's impact to those who do use it, or who struggle to access taxi services when needed. We're hoping you might be able to provide some information about the following:

- Ages of users, due to population aging the On Demand Mobility team expects the demand for TM services to increase substantially between 2023 and 2030. Currently approximately 73 percent of clients are over age 65. AT admits children to the TM scheme once they reach intermediate school age. Below this age we do not think that any children travel independently.
- Range of disability type(s), We have an extremely wide range of disabilities e.g. epilepsy, cerebral palsy, dementia, anxiety, low blind vision, hearing impaired, wheelchair users. Many clients live with multiple issues (particularly as they age). We have seen an increase in clients with anxiety issues since Covid.
- Typical duration of travel,

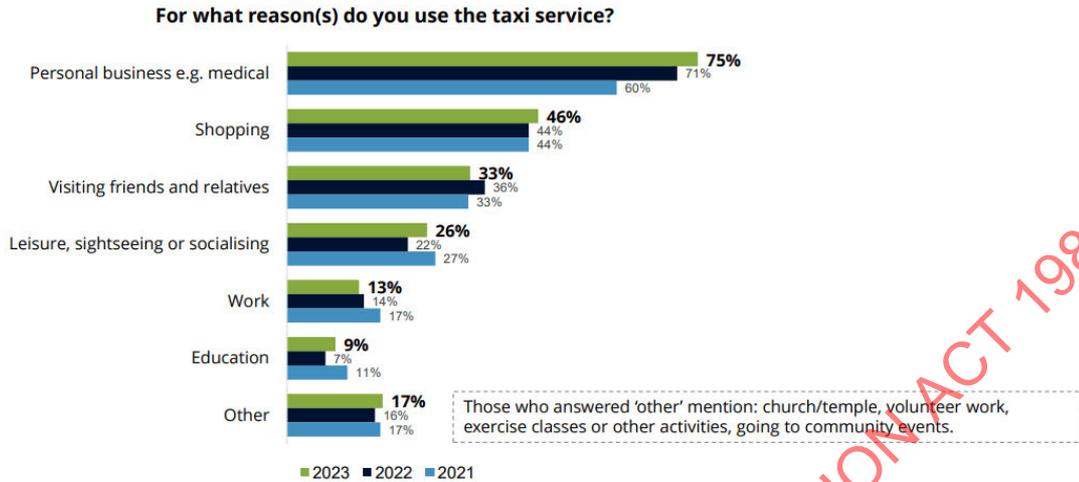
**The figures for April 2024 show:**

- Average fare \$48.11
- Average duration 18.62min
- Average distance 13.80km
- Any other demographic data you'd be able to provide (e.g. gender, ethnicity). Most users are Pakeha over 65+, but we have seen an increase of the Indian and Asian population entering the scheme This may reflect a wider demographic of assessors (we know there are some language difficulties for clients).

We have some more difficult questions which you may not have data on, but if you knew where we could find it could you please let me know (or if this even exists)?

- Whether a person who uses the scheme also has access to other transport schemes, yes, in Auckland each TM card holder has the accessible concession [Accessible concession \(at.govt.nz\)](#) loaded to use scheduled PT or they are SuperGold users too. In Auckland TM card holders also have access to the PlusOne Bus companion concession since 2022 [Plus One Bus Companion making bus travel more accessible \(at.govt.nz\)](#)
- Any socio-economic information about the typical user, most users are superannuants or receive some sort of disability allowance
- Purpose of trips. From our FY24 survey results:

## The majority are increasingly using the taxi service to attend to personal business such as medical appointments.



Ideally we'd like to know how has this profile has changed over time as well (if this exists). This would help us paint a better picture of how the scheme has transformed over time. [The numbers of clients have increased substantially over recent years. See AAR to Waka Kotahi and the Ministry's own TM dashboard Funding and transport – dashboard and open data | NZ Transport Agency Waka Kotahi \(nzta.govt.nz\).](#) The move to the half price fares scheme triggered major changes to client behaviour with a substantial increase in trips. This reflects the price sensitive nature of the client base. Please note we still have over 60% of clients who don't take a single trip a year.

We understand this data is sensitive, but if you're able to provide us non-identifiable, anonymous details we think this would be extremely useful to assist and develop the review.

Additionally, what are thoughts about reaching out directly to assessment organisations, like Age Concern NZ, to ask about the assessment process? This is something we could ask for when we go out for public consultation, but it could be beneficial to get more details from an assessor earlier on (unless you held this information in your organisations). [Yes, please refer to the list of our assessor agencies How to get a Total Mobility AT HOP card Please note Age Concern Auckland ceased doing TM assessments for AT in June 2024](#)

Happy to set up a call if needed.

Ngā mihi nui,

**Kathleen Wong** (she / her)

Kaitohutohu | Adviser – Urban Development and Public Transport

**Te Manatū Waka - Ministry of Transport**

s 9(2)(a)

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| Tel: +64 4 439 9000 |

**Auckland** | NZ Government Auckland Policy Office | Level 7, 167B Victoria Street West | PO Box 106238 | Auckland City | Auckland 1143 | NEW ZEALAND | Tel: +64 4 439 9000 |

**From:** Kathleen Wong  
**To:** Whitney Adam; Nick Potter; Callum Gill; Dmitry Hitenkoff  
**Subject:** FW: Demographics of Total Mobility Users  
**Date:** Friday, 30 August 2024 1:54:00 pm  
**Attachments:** image001.png  
 image002.png  
 image003.png  
 image006.png  
 image007.png  
 image008.png  
 image009.png  
 image010.png

**From:** Mary Norris s 9(2)(a)  
**Sent:** Friday, August 30, 2024 1:27 PM  
**To:** Kathleen Wong s 9(2)(a); Mary McLaren s 9(2)(a)  
**Cc:** Renee Gent s 9(2)(a)  
**Subject:** Demographics of Total Mobility Users

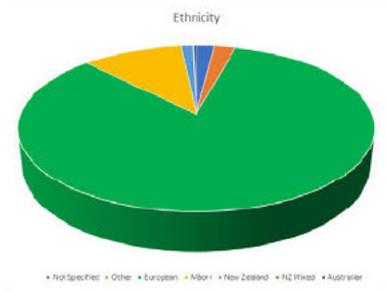
Hi Kathleen,

Thank you for asking us to provide some information to you regarding Total Mobility clients here in the Bay of Plenty. I hope the following is helpful. As you will be aware a lot of information is held in RideWise and it doesn't always provide the reports that we need, and in case what we would need to answer all your questions.

The Accessible Transport team's inaugural Total Mobility and Accessibility Concession survey conducted at the end of 2023 yielded valuable insights, with an 18% response rate from approximately 780 respondents. Some of the information gathered is included in the tables and charts below.

Questions

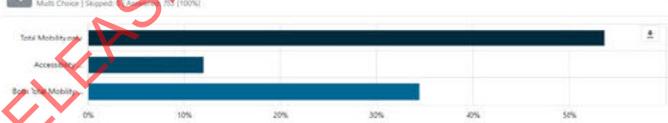
- Ages of users** 6yrs -103yrs
- Range of disability types** We have clients that have one or more of the following impairments: Mobility, Sensory, Intellectual, Metal Health, Neurological. While some information is collected in more detail in the assessment forms, there is no provision in the RideWise system to drill down further.
- Typical duration of travel.** To do this calculation we took the total transactions for the month of July 2024 and through spreadsheet calculations were able to work out that the current average trip is 10minutes 30 seconds.
- Other demographic data?** The following graphs are from the results of our survey which will give you a sample size of information, ethnicity, purpose of trips, TM or AC user or both.



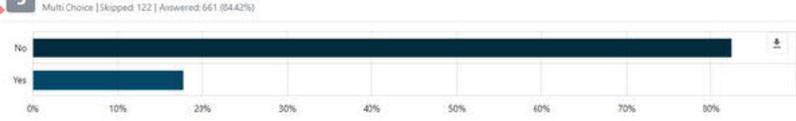
3 What do you use our accessible transport services for the most?



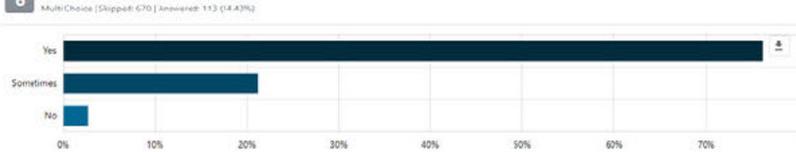
4 Are you an Accessibility Concession or Total Mobility scheme user? Required



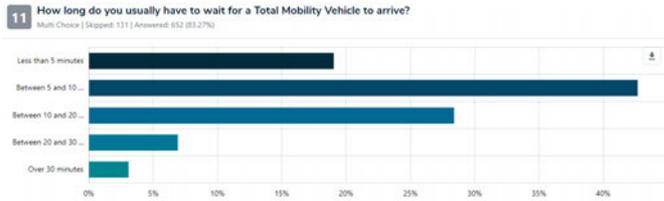
5 Do you use a wheelchair accessible/hoist vehicle?



6 If yes, are wheelchair accessible/hoist vehicles available when you need them?



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5. We cannot provide quantifiable data regarding whether a client has access to other transport schemes but we do know that there are clients that have access to ACC or Workbridge who also use their TM card for travel, effectively meaning a no dollar spend for them.

6. Socio-economic information is not data we collect.

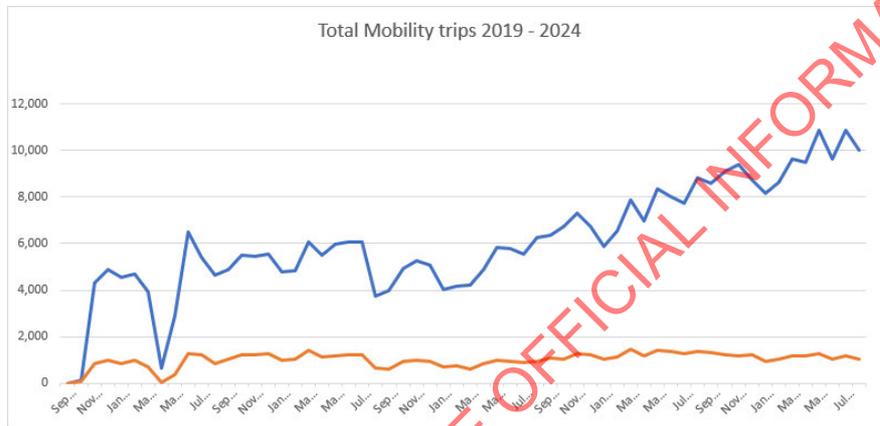
7. How has the general profile of the TM client changed over time?

Most TM clients are in the older age bracket, however the table below taken from RideWise shows that over the last 2 years we are seeing an increase in the 2 middle age ranges.

We do know that some operators have been actively promoting their services promoting the scheme which has been changing the purpose of trips taken. The increase in subsidy has certainly increased the volume and length of trips.

	new clients	<20	21-60	61-80	81+
8/2022-8/2023	1,130	30	121	368	611
9/2023 - 8/2024	1,501	50	217	499	735

8. This last graph shows the growth in trips from 2019 – 2024. While hoist use has remained consistent the total number of trips has certainly grown.



## A selection of comments from the survey.

I think it is ideal.  
 It's a good service, very much appreciated - a lifeline.  
 It's excellent, no change necessary.  
 I usually try to book ahead of time to avoid problems. I am visually impaired.  
 Ensure that whatever the hour that I need them (often the middle of the night) that I can use them, and they will arrive promptly.  
 Invariably excellent.  
 Very happy- I try to book ahead for a time that suits.  
 It is a real help as being in a resthome doesn't leave a person with much spare cash for transport costs.  
 Allows him to have a social life makes his life so much easier and safer.  
 The affordability and increased access to places at a distance. Less stress.  
 The scheme allows me to get out and about & to maintain some of my independence.  
 Happy with the service we have at the moment.  
 Easy to access. Reasonable \$.  
 It works well for me. It's all about good communication with the provider.  
 The 75% discount is so very, very helpful. A god send. I am a pensioner, and the Total Mobility is well within my budget. Thank you, Regional Council.  
 The price is a great help. Knowing I can keep my appointments without worrying 'how am I going to get there'  
 As I can no longer drive, this scheme lets me stay independent and get to where I need go.  
 Accessibility. Value for Money. Reliability.  
 Paramount support for people with disabilities who want to maintain independence and peace of mind  
 Fabulous service enables my 99-year-old mother in wheelchair to get places. Very grateful.  
 The system/service that you provide for my current circumstances are wonderful thank you. And down the track as I age and "wear down" I will have to use more services provided by you. Again, thanks. (client in the 85+ bracket)  
 Brilliant scheme - a blessing  
 As it is the only way I have of getting out of the house I like it very much. Also, the taxi drivers are so very helpful and friendly. When I was able to see well enough to do my shopping, they would always carry it in for me.  
 It's a good service, very much appreciated - a lifeline.  
 1) 70% discount; (2) It is affordable - so very helpful from a mental health point of view. I am able to get out of the house, and not be home bound; (3) the taxi & shuttle drivers are very friendly and helpful; and (4) I get from A to B quickly. Thank you, Total Mobility.

I hope this information is helpful. If you require anything more, or more detail please come back to me.

Kind regards

Mary

**Mary Norris**

Transport Support  
Transport Operations

**Bay of Plenty Regional Council Toi Moana**

P: 0800 884 880 s 9(2)(a)

s 9(2)(a)

s 9(2)(a) W: [www.boprc.govt.nz](http://www.boprc.govt.nz)

A: PO Box 364, Whakatāne 3158, New Zealand

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# Document 9

**From:** [Nathan Gill](#)  
**To:** [Kathleen Wong](#)  
**Cc:** [Whitney Adam](#); [Callum Gill](#); [Nick Potter](#)  
**Subject:** RE: Demographics of Total Mobility Users  
**Date:** Tuesday, 20 August 2024 9:18:53 am  
**Attachments:** [image001.png](#)  
[Test-C2\\_16ac23d1-728d-4b89-abd1-c4f9f8ebb9cb1.png](#)

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Hi Kathleen,

Thanks for your email.

I have provided answers to your questions as best I can in a relatively short time-frame, and I have placed responses below in RED – Hopefully these are the answers you’re looking for.

May I also drop in a **summary of usage** that I produced for April 2024 for our own snapshot:

TM usage from April 2024 for Gore and Invercargill.

- There were 10302 Trips taken for the month.
- The average total fare cost was \$20.38
- The average concession paid was \$15.12
- The average number of kms travelled was 6.05km\*
- 811 different clients took trips
- The average number of trips taken per client was 12.7
- The highest number of trips taken by an individual client was 110 (second place was 100)
- 30 Clients took 50 trips or more
- 337 clients took 5 trips or less

The average kms per trip\* figure is subject to accuracy issues as entered by the drivers.

For context, prior to 2020, our typical annual trips were in the 50,000 - 52000 range. Average fare cost for our region for the previous years was fairly static at approx \$12.00 - \$14.00 (average concession was \$6.00 - \$7.00)

Since the 75/25 concession was introduced, the trip numbers have increased significantly (which I’m sure is well known).

I trust this information is helpful. Should you wish for any of this to be further explained, or other data is desired, please contact me.

Kind regards

Nathan Gill  
TM Co-ordinator Southland

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**Nathan Gill**

---



**Road Corridor Engineer**

s 9(2)(a)

s 9(2)(a)

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**From:** Kathleen Wong s 9(2)(a)

**Sent:** Monday, 19 August 2024 3:57 PM

**To:** Nathan Gill s 9(2)(a)

**Cc:** Whitney Adam s 9(2)(a) Callum Gill s 9(2)(a) Nick Potter s 9(2)(a)

**Subject:** Demographics of Total Mobility Users

Kia ora Nathan

I am part of the team at the Ministry of Transport working on the Total Mobility Review. As you may know, the Ministry of Transport is undertaking a review of the Total Mobility Scheme to understand if it is appropriately serving those who need it the most [I'd also like to note our website is out of date and no longer 100% accurate – we're in the process of updating this!].

Penelope Sanchez (AT) has passed on your details to enquire about data your organisation might hold about Total Mobility (TM) users.

The Ministry currently does not have a clear profile of the typical TM user, so we do not fully understand the extent of the Scheme's impact to those who use it, or who struggle to access taxi services when needed.

If you had the data readily available, we are hoping you might be able to provide some information about the following:

- Ages of users, **In the last 12 months, we have added 437 new clients to the scheme in Southland:**  
    <20 = 16

21-60 = 62  
61-80 = 168  
80+ = 191

Up until recently, the client D.O.B. wasn't mandatory, so we only have mixed data on the age of our entire client base – see below.

- **Complete Age range summary**

- 0-10 = 8\*
- 11-20 = 26
- 21-30 = 90
- 31-40 = 58
- 41-50 = 62
- 51-60 = 156
- 61-70 = 248
- 71-80 = 482
- 81-90 = 704
- 90+ = 307\*
- Not defined = 170

\*I would treat all age data collected for the 0-10 range and 90+ range with caution. Since D.O.B. became mandatory in Ridewise, to update a client's address, we've needed the client's date of birth, meaning a faux d.o.b. being entered on occasion to get the address up-to-date - hence the very old or very young age data anomaly.

-

- **Range of disability type(s),**

We currently 2311 Active Clients in total (you'll note that the summation does not equal the client number. This is due to some clients having multiple disability types noted on their assessment.)

Not Specified = 257 (these are the clients who were transferred over to Ridewise in 2018 conversion from our previous paper-based system. Impairment types for existing clients were not researched and entered)

Sensory = 626

Physical = 1580

Neurological = 666

Mental = 281

Intellectual = 205

- **Typical duration of travel,**

- Not sure how to generate this data from Ridewise

- **Any other demographic data you'd be able to provide (e.g. gender, ethnicity).**

Male = 843

Female = 1402

Not Specified = 66

European = 1997  
Maori = 141  
Asian = 8  
American = 3  
Other = 45  
Other: New Zealander = 76  
Not Specified = 41

We have some more difficult questions which you might not have data on, but if you are able to provide some insight on the following it is greatly appreciated:

- Whether a person who uses the scheme also has access to other transport schemes, **Don't know this information.**
- Any socio-economic information about the typical user, **Not recorded. In the 9 years I have administered the scheme for Southland, I would suggest that a TM client comes from all walks of life in our community, across all socio-economic sectors, and ages.**
- Purpose of trips. **This is not recorded. The scheme is to allow clients to connect with their community. There is no stipulation for the purpose of the trip to be categorised/justified in order to access the concession.**

Ideally we would like to know how has this profile has changed over time as well (if this data exists). This would help us paint a better picture of how the Scheme has transformed over time in your region. – **We don't have any prior gathered data summary of the questions asked**

We understand this data is sensitive, but if you are able to provide us anonymised data this would be extremely useful to assist and develop the review. We will also be going out for public consultation later in the year to collect insight from those involved in the Scheme (i.e. users, operators, and PTAs).

Please do not hesitate to reach out if you had any questions.

Ngā mihi nui,

**Kathleen Wong** ([she / her](#))

Kaitohutohu | Adviser – Urban Development and Public Transport

**Te Manatū Waka - Ministry of Transport**

s 9(2)(a)

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**Auckland** | NZ Government Auckland Policy Office | Level 7, 167B Victoria Street West | PO Box

# Document 10

**From:** [Sharon Boyle](#)  
**To:** [Kathleen Wong](#)  
**Cc:** [Dan Daly](#); [Clare Collins](#); [Bianca Kathan](#); [Whitney Adam](#)  
**Subject:** RE: Demographics of Total Mobility Users  
**Date:** Friday, 25 October 2024 11:32:27 am  
**Attachments:** [image001.png](#)  
[image002.png](#)

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Kia Ora Kathleen  
Thanks for your email

I'm able to provide the following additional information that I trust you find helpful (but I'm sorry I can't provide all the information you have asked for):

- There are currently 16,320 active Total Mobility clients registered for TM in Canterbury. Of these, there are 220 with a temporary client status. I'm sorry I don't have any hard data on those with fluctuating impairments
- Some common barriers identified for people with disabilities to access TM would be language, support networks for people living alone, especially older people; physical barriers for some clients, and geographical barriers for clients living in more rural areas.
- We too have noticed an increase in new clients coming on the scheme with mental health related disabilities such as anxiety in Christchurch post Covid.
- There are currently 48 wheelchair accessible vehicles operating in Canterbury.

The information outlined in your email seems to be an accurate representation of TM users in Canterbury.

Nga mihi  
Sharon

---

**From:** Kathleen Wong [s 9\(2\)\(a\)](#)  
**Sent:** Friday, October 25, 2024 10:05 AM  
**To:** Sharon Boyle [s 9\(2\)\(a\)](#)  
**Cc:** Dan Daly [s 9\(2\)\(a\)](#); Clare Collins [s 9\(2\)\(a\)](#); Bianca Kathan [s 9\(2\)\(a\)](#); Whitney Adam [s 9\(2\)\(a\)](#)  
**Subject:** RE: Demographics of Total Mobility Users

Some people who received this message don't often get email from [s 9\(2\)\(a\)](#) [Learn why this is important](#)

**Caution:** This is an email from an external party. Please take care when clicking links or opening attachments.

Apologies I attached the old version of the document. Please ignore and use this latest version.

Ngā mihi nui,  
**Kathleen Wong** ([she / her](#))  
Kaitohutohu | Adviser – Urban Development and Public Transport  
**Te Manatū Waka - Ministry of Transport**  
[s 9\(2\)\(a\)](#) [www.transport.govt.nz](http://www.transport.govt.nz)



---

**From:** Kathleen Wong  
**Sent:** Friday, October 25, 2024 9:00 AM  
**To:** Sharon Boyle s 9(2)(a)  
**Cc:** Dan Daly s 9(2)(a) Clare Collins s 9(2)(a) Bianca Kathan  
s 9(2)(a) Whitney Adam s 9(2)(a)  
**Subject:** RE: Demographics of Total Mobility Users

Kia ora Sharon

Thank you again for providing the data below. I've collated the data you've provided and tried to come up with a 'user profile' of TM users in Christchurch.

Could you and/or your team please have a look at the attachment and let you know if it's an accurate representation of TM users in Christchurch? I understand data will be limited, but anything additional you're able to provide will great

If you had any feedback, can you please get this to me by **COP Tuesday 29 Oct?**

Ngā mihi nui,  
**Kathleen Wong** ([she / her](#))  
Kaitohutohu | Adviser – Urban Development and Public Transport  
**Te Manatū Waka - Ministry of Transport**  
s 9(2)(a) [www.transport.govt.nz](http://www.transport.govt.nz)



---

**From:** Kathleen Wong  
**Sent:** Thursday, September 5, 2024 11:41 AM  
**To:** Sharon Boyle s 9(2)(a)  
**Cc:** Dan Daly s 9(2)(a) Clare Collins s 9(2)(a) Bianca Kathan  
s 9(2)(a) Whitney Adam s 9(2)(a) Callum Gill  
s 9(2)(a) Nick Potter s 9(2)(a)  
**Subject:** RE: Demographics of Total Mobility Users

Kia ora Sharon

We've discovered that RideWise is a very difficult to access database across all councils so we appreciate the content you've been able to provide

Ngā mihi nui,  
**Kathleen Wong** ([she / her](#))  
Kaitohutohu | Adviser – Urban Development and Public Transport  
**Te Manatū Waka - Ministry of Transport**  
s 9(2)(a) [www.transport.govt.nz](http://www.transport.govt.nz)



---

**From:** Sharon Boyle s 9(2)(a)  
**Sent:** Thursday, September 5, 2024 11:24 AM  
**To:** Kathleen Wong s 9(2)(a)  
**Cc:** Dan Daly s 9(2)(a) Clare Collins s 9(2)(a) Bianca Kathan  
s 9(2)(a) Whitney Adam s 9(2)(a) Callum Gill

**Subject:** RE: Demographics of Total Mobility Users

Hi Kathleen

Apologies for not responding sooner.

Unfortunately, most of the information you are requesting is not easily extracted or available.

The information you seek relative to data for the Canterbury region that is available includes:

- Age of users:
  - 1% are under 20 yrs
  - 12% are between 21 – 60 years
  - 87% are 61 years or older

- Range of disabilities /impairments

- Wide ranging : Physical, sensory, mental health, neurological and intellectual

We do not have reports that specifically filter by disability type but as a generalisation, we do have agencies that assess clients for eligibility in disability fields their organisations specialise in ( such as Blind Low Vision NZ).

Using that as a guide :

- 8% of active clients have neurological impairments – \*see note below
- 6% of active users have sensory impairments
- 1% of active users have intellectual impairments
- 85% of active users have a combination of either physical, mental health or multiple impairments.

\*The number of active users with neurological impairments is likely higher than noted as there are a number of active clients that were registered with the Stroke Foundation, but this organisation has withdrawn from Total Mobility and their clients were transferred to a general agency recently.

- Purpose of trips.- no specific reports available to extract this data, but Environment Canterbury has engaged with a company (Research First) to conduct Customer Satisfaction Surveys ( randomly selected clients are contacted to seek their views on their Total Mobility experiences. The snip below shows the results from the 2023 survey on trip purpose since 2020 ( please note this is a snapshot in time).

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**Table 2: Main purpose for using Total Mobility (n=380)**

	2020	2021	2022	2023
1 Shopping	25%	38%	27%	38%
2 Hospital/doctors	52%	40%	45%	34%
3 Social outings	11%	10%	14%	12%
4 Other				
TOTAL	11%	11%	12%	14%
Paid work	2%	2%	3%	4%
Daycare programmes	2%	2%	4%	4%
Everything	1%	2%	1%	2%
Voluntary work	1%	1%	1%	1%
Educational facilities	1%	1%	1%	1%
Sport/exercise	1%	1%	0%	0%
Other	4%	2%	2%	1%
5 Don't know/not sure.	1%	2%	2%	1%

I trust you find this information useful , and apologies that most of the data you have requested is not available.

Kind regards  
Sharon

**From:** Kathleen Wong s 9(2)(a)  
**Sent:** Wednesday, September 4, 2024 10:05 AM  
**To:** Jeremy Dickson s 9(2)(a) Sharon Boyle s 9(2)(a) Dan Daly s 9(2)(a)  
**Subject:** RE: Demographics of Total Mobility Users

Some people who received this message don't often get email from s 9(2)(a) [Learn why this is important](#)

**Caution:** This is an email from an external party. Please take care when clicking links or opening attachments.

Kia ora koutou

I realise I never included a due date for this data, apologies for this. Do you think you'd be able to provide this to us by the **end of this week (Friday 6 September)** please?

If you're not the right people to be contacting at ECan, could you please provide me with the correct details?

Happy to call if you wanted to chat about it first.

Ngā mihi nui,  
**Kathleen Wong** ([she / her](#))  
 Kaitohutohu | Adviser – Urban Development and Public Transport  
**Te Manatū Waka - Ministry of Transport**  
 s 9(2)(a) [www.transport.govt.nz](http://www.transport.govt.nz)

**From:** Kathleen Wong

**Sent:** Monday, August 19, 2024 3:57 PM

**To:** Jeremy Dickson s 9(2)(a) s 9(2)(a)

**Cc:** Whitney Adam s 9(2)(a) Callum Gill s 9(2)(a) Nick Potter  
s 9(2)(a)

**Subject:** Demographics of Total Mobility Users

Kia ora koutou

I am part of the team at the Ministry of Transport working on the Total Mobility Review. As you may know, the Ministry of Transport is undertaking a review of the Total Mobility Scheme to understand if it is appropriately serving those who need it the most [I'd also like to note our website is out of date and no longer 100% accurate – we're in the process of updating this!].

Penelope Sanchez (AT) has passed on your details to enquire about data your organisation might hold about Total Mobility (TM) users.

The Ministry currently does not have a clear profile of the typical TM user, so we do not fully understand the extent of the Scheme's impact to those who use it, or who struggle to access taxi services when needed.

If you had the data readily available, we are hoping you might be able to provide some information about the following:

- Ages of users,
- Range of disability type(s),
- Typical duration of travel,
- Any other demographic data you'd be able to provide (e.g. gender, ethnicity).

We have some more difficult questions which you might not have data on, but if you are able to provide some insight on the following it is greatly appreciated:

- Whether a person who uses the scheme also has access to other transport schemes,
- Any socio-economic information about the typical user,
- Purpose of trips

Ideally we would like to know how this profile has changed over time as well (if this data exists). This would help us paint a better picture of how the Scheme has transformed over time in your region.

We understand this data is sensitive, but if you are able to provide us anonymised data this would be extremely useful to assist and develop the review. We will also be going out for public consultation later in the year to collect insight from those involved in the Scheme (i.e. users, operators, and PTAs).

Please do not hesitate to reach out if you had any questions.

Ngā mihi nui,

**Kathleen Wong** ([she / her](#))

Kaitohutohu | Adviser – Urban Development and Public Transport

**Te Manatū Waka - Ministry of Transport**

s 9(2)(a)

[www.transport.govt.nz](http://www.transport.govt.nz)

# Document 11

**From:** [Kathleen Wong](#)  
**To:** [Chyna-Rose Wood](#)  
**Cc:** [Rob Braddock](#); [Whitney Adam](#)  
**Subject:** RE: Demographics of Total Mobility Users  
**Date:** Tuesday, 29 October 2024 3:32:00 pm  
**Attachments:** [image002.png](#)

---

Kia ora Chyna

Thanks for reviewing this

Happy for you to look at this next week, it might be a bit late but we can have it on hand anyway for future reference.

Ngā mihi nui,

**Kathleen Wong** ([she / her](#))

Kaitohutohu | Adviser – Urban Development and Public Transport

**Te Manatū Waka - Ministry of Transport**

s 9(2)(a)

[www.transport.govt.nz](http://www.transport.govt.nz)



---

**From:** Chyna-Rose Wood s 9(2)(a)

**Sent:** Tuesday, October 29, 2024 10:02 AM

**To:** Kathleen Wong s 9(2)(a)

**Cc:** Rob Braddock s 9(2)(a); Whitney Adam s 9(2)(a)

**Subject:** RE: Demographics of Total Mobility Users

Kia ora Kathleen,

Thanks, I had a look over and it all looks accurate

You have caught us while we are flat tack in our final week of our transport operator procurement, so we don't have the time this week to put into the insight's questions this week

We can carve some space for this mahi next week if that not to late for you?

Noho ora mai

**Chyna-Rose Wood**

**Ngāti Tūwharetoa**

**She/Her/la**

Kaitohutohu o Te Hunga Whaikaha Total Mobility

Metlink



**Te Hunga Whaikaha  
Total Mobility**  
A Metlink service

---

**From:** Kathleen Wong <sup>s 9(2)(a)</sup>  
**Sent:** Friday, 25 October 2024 10:05 am  
**To:** Chyna-Rose Wood <sup>s 9(2)(a)</sup>  
**Cc:** Rob Braddock <sup>s 9(2)(a)</sup> Whitney Adam <sup>s 9(2)(a)</sup>  
**Subject:** RE: Demographics of Total Mobility Users

Apologies I attached the old version of the document. Please ignore and use this latest version.

Ngā mihi nui,

**Kathleen Wong** ([she / her](#))

Kaitohutohu | Adviser – Urban Development and Public Transport

**Te Manatū Waka - Ministry of Transport**

M: 022 100 1473 | E: [k.wong@transport.govt.nz](mailto:k.wong@transport.govt.nz) | [www.transport.govt.nz](http://www.transport.govt.nz)



---

**From:** Kathleen Wong  
**Sent:** Friday, October 25, 2024 9:00 AM  
**To:** Chyna-Rose Wood <sup>s 9(2)(a)</sup>  
**Cc:** <sup>s 9(2)(a)</sup> Whitney Adam <sup>s 9(2)(a)</sup>  
**Subject:** RE: Demographics of Total Mobility Users

Kia ora Chyna

Thank you again for providing the data below. I've collated the data you've provided and tried to come up with a 'user profile' of TM users in Wellington.

Could you and/or your team please have a look at the attachment and let you know if it's an accurate representation of TM users in Wellington? I understand data will be limited, but anything additional you're able to provide will great

If you had any feedback, can you please get this to me by **COP Tuesday 29 Oct?**

Ngā mihi nui,

**Kathleen Wong** ([she / her](#))

Kaitohutohu | Adviser – Urban Development and Public Transport

**Te Manatū Waka - Ministry of Transport**

<sup>s 9(2)(a)</sup>

[www.transport.govt.nz](http://www.transport.govt.nz)

---

**From:** Chyna-Rose Wood s 9(2)(a)  
**Sent:** Wednesday, September 11, 2024 4:30 PM  
**To:** Kathleen Wong s 9(2)(a)  
**Subject:** RE: Demographics of Total Mobility Users

Ohhhh sorry this has been sitting in my drafts

Kia ora Kathleen,

Great meeting you too, its all ways worth talking through the data

Before I put my thoughts in to writing I have to get it sense checked. Ill get it back to when other eyes have approved

If you have any other Te Hunga Whaikaha Total Mobility data questions I'm always keen to korero about it

Noho ora mai

**Chyna-Rose Wood**  
**Ngāti Tūwharetoa**  
She/Her/Ia

Kaitohutohu o Te Hunga Whaikaha Total Mobility  
**Metlink**



**Te Hunga Whaikaha**  
**Total Mobility**  
A Metlink service

---

**From:** Kathleen Wong s 9(2)(a)  
**Sent:** Thursday, 5 September 2024 11:56 am  
**To:** Chyna-Rose Wood s 9(2)(a)  
**Subject:** RE: Demographics of Total Mobility Users

Kia ora Chyna

Great to meet you yesterday, was really good to chat in person about all the caveats with this data etc

Could you please clarify the impact of Accessible Concessions on TM? I wrote down the following but I'm not clear about how they impact each other:

- Accessible Concession (50% discount for those with disabilities)
  - Some regions don't have the eligibility criteria the Accessible Concession, there is only criteria for TM. *[This means the (12% only on PT, buses and trains slide)???*
  - Since they can access TM, why would they use the Accessible Concession for PT?
  - The roll out of the NTS will impact the Accessible Concession

Ngā mihi nui,

**Kathleen Wong** ([she / her](#))

Kaitohutohu | Adviser – Urban Development and Public Transport

**Te Manatū Waka - Ministry of Transport**

s 9(2)(a)

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---

**From:** Chyna-Rose Wood s 9(2)(a)

**Sent:** Wednesday, September 4, 2024 12:21 PM

**To:** Kathleen Wong s 9(2)(a)

**Subject:** Demographics of Total Mobility Users

Here is our data, see you soon

Noho ora mai

**Chyna-Rose Wood**

**Ngāti Tūwharetoa**

She/Her/la

Kaitohutohu o Te Hunga Whaikaha Total Mobility

**Metlink**



**Te Hunga Whaikaha  
Total Mobility**  
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**MINISTRY OF TRANSPORT**

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**Auckland** | NZ Government Auckland Policy Office | Level 7, 167B Victoria Street West | PO Box 106238 | Auckland City | Auckland 1143 | NEW ZEALAND | Tel: +64 4 439 9000 |

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## Demographics of Te Hunga Whaikaha Total Mobility Users

21<sup>st</sup> August 2024

16,104 active customers
39,727 Profiles created in RideWise

None of these reports will have the same total number of customers

This data is limited by a range of factors:

- Ridewise extract capabilities.
- Mandatory fields.
- Original RideWise migration
- The anonymization of data

Active customers – the profile is active in Ridewise

Profiles created – includes duplicates and GW created cards

Ages of active users	
Age Range	Customers
0-9	53
10-19	368
20-29	597
30-39	553
40-49	627
50-59	1096
60-69	1787
70-79	3294
80-89	5171
90-99	2695
100-109	104

Based off export of active profile,  
the larger number of 0-9 & 100-109 is due to

- incorrect birthdays
- temporary cards
- (90-109) not being informed of a customer's passing
- missing customers with no birthday entered

Age recorded	
No age provided	2082
0-16	483
17-29	1052
30-64	4783
65+	19584

Based off export of profile created with assessments.

Impairment Category	Total
Intellectual	322
Intellectual,Mental	69
Intellectual,Mental,Neurological	32
Intellectual,Mental,Neurological,Physical	7
Intellectual,Mental,Neurological,Physical,Sensory	18
Intellectual,Mental,Neurological,Sensory	10
Intellectual,Mental,Physical	42
Intellectual,Mental,Physical,Sensory	24
Intellectual,Mental,Sensory	22
Intellectual,Neurological	55
Intellectual,Neurological,Physical	58
Intellectual,Neurological,Physical,Sensory	37
Intellectual,Neurological,Sensory	25
Intellectual,Physical	167
Intellectual,Physical,Sensory	78
Intellectual,Sensory	79
Mental	147
Mental,Neurological	48
Mental,Neurological,Physical	102
Mental,Neurological,Physical,Sensory	43
Mental,Neurological,Sensory	11
Mental,Physical	500
Mental,Physical,Sensory	88
Mental,Sensory	43
Neurological	766
Neurological,Physical	1978
Neurological,Physical,Sensory	807
Neurological,Sensory	119
Physical	6670
Physical,Sensory	2093
Sensory	570

Based off export of profile created with assessments.

### Typical duration of travel

	Average fare	Average duration	Average customer pays	Concession
2018/19	\$19.16	0:09:42	\$ 9.40	50%
2020/21	\$20.96	0:10:05	\$ 10.00	Covid free & 50%
2023/24	\$ 28.24	0:10:27	\$ 8.00	75%

### Demographic data

<b>Gender Makeup of THWTM</b>	
Blank	1,793
Female	8,384
Gender Diverse	5
Male	4,847
Prefer Not To Say	1

Based off export of active profile with assessments, and from June 2023 no longer a required field

<b>Ethnicity</b>	
<b>European</b>	<b>20167</b>
<b>Blank</b>	<b>4199</b>
<b>Māori</b>	<b>1735</b>
<b>other</b>	<b>1051</b>
<b>Asian</b>	<b>832</b>

Based off export of profile created with assessments, and from June 2023 no longer a required field.

<b>Profiles created per year</b>	
Year	Profiles created
2014	1558
2015	1608
2016	1780
2017	1991
2018	2660
2019	2628

2020	2335
2021	2050
2022	2248
2023	2851
2024	1848

Total number of profiles created with in a year

- Large number of duplicate profiles created due to Ridewise fault
- No ability to see number of active profiles at a given time

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## Total Mobility user profile | Greater Wellington Regional Council

Prepared by	Kathleen Wong
Last updated	25/10/24
PTA contacts	Chyna-Rose Wood s 9(2)(a) Rob Braddock s 9(2)(a)

## Total Mobility user demographics: Greater Wellington Regional Council

### Purpose of a Total Mobility user profile

The purpose of this Total Mobility user profile for Greater Wellington Regional Council (GWRC) is to assist with the review of the Total Mobility scheme. It helps to build a picture of who uses Total Mobility, for what purpose and how this may have changed over time. It also helps to guide any recommendations made in the review.

The information requested by Ministry of Transport of councils (if available) about registered Total Mobility users include:

- Age
- Disability or impairment type(s)
- Any other demographic data (e.g. gender, ethnicity)
- Typical duration of travel
- Whether a person who uses the scheme also has access to other transport schemes
- Any socio-economic information about the typical user

### Information sources and limitations

Information sources include:

- Ridewise, the main system used by most councils to record Total Mobility trips.
- GWRC led customer satisfaction survey for Total Mobility users in 202X [are the latest survey results available yet?].

Limitations of the information are:

- Demographic data of Total Mobility users is not collected or monitored by all PTAs.

- Some councils have identified gaps in data meaning these conclusions may not be entirely representative of the Total Mobility users.

## Summary of Total Mobility users in Wellington

### **Age**

Total Mobility users in Wellington are typically older (over 65) and with many aged over 80 years old.

### **Disability type**

The type of disability that people report in Wellington is very wide ranging and often many people have multiple disabilities or impairments, and generally change and multiply the older the person is. The scheme saw an increase in the number of new people using the scheme with mental health related disability, such as anxiety, following Covid. This is especially the case in urban areas, such as Auckland and Wellington. Many have access to and use other disability schemes and/or funding for transport, in addition to Total Mobility.

Are you aware of the common barriers those with disabilities have to access TM?

Would you be able to provide a ballpark figure of the number of permanent, temporary and fluctuating disabilities/impairments?

### **Ethnicity**

Most people who use the scheme across both rural and urban areas identify as Pākehā/NZ European. This is consistent with trends in the annual Household Travel Survey data (conducted by the Ministry of Transport) which selects over 2,000 households to complete the survey to note their travel patterns; the proportion of those who drive themselves is almost double of those who are a passenger being driven in a vehicle for Pākehā/NZ European.

Compared to the other ethnicities that are collected (Māori, Pasifika, Asian, and Other), the number of drivers versus travelling as a passenger is more similar. Based on available TM data, it is not clear why there is a significant difference between ethnicities. However, anecdotal data suggests there are differences due to ethnically different household makeup; for example, a Pasifika person who finds it difficult driving themselves or using public transport may have a wider network of people available to transport them to and from locations because they live in intergenerational housing and have family available to assist them.

### **Gender**

More women than men use the scheme in Wellington. This may correlate with a higher proportion of older women than men, when considering the New Zealand population age profile. There is no information about people who identify as gender diverse who use the scheme as this information is not collected by Ridewise or the PTAs.

## Trip purpose

Purpose?

Is the number of wheelchair vehicles operating in your region available?

Access to other schemes?

We have heard that for some users, TM trips make up part of their travel journey as they use TM to get to their closest public transport stop or station to use a bus, train, or ferry. This is reported as being because of poor access from their homes to and from the closest stop or station (e.g. they cannot walk up and down hills, there are regular obstacles on footpaths which they cannot move around).

There has been an increase of shorter-medium duration trips since the increase to a 75% subsidy in 2022. The average trip duration was 10 minutes long.

Those living in larger urban areas tend to have longer travel times due to traffic congestion [is this a correct assumption for Wellington?].

Those living in more rural / isolated areas also have longer travel times as the services they need are further away. [is this a correct assumption for Wellington?].

NZTA recently completed a study of Ridewise data (Total Mobility Data Analysis cost and usage trends 2019-2024).

The timing and introduction of half price fares, and the subsequent increase in TM subsidy from 50% to 75% coincide with the increased costs to the scheme. The detailed data analysis tells us that the subsidy change alone, was not the only influencing factor for increased costs.

The data analysis has found three casual factors, (against the backdrop of the subsidy increase) which combined have resulted in the increase in costs and patronage. The three elements summarised in figure 1 below are influencing cost increases which include:

1. The increase in registered users has grown year on year between 8-11% (through 2019 to 2024). Over this period there has been an increase of 30,937 people registered from 76,587 to 107,524 people.
2. The average increase in cost of a fare per trip since April 2022, aligns to cost of living increases including cost of fuel rising by \$7.86 per trip from \$23.51 to \$31.37.
3. The average increase in kilometres travelled by 2.6 kilometres per trip from 6.4 kms to 9kms, which coincides with post-covid lockdowns and subsequent community outbreaks.

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## TOTAL MOBILITY CUSTOMERS – DEMOGRAPHIC PROFILE

The following data is based on the following sources and limitations:

- As of August 2024 - 16,104 active customers, 39,727 Profiles created in RideWise<sup>1</sup>

Greater Wellington Regional Council	
Age	<p>As of August 2024:</p> <ul style="list-style-type: none"> <li>• 0-9: 53</li> <li>• 10-19: 368</li> <li>• 20-29: 597</li> <li>• 30-39: 553</li> <li>• 40-49: 627</li> <li>• 50-59: 1096</li> <li>• 60-69: 1787</li> <li>• 70-79: 3294</li> <li>• 80-89: 5171</li> <li>• 90-99: 2695</li> <li>• 100-109: 104</li> </ul> <p>Based off export of active profile, the larger number of 0-9 &amp; 100-109 is due to:</p> <ul style="list-style-type: none"> <li>• incorrect birthdays</li> <li>• temporary cards</li> <li>• (90-109) not being informed of a customer's passing</li> <li>• missing customers with no birthday entered</li> </ul> <p>All time:</p> <ul style="list-style-type: none"> <li>• No age provided: 2082</li> <li>• 0-16: 483</li> <li>• 17-29: 1052</li> <li>• 30-64: 4783</li> <li>• 65+: 19584</li> </ul>
Disability types	<p>Clients have one or more of the following:</p> <ul style="list-style-type: none"> <li>• Mobility</li> <li>• Sensory</li> <li>• Intellectual</li> <li>• Mental health</li> <li>• Neurological</li> </ul>

<sup>1</sup> This data is limited by a range of factors: Ridewise extract capabilities, mandatory fields, original RideWise migration, the anonymization of data, active customers – the profile is active in Ridewise, profiles created – includes duplicates and GW created cards

Gender	As of August 2024: <ul style="list-style-type: none"> <li>• N/A: 1793</li> <li>• Female: 8384</li> <li>• Male: 4847</li> <li>• Gender Diverse: 5</li> <li>• Prefer not to say: 1</li> </ul>
Ethnicity	<ul style="list-style-type: none"> <li>• European: 20167</li> <li>• Māori: 1735</li> <li>• Asian: 1051</li> <li>• Blank: 4199</li> <li>• Other: 1051</li> </ul>
Socio-economic profile	n/a, for now

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## TOTAL MOBILITY CUSTOMERS - TRIP PROFILE

<b>Region</b>	<b>Greater Wellington Regional Council</b>
Purpose of trips	n/a
Number of trips	n/a
Typical duration of travel	Generally consistent throughout the years: <ul style="list-style-type: none"> <li>• 2018/19: 9.42min</li> <li>• 2020/21: 10.05min</li> <li>• 2023/24: 10.27min</li> </ul>
User accessing other schemes	n/a
Wheelchair hoist required on trip	n/a
Is a wheelchair hoist available when needed?	n/a

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# Document 12. See document 6 for briefing

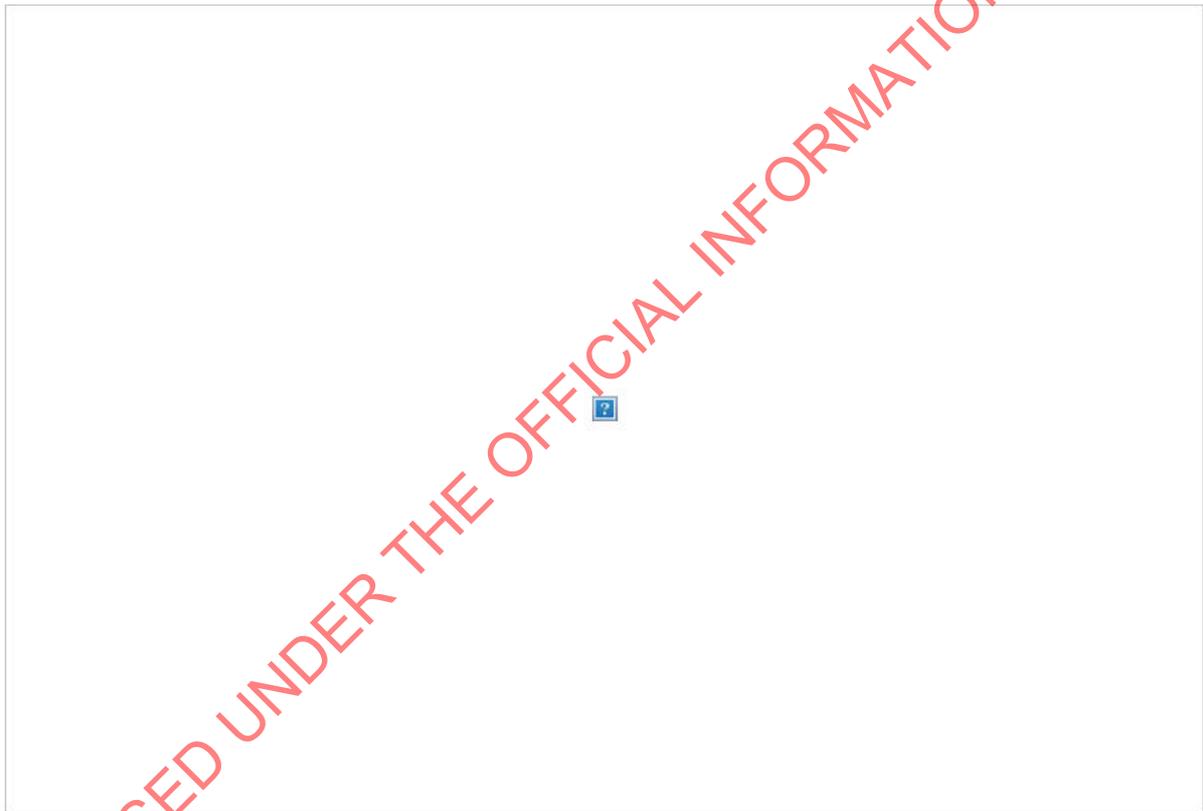
**From:** [Adam Lawrence](#)  
**To:** [s 9\(2\)\(a\)](#)  
**Cc:** [Annette Meates](#); [Whitney Adam](#)  
**Subject:** FW: OC250294 Community Connect, Total Mobility and SuperGold concessions - funding sustainability - Briefing - Policy  
**Date:** Friday, 4 April 2025 10:03:04 am  
**Attachments:** [image001.png](#)  
[image002.png](#)

---

[s 9\(2\)\(a\)](#)

I have run out of time for now, the following is some feedback so far:

[s 9\(2\)\(ba\)\(ii\)](#)



Ngā mihi  
Adam

**Adam Lawrence**

**Lead Advisor Public Transport**  
Transport Services

[s 9\(2\)\(a\)](#)

Waka Kotahi NZ Transport Agency

---

**From:** Annette Meates [s 9\(2\)\(a\)](#)  
**Sent:** Thursday, 3 April 2025 4:28 pm  
**To:** Adam Lawrence [s 9\(2\)\(a\)](#)  
**Subject:** FW: OC250294 Community Connect, Total Mobility and SuperGold concessions - funding sustainability - Briefing - Policy

Hi Adam a couple of points to note for possible inclusion in your response s 9(2)(a)

s 9(2)(ba)(ii)

Ngā mihi

Annette Meates (she/her)  
Principal Advisor – Demand Responsive Public Transport  
Te Toki Tūhono – Transport Services, Multimodal Integration

s 9(2)(a)

**Waka Kotahi NZ Transport Agency**  
44 Bowen Street  
Private Bag 6995, Wellington 6141, New Zealand  
[Connect with us on social media](#)



---

**From:** s 9(2)(a)  
**Sent:** Wednesday, 2 April 2025 11:05 pm  
**To:** Adam Lawrence s 9(2)(a)  
**Cc:** Annette Meates s 9(2)(a); Whitney Adam s 9(2)(a)  
**Subject:** RE: OC250294 Community Connect, Total Mobility and SuperGold concessions - funding sustainability - Briefing - Policy

Slightly updated version. The email below still holds.

---

**From:** s 9(2)(a)  
**Sent:** Wednesday, April 2, 2025 2:34 PM  
**To:** Adam Lawrence s 9(2)(a)  
**Cc:** Annette Meates s 9(2)(a); Whitney Adam s 9(2)(a)  
**Subject:** OC250294 Community Connect, Total Mobility and SuperGold concessions - funding sustainability - Briefing - Policy

Hi Adam I have highlighted bit that may require your attention in terms of data.

I have also started framing up the options in the table but have not really assessed them against all criteria. If you have any likely dollar figures or demand impacts data we could put alongside those options that would be helpful but not vital.

I might send a more up to day version later today as I complete the table and reorder information to get the flow better but if you read this one it should be fine

§ 9(2)

---

**MINISTRY OF TRANSPORT**

**Wellington (Head Office)** | Ground Floor, 3 Queens Wharf | PO Box 3175 | Wellington 6011 | NEW ZEALAND | Tel: +64 4 439 9000 |

**Auckland** | NZ Government Auckland Policy Office | Level 7, 167B Victoria Street West | PO Box 106238 | Auckland City | Auckland 1143 | NEW ZEALAND | Tel: +64 4 439 9000 |

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# Document 13

**From:** [Adam Lawrence](#)  
**To:** s 9(2)(a)  
**Cc:** [Whitney Adam](#); [Annette Meates](#)  
**Subject:** Total Mobility client assessment form  
**Date:** Tuesday, 8 April 2025 10:57:21 am  
**Attachments:** [image001.png](#)  
[image002.png](#)  
[2503\\_Total\\_Mobility\\_client\\_assessment\\_form.pdf](#)

---

s 9(2)(a)

Separate to our current focus on the costs and funding, we previously discussed the Total Mobility client assessments. I thought would be useful to share the current questions asked when client assessments are undertaken. I am not sure how much of this information is available from current reporting systems but if you let me know what information could be useful for you current policy considerations we can following up and see if this is available from current reporting.

(link for NZTA internal reference  [2503\\_Total\\_Mobility\\_client\\_assessment\\_form.pdf](#))

Ngā mihi  
Adam

## Adam Lawrence

**Lead Advisor Public Transport**

Transport Services

s 9(2)(a)

**Waka Kotahi NZ Transport Agency**  
Majestic Centre, Level 7, 100 Willis Street  
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## Total Mobility client assessment form

as at 31 March 2025

### Introduction

Policy guidelines for the Total Mobility scheme are provided here [Total mobility scheme: policy guide for local authorities – July 2023 edition](#). The eligibility requirements are currently assessed by PTAs and assessment agencies using the following assessment form.

### Assessment form

#### Assessor Declaration

- Assessment date:
- Assessor Name:
- Name of agency:

#### Client Details

- First name(s):
- Surname:
- Preferred contact method: (Telephone / Email)
- Date of birth:
- Address:
- Postal address:
- Contact number:
- Email address:
- Client number:

#### Alternative Contact Details

- Contact name:
- Contact number:
- Relationship to client:
- Email:

#### Impairment Information

1. Which of the categories best describes the general nature of the applicant's impairment(s)?  
(Select as many as applicable)
  - Physical: Mobility, Physical
  - Intellectual: Fragile X, Down Syndrome, Prader Willi Syndrome, Dyslexia, Intellectual/learning other
  - Sensory: Hearing, Seeing, Sensory other
  - Mental health: Anxiety, Schizophrenia, Mental health other
  - Neurological: Epilepsy, Dementia, Stroke, Multiple Sclerosis, Parkinson's, Neurological other
  - Other conditions: Arthritis, Cardiac, Respiratory, Other
2. What is the primary cause of the applicant's impairment? (Select one)

- Congenital (since birth)
- Due to an accident
- Degenerative
- Due to other disease or illness
- Multiple

3. Eligibility Length: (Permanent / Temporary)

- Date of review:

4. Additional Information (Optional): (Please provide relevant information about the applicant's impairment)

**Eligibility Information**

5. Can the applicant do the following independently in a safe and dignified manner?

- Get to and from the nearest public transport stop or station without assistance (Able / Unable)
- Stand and wait without assistance for public transport (where there is no seat) (Able / Unable)
- Get on or off public transport without assistance (Able / Unable)
- Handle money or tickets without assistance (Able / Unable)
- Travel securely on public transport without assistance (Able / Unable)
- Travel on public transport without getting confused or anxious (Able / Unable)

6. Does the applicant use any of the following mobility aids?

- Manual wheelchair (Yes / No / Sometimes)
- Electric wheelchair (Yes / No / Sometimes)
- Scooter (Yes / No / Sometimes)
- Walking frame (Yes / No / Sometimes)
- Walking stick (Yes / No / Sometimes)
- Guide dog (Yes / No / Sometimes)
- Travel buddy (Yes / No / Sometimes)
- Crutches (Yes / No / Sometimes)
- Other (Please specify)

7. Does the applicant require the use of a wheelchair accessible vehicle to travel? (Yes / No)

**Government Funding**

8. Is the applicant in full-time dependent care funded by the Government health system? (Yes / No)

**Transport Related Financial Assistance**

9. Transport related financial assistance details:

- ACC (Yes / No) Please specify
- WINZ (Yes / No) Please specify
- Workbridge (Yes / No) Please specify
- Other (Yes / No) Please specify

**Trip Estimator Calculator**

10. Trip estimate of one-way trips: (table)

- Trip reason: (multiple rows)
- Frequency: (Weekly / Fortnightly / Monthly)
- Trip count:

- Monthly trip count:
- Monthly total:

11. Has the applicant previously used the total mobility scheme in any PTA? (Yes / No) Please specify

**Personal Information**

12. Gender: (Male / Female / Gender Diverse / Prefer not to say)

13. Age: (0-16 years / 17-29 years / 30-64 years / 65 years or over)

14. Ethnicity: (New Zealand European / New Zealand Māori / Pacific Peoples / Other European / Asian / Middle Eastern / Latin American / African / Prefer not to say / Other (please specify))

15. Income Source: (In full-time paid work / In part-time paid work / A super-annuitant / Undertaking voluntary work / A student (specify level) / A beneficiary / Other (please specify))

**Declaration**

- I hereby confirm that the above details are correct. I declare that I have read, or had read to me, and understand the enclosed applicant declaration and conditions of use for the Total Mobility scheme and agree to abide by them.

**Upload client photo in Total Mobility system**

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## Document 14

**From:** [Adam Lawrence](#)  
**To:** [Whitney Adam](#)  
**Subject:** Total Mobility historic report  
**Date:** Friday, 20 September 2024 1:57:36 pm  
**Attachments:** [image001.png](#)  
[LPA Apr13 Total Mobility recommendations report.pdf](#)

---

Hi Whitney,

The attached report was prepared for NZTA around ten years ago, and has a lot of background information.

Please note this is dated and not official policy, provided as context FYI only.

Ngā mihi  
Adam

### Adam Lawrence

**Lead Advisor Public Transport**  
Transport Services

s 9(2)(a)

**Waka Kotahi NZ Transport Agency**  
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**Total Mobility Scheme:  
Recommendations for review**

2 April 2013

**Lawrence Planning Associates Ltd**

Prepared by Adam Lawrence for the NZ Transport Agency

adam@lawrenceplanning.co.nz

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# Contents

<b>1</b>	<b>Recommendations</b>	<b>5</b>
<b>2</b>	<b>Introduction</b>	<b>9</b>
2.1	Purpose of review and scope	9
2.2	Information limitations	9
<b>3</b>	<b>Background</b>	<b>10</b>
3.1	History of the scheme	10
3.2	Current guidance	11
3.2.1	Ministry of Transport 2005 review	11
3.2.2	A guide for local authorities 2008	13
3.2.3	Procurement manual 2009	13
3.2.4	Guidelines for the development of regional public transport plans	14
<b>4</b>	<b>Moving on from the 2005 review</b>	<b>15</b>
4.1	Problem definition	15
4.2	Current issues	15
4.3	Changes to guidance	16
<b>5</b>	<b>Review of scheme components</b>	<b>18</b>
5.1	Purpose	18
5.2	Eligibility	18
5.3	Entitlement	19
5.3.1	Maximum subsidised fare	21
5.4	Assessment services	23
5.5	Transport providers	24
5.5.1	Entry of new service providers into the Total Mobility Scheme	25
5.5.2	Private hire and volunteer organisations	26
5.5.3	Charging fares for Total Mobility	28
5.5.4	Commercial viability of wheelchair hoist vehicles	29
5.6	Administration and monitoring	31
5.6.1	Quarterly and annual achievement reports	32
5.6.2	Annual customer satisfaction surveys	34
<b>6</b>	<b>References</b>	<b>36</b>
	<b>Appendix A Maximum fares and key factor data</b>	<b>37</b>
	<b>Appendix B Possible approaches to transport provider fare setting</b>	<b>38</b>
	<b>Appendix C Disability Action Plan</b>	<b>39</b>
	<b>Appendix D Summary of transport assistance available to people with disabilities</b>	<b>41</b>
D1	Quick reference guide	41
D2	Assistance available	43
	<b>Appendix E Total Mobility sections from the guidelines for the development of regional public transport plans</b>	<b>50</b>

**Appendix F Contract and terms and conditions from Greater Wellington Regional Council..... 52**

F1 Client terms and conditions (March 2013)..... 52

F2 Driver terms and conditions (March 2013) ..... 56

F3 Transport operator standard contract (March 2013)..... 63

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# 1 Recommendations

The following table provides a summary of recommendations made in this report.

**Table 1.1 Summary of report recommendations**

Component	Recommendations
Moving on from the 2005 review	<ol style="list-style-type: none"> <li>1. The scheme components and recommendations from the 2005 review remain largely relevant to the continued operation of the Total Mobility scheme.</li> <li>2. Developed a single set out policy guidelines for Total Mobility to include in updated RTPP guidelines. Update the Procurement Manual to provide specific guidance on the procurement and contracting of transport providers and assessment agencies.</li> </ol>
Purpose	<ol style="list-style-type: none"> <li>3. Retain existing purpose and clarify existing guidelines by removing reference to phases in 2005 review.</li> </ol>
Eligibility	<ol style="list-style-type: none"> <li>4. Clarify existing guidelines by removing reference to phases in 2005 review.</li> <li>5. Investigate with regions and provide in further clarification on eligibility of children in updated guidelines as part of the RTPP as necessary.</li> <li>6. Continuing to support extended coverage of the scheme where regional councils want to extend services but remove policies that encourage expansion of the scheme.</li> <li>7. Provide guidance that people living in areas without public transport should still be given access to the scheme for when they travel to places that do have the scheme.</li> <li>8. Develop standard client terms and conditions. Greater Wellington Regional Council's client terms and conditions are potentially a good starting point.</li> </ol>
Entitlement	<ol style="list-style-type: none"> <li>9. Retain requirement for standard 50% subsidy (subject to maximum fare).</li> <li>10. Clarify guidance on use of scheme by self-employed person, with trip purpose section.</li> <li>11. Consider allocation criteria (including potential for dynamic changes in maximum fares) in context of the implementation of a smart-card based national administration system.</li> <li>12. Provide information on the range of transport assistance available to people with disabilities for use by regional Total Mobility coordinators and assessment agencies.</li> <li>13. Provide clearer guidance on group travel, including in standard client terms and conditions.</li> <li>14. Consider allowing use of public transport by Total Mobility users but without the Total Mobility discount as a lower cost option for both users and councils. Consider opportunities arising from implementation of the national administration system to report on public transport usage of public transport services.</li> </ol>

	<p>15. Consider the introduction of a nationally consistent, regionally branded, photo identified card for all clients. Consideration should be given to rolling this out in conjunction with the introduction of the national administrative system.</p> <p>16. Travel should continue to be reimbursed by region in which it occurs, including because maximum fare subsidies are based on cost of travel in that local area.</p> <p><b>Maximum subsidised fare</b></p> <p>17. Clarify maximum fare guidance, including that regional councils when carrying out three-yearly review provide the results of that review to the NZTA.</p> <p>18. The method for calculation of maximum fares should be simplified with consideration given to a more principles based approach (e.g. based on consideration on size of town and cost of travel to town centre and/or community facilities).</p>
Assessment services	<p>19. A full contract template should be prepared by the NZTA for regions to use as basis of contracts with assessment agencies and agency assessors</p> <p>20. Regions should not be required to contribute to assessment agency costs but could do so if necessary to procure services. This would be a matter that should be covered in the procurement manual.</p> <p>21. Revised and simplify the handbook for agency assessors and consider providing as a standalone document for assessors to use.</p> <p>22. Consideration should be given to requiring each region to provide a low cost option for access to the Total Mobility scheme, taking account full costs including costs of a photo, photo identification card, and any assessment fees.</p>
Transport providers	<p>23. A full contract template should be prepared by the NZTA for regions to use as basis of contracts with transport providers. Terms and conditions for drivers should also be prepared. These could be based on the GW documents in Appendix F3 and Appendix F2.</p> <p><b>Entry of new providers into the Total Mobility scheme</b></p> <p>24. The procurement manual should be updated to include a principles for entry of new providers into the Total Mobility scheme.</p> <p>25. The entry of new service providers should be encouraged, especially where this is a lack of coverage by existing service providers. In areas not serviced by taxis, private hire and volunteer organisations may be the most efficient way of providing coverage and should be actively encouraged, with financial incentives as necessary (refer section 5.5.2)</p> <p><b>Private hire and volunteer organisations</b></p> <p>26. Provide clear guidance for private hire and volunteer organisation service providers, including options for how fares should be charged.</p> <p>27. The introduction of the national administration system will provide detailed information on fares across the country and should be used as a basis to benchmark private hire (and voluntary organisation) fares against.</p> <p>28. Options using the company dispatch and fare zones be considered as appropriate way of dealing with private hire. It is not considered appropriate or necessary to provide dispensation for meter equivalents in private hire vehicles.</p>

	<p>29. The rules around voluntary organisations should also be reviewed, but this may require a wider consideration of regulations as not being able to pay the driver creates some difficulty. It is considered that voluntary organisations would be an ideal way of providing services in areas not viable for other companies but some form of payment might be appropriate.</p> <p><b>Charging fares for Total Mobility</b></p> <p>30. The procurement manual should be updated to include principles for how fares are charged (and other guidance).</p> <p>31. The sustainability of transport operators is primarily an issue in areas where it is difficult to maintain a taxi or other service rather than bigger centres. In these areas there may be more appropriate delivery models such as supporting voluntary organisations, although the issue of voluntary organisations not charging fares may need to be addressed.</p> <p><b>Commercial viability of wheelchair hoist vehicles</b></p> <p>32. Existing policy and payment should be retained for wheelchair hoist vehicles.</p> <p>33. Consider making full hoist fee available to volunteer organisations, as they contribute to coverage of the scheme in areas not viable commercially and this would provide incentive for those vehicles to be available.</p> <p>34. Consider reviewing the regulations around payments to volunteer organisations.</p> <p>35. Further work is required to determine whether or not wheelchair hoist payments are achieving their goal.</p>
<p>Administration and monitoring</p>	<p>36. Investigate range of opportunities to tie policy changes to the implementation of the new national administration system.</p> <p>37. The issues of indirect and direct cost shifting from other government agencies should be considered as a separate review work stream.</p> <p>38. The NZTA should develop clear requirements and recommended processes for the detection of fraud by regions. Regions should be required to report this through to NZTA.</p> <p>39. The national administration system will greatly increase the ability to detect fraud and this should be a requirement for all regions or they should be required to provide their own equivalent level of fraud detection.</p> <p><b>Quarterly and annual achievement reports</b></p> <p>40. The national administration system would be used to meet quarterly and annual reporting requirements and that NZTA should run these reports directly on the system. Those regions without the national administration system would be required to submit information to NZTA in the same format as the NZTA reports in the national administration system reports</p> <p>41. NZTA should ensure that the national administration system is specified to collect all the information required above and to include standard reports that NZTA can run.</p> <p>42. Update policies and guidelines to reflect new data and reporting requirements arising from national administration system.</p>

	<p><b>Annual customer satisfaction surveys</b></p> <p>43. Replace existing regional surveys with a national customer satisfaction monitor as proposed by the NZTA.</p> <p>44. The national administration system should be used as the source for client and address details but the survey should be carried out independently of the system.</p> <p>45. The frequency and timing of national surveys should be discussed with regions, including how the information might be expected to be used by regions.</p>
--	---

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## 2 Introduction

### 2.1 Purpose of review and scope

The purpose of the review is to identify issues and make recommendations to improve the consistency, efficiency and effectiveness of the Total Mobility Scheme.

This report focuses on identifying areas for further review that would improve national consistency and improve value for money outcomes in the procurement of services. This report also considers opportunities arising from the implementation of a national total mobility administrative system being developed by NZTA on behalf of regional councils.

The original scope of services was to: a) Consider TM policy issues identified by NZTA to improve consistency in regional implementation of TM and to investigate and recommend an NZTA approach, and b) Review chapter 9 of the procurement manual, make recommendations for amendments to clarify TM policy and concessionary top up payments policy and to remove references to SuperGold. This report is much more limited in scope and focuses on identifying recommendations, as a basis for further work to confirm their appropriateness.

The Ministry of Transport review in 2005 needs to be updated the continued relevance of the implementation phases considered further.

### 2.2 Information limitations

This review was a desktop review based on information provided by NZTA and in the public domain. Greater Wellington Regional Council also provided some information.

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## 3 Background

### 3.1 History of the scheme

The Total Mobility Scheme was initiated by the Disabled Persons Assembly in the 1980s as a ‘grass routes’ initiative<sup>1</sup>. The *Total Mobility Scheme – A guide for local authorities* (2008) describes the scheme as follows:

*“The Total Mobility scheme provides a subsidised taxi service to people with serious mobility constraints by way of taxi vouchers that provide a discount of 50 percent off the normal taxi fare. It also provides funding to help purchase and install wheelchair hoists in taxi vans. The scheme is funded in partnership by local and central government. Local government (usually regional councils) manage and operate the scheme in most regions.”*

The Total Mobility Scheme has developed differently in the various regions and in 2004/05 the Ministry of Transport completed a comprehensive review of the scheme to improve the adequacy, consistency, portability, sustainability and coverage of the scheme<sup>2</sup>. The subsequent focus of NZTA (and its predecessor organisations) work on the Total Mobility Scheme has been the facilitation of regional council adoption of the two phases of improvements set out in the Ministry of Transport review (refer section 3.2).

The outcome of improving the national consistency of the Total Mobility Scheme has yet to be achieved despite seven years of implementation since the review. All but three regional councils are now signed up to both phases of the review but there is still variation in scheme rules and the level of assistance provided across regions, with some regions having comparatively generous schemes and others applying extra rules and rationing techniques to remain with budgets. There is also variation in the rules and requirements for transport providers to gain access to the scheme<sup>3</sup> and varying responses to the detection and management of fraud. While some regional variation is expected the current extent of variations means that nationally it is unclear as to whether regions and NZTA are receiving value for money from their investment in the Total Mobility Scheme.

Current NZTA guidance includes the *Total Mobility Scheme – A guide for local authorities* (2008) and the *Procurement Manual* (2009). The local authority guide focuses on requirements for each of the two phases of improvements identified in the Ministry of Transport review. It also includes templates for transport provider and assessment facilitator contracts and a “handbook for assessment facilitators” that includes an application form and explanation of client eligibility criteria. The *Procurement Manual* provides very limited guidance applicable to the Total Mobility Scheme. Further detail on current guidance is provided in section 3.2.

The NZTA has recently, as part of a government cross-agency Disability Action Plan (refer Appendix C), taken an opportunity to review their work on the Total Mobility Scheme to:

- a) Improve national consistent within the scheme for the benefit of passengers

<sup>1</sup> The bulk of material in this section is sourced from an NZTA memo “Update of Total Mobility and cross government work on the Disability Action Plan” dated 26 September 2012.

<sup>2</sup> Transfund New Zealand (now NZTA) also undertook an initial review of the scheme in 2002/2003 as part of the Passenger Transport Social Services Review. Further background information is provide in the Ministry of Transport review document (2005).

<sup>3</sup> An example of regional variation is that some regions limit transport provider access to registered taxi companies, whereas other regions allow private hire vehicles.

- b) Begin scoping longer term work to clarify transport assistance for people with disabilities provided across government so assistance is more personal centred and flexible rather than administratively organised.

The NZTA has also now begun developing a national Total Mobility administration system that will be operated on behalf of regional councils. The national administration system will reduce the administrative burden on regions, improve fraud detection and provide much improved reporting for regional councils and the NZTA. The use of the national administrative system is currently optional for regions<sup>4</sup>.

## 3.2 Current guidance

### 3.2.1 Ministry of Transport 2005 review

The recommendations from the Ministry of Transport 2005 review are set out in Table 3.1. These remain the key guidance to the Total Mobility Scheme today.

The 2005 review was comprehensive and now all but three regions are signed up to the phase 1 and 2 recommendations, which are set out in the guide for local authorities (refer section 3.2.2). The status of phase 3 is unclear.

Table 3.1 Recommendations from Ministry of Transport 2005 review of the Total Mobility Scheme

Scheme Component	Review recommendations	Phase
Purpose	a) That the following Total Mobility Scheme purpose statement is nationally agreed and applied <i>"The Total Mobility Scheme is to assist eligible people with impairments to access appropriate transport to enhance their community participation. This assistance is provided in the form of subsidised door-to-door transport services wherever Scheme transport providers operate."</i>	Phase 1
	b) That the founding central tenet of the Total Mobility Scheme, and the role of local authorities in providing the Scheme, is supported and strengthened.	Phase 1
	c) That the Total Mobility Scheme parameters are clearly defined.	Phase 1
Eligibility	d) That the following Total Mobility Scheme eligibility criteria are nationally agreed and applied. <i>"An eligible person must have an impairment that prevents them from undertaking any one or more of the following five components of a journey unaccompanied, on a bus, train or ferry in a safe and dignified manner:</i> <ul style="list-style-type: none"> <li>· Getting to the place from where the transport departs</li> <li>· Getting on to the transport</li> <li>· Riding securely</li> <li>· Getting off the transport</li> <li>· Getting to the destination."</li></ul>	Phase 1
	e) That people with impairments who meet the criteria for the Total Mobility Scheme, and are able to use bus, train or ferry services some of the time, but not all of the time, should be eligible for the Scheme.	Phase 1
	f) That people who meet the criteria for the Total Mobility Scheme and have an impairment that has lasted or is expected to last for six months or more should	Phase 1

<sup>4</sup> Greater Wellington Regional Council have implemented their own regional "Total Mobility Electronic System" supplied by Snapper that is similar in concept to how the national administrative system is intended to operate. Greater Wellington Regional Council still has a number of years to run on its contract with Snapper.

	<p>[excluding terminal illness] be eligible for the Scheme.</p> <p>g) That children with impairments who meet the criteria for the Total Mobility Scheme should be eligible for the Scheme.</p> <p>h) That people with impairments who meet the criteria for the Total Mobility Scheme and live in residential care should be eligible for the Scheme.</p> <p>i) That people with impairments who meet the criteria for the Total Mobility Scheme, and who live in areas that do not have bus, train or ferry services should be eligible for the Scheme, enabling them to use the Scheme wherever it operates.</p>	<p>Phase 1</p> <p>Phase 1</p> <p><b>Phase 3</b></p>
Entitlement	<p>j) That the fare subsidy for the Total Mobility Scheme should be nationally consistent and standardised at 50%.</p> <p>k) That the Total Mobility Scheme has no minimum fare threshold.</p> <p>l) That local authorities determine maximum subsidised fares for the Total Mobility Scheme in negotiation with Land Transport NZ, taking into account the NZ Travel Survey, and review them annually.</p> <p>m) That town boundary travel restrictions for the Total Mobility Scheme be removed and replaced with a maximum subsidised fare.</p> <p>n) That the number of allocated subsidised trips for the Total Mobility Scheme take into account the self-assessed needs of individual Scheme members, and be adjusted by local authorities to manage their budgets, and negotiated with Land Transport NZ.</p> <p>o) That there are no restrictions on the purpose of the trip for the Total Mobility Scheme.</p>	<p>Phase 1</p> <p>Phase 1</p> <p>Phase 2</p> <p>Phase 2</p> <p>Phase 2</p> <p>Phase 1</p>
Assessment services	<p>p) That Land Transport NZ develop guidelines for contracts between local authorities and assessment agencies to ensure high quality and consistent assessments.</p> <p>q) That local authorities enter into contracts with assessment agencies, aligned with the guidelines produced by Land Transport NZ.</p> <p>r) That local authorities should make a financial contribution towards the cost of assessments and administration undertaken by assessment agencies.</p> <p>s) That appropriate training is provided to assessors to assist in the consistent application of the eligibility criteria.</p> <p>t) That a handbook, including best practice guidelines, be developed and published by Land Transport NZ in conjunction with local authorities, to help assessors in consistently applying the eligibility criteria.</p> <p>u) That the assessment process assists Total Mobility Scheme members estimate how many trips they would use (self assessed needs). This information will be provided to local authorities to assist them determine the appropriate number of allocated subsidised trips.</p> <p>v) That potential members of the Total Mobility Scheme are not required to become financial members of an assessment agency in order to have an assessment for the Scheme, although they may be asked to pay an application fee. The appropriate amount of any such fee should be negotiated between Land Transport NZ, local authorities and assessment agencies.</p> <p>w) That potential members of the Scheme have the option to be assessed by a voluntary disability sector agency in every region.</p>	<p>Phase 2</p>
Administration	<p>x) That Land Transport NZ encourages local authorities to establish systems for data collection, monitoring and evaluation.</p> <p>y) That Land Transport NZ encourages local authorities to improve their administrative systems for the allocation and redemption of trip entitlement vouchers.</p> <p>z) That local authorities implement appropriate methods to promote the Total Mobility Scheme. This should be phased in following the implementation of other</p>	<p>Phase 2</p> <p>Phase 2</p> <p><b>Phase 3</b></p>

	improvements to the Scheme.	
Transport operators	aa) That Land Transport NZ develops guidelines for contracts between local authorities and Total Mobility Scheme transport operators to ensure high quality and adequate service levels, including the provision of wheelchair accessible taxis within the fleets.	Phase 2
	bb) That local authorities enter into contracts with transport operators, aligned with the guidelines produced by Land Transport NZ.	Phase 2
	cc) That Land Transport NZ encourages adequate provision of wheelchair accessible taxis by providing a flat payment (in addition to the fare) to the transport operator for each trip taken by a Total Mobility Scheme member using a wheelchair hoist.	Phase 2
	dd) That Land Transport NZ investigates the establishment of an appropriate regime to ensure that wheelchair hoists meet acceptable safety standards.	Phase 2
	ee) That local authorities are encouraged to investigate the possibility of contracting taxi services operating in areas that are not currently covered by the Total Mobility Scheme, to provide a Scheme service.	Phase 2
	ff) That the possibility of other types of transport providers participating in the Total Mobility Scheme is investigated.	Phase 2
Funding and implementation	The review recommended (recommendations gg), hh), and ii) three implementation phases as set out in the right hand column of this table. This phases included financial incentives for regions signing up to these improvements.	

### 3.2.2 A guide for local authorities 2008

The *Total Mobility Scheme - A guide for local authorities* (2008) was developed to help implement the Ministry of Transport's 2005 review. The purpose of the guide is set out below:

*This guide outlines the improvements that resulted from the Ministry of Transport's 2005 review, offers explanatory notes for each improvement to help local authorities implement the improvements and provides templates to be used when creating/updating contracts with Total Mobility scheme providers, along regional with a training manual for Total Mobility assessment facilitators.*

The guide is structured around and explains the phase 1 and 2 requirements set out in the 2005 review recommendations. The guide appendices provide additional information, including the total Mobility application form and "*Handbook for assessment facilitators*". The guidelines also include draft contracts and guidelines for transport providers and assessment agencies although the contacts require further work to be suitable. Greater Wellington Regional Council found that contracts had to be updated to enable implementation of their *Total Mobility Electronic System* in 2010<sup>5</sup>.

The guide for local authorities has not been updated for some time.

### 3.2.3 Procurement manual 2009

The NZTA *Procurement manual* (2009) sets out the procedures that regional councils must follow when procuring services funded by the NZTA<sup>6</sup>.

The NZTA Procurement Manual provides guidance and rules about the procurement (purchasing) of all services that receive funding from the national land transport fund. Approval of procurement procedures is part of the NZTA's statutory functions under the Land Transport Management Act 2003

<sup>5</sup> Reference to contract updates provided in Greater Wellington Regional Council Report "Introduction of the Total Mobility Electronic System and implementation of other improvements" ([http://www.gw.govt.nz/assets/council-reports/Report\\_PDFs/2010\\_472\\_1\\_Report.pdf](http://www.gw.govt.nz/assets/council-reports/Report_PDFs/2010_472_1_Report.pdf)).

<sup>6</sup> A detailed review of the procurement requirements has not been undertaken as part of this review.

(LTMA)<sup>7</sup>. The current manual provides very limited guidance for the procurement of Total Mobility transport services and hoist vehicles and no specific guidance for assessment agencies (who at this time are generally not paid).

The main relevant sections of the Procurement manual are:

- *Strategic approach to procurement* (Chapter 4.0) provides high level requirements but nothing specific to Total Mobility.
- *Procurement procedure 4 – Public transport fare subsidy schemes* (Chapter 9.0) which applies to the Total Mobility scheme, including wheelchair hoists. This chapter groups Total Mobility in with the concessionary fare scheme and SuperGold card payments which are unrelated.
- *Appendix A Procurement strategy checklist* is relevant but includes nothing specific to Total Mobility.

Regional councils are able to take different approaches from those set out but these need to be described in their procurement strategy or discussed with NZTA. Alternative procedures need to be approved by the NZTA, who will consider whether they are value for money as defined in section 25 of the LTMA. The lack of guidance in the current manual essentially requires regional councils to consider their approach separately from other regions, for example, chapter 4.0 specifically addresses Total Mobility but does not have any practical guidance, other than a reference to the guidelines for local authorities (discussed in section 3.2.2). Matters such as access by private hire and voluntary transport providers are not covered.

### 3.2.4 Guidelines for the development of regional public transport plans

NZTA's *Guidelines of the development of regional public transport plans* (2011) set out the requirements for regions when preparing a regional public transport plan (RPTP).

The RPTP must include a description of the public transport services (including shuttle bus and Total Mobility services) and how these services will assist the transport disadvantaged. It must also include relevant Total Mobility policies. The guidelines set out the description of service requirements for Total Mobility as follows (section 5.1):

*The level of detail provided about Total Mobility will need to be considered to give a clear idea of what is intended, but provide sufficient flexibility. As a minimum the RPTP should state the areas of operation, any exemptions to 24 hour operation, eligibility criteria (as described in the Ministry of Transport Total Mobility Review) and discount levels available for total mobility schemes or any other subsidised taxi and shuttle based services. NZTA recommends that included here is a statement about how and when the recommendations of the Ministry of Transport Total Mobility Review have or will be implemented.*

The guidelines under assistance for transport disadvantaged (section 5.2) provides a brief summary of eligibility requirements. The guidelines under public transport service policies – national Total Mobility policy (section 5.4.2) also identify some of the requirements for transport providers, including access provisions and the need to review maximum fares. Both sections refers the reader referred to the guidelines for local authorities (refer section 3.2.2).

The Total Mobility requirements in the guidelines are set out in Appendix Z.

<sup>7</sup> Refer NZTA note "Total Mobility providers and fares"

## 4 Moving on from the 2005 review

The Ministry of Transport review in 2005 was the last comprehensive review of the Total Mobility Scheme and the implementation of its recommendations has since been the focus on the NZTA and regional councils.

### 4.1 Problem definition

The problem includes:

- Lack of regional consistency in eligibility criteria and transport provider entry
- Poor data reporting
- Poor fraud detection
- Lack of assurance that value for money

### 4.2 Current issues

A number of current issues have been identified by NZTA as set out in Table 4.1 and Table 4.2. Table 4.1 sets out issues that the NZTA is intending to focus on in the near future to improve the efficiency, effectiveness and consistency of the Total Mobility Scheme<sup>8</sup>. A number of other issues have also been identified by regional council Total Mobility coordinators as set out in Table 4.2 but are not an immediate focus for the NZTA<sup>9</sup>.

These outstanding issues are considered further below (section 5), along with any further issues identified as part of this review.

**Table 4.1 Issues identified by NZTA to focus on in the near future**

NZTA identified issue	Description
1) Principles based approach (to setting of fares)	Develop a principles based approach to how fares for Total Mobility are set including a formula for reviewing maximum fares and principles for how fares will be charged for and set with the onus on regions to provide value for money justifications in their procurement strategies. This will address the issue where in some regions maximum fares have not changed in seven years despite increases in the cost of taxi travel.
2) Requirements for transport provider access to scheme	Provide guidance on entry of new transport providers, including volunteer providers to the scheme. Currently some regions are reluctant to accept new providers, particularly private hire services as it is hard to ensure fares are appropriate without taxi meters. The rules around volunteer providers are also unclear and admission to the scheme currently requires specific NZTA approval. As a result a number of towns where taxis are not financially viable do not have Total Mobility services.
3) Information on range of transport assistance available to people with	Provide information on the range of transport assistance available to people with disabilities for use by regional Total Mobility coordinators and assessment agencies.

<sup>8</sup> Refer NZTA memo "Update of Total Mobility and cross government work on the Disability Action Plan" dated 26 September 2012. Regional Total Mobility coordinators had an input into the identification and prioritisation process for these issues (refer appendix one of memo), but the final work programme has been determined by NZTA, taking into consideration wider factors.

<sup>9</sup> Ibid.

disabilities	
4) Low cost assessment options for clients in all regions	Investigate ways to increase the availability of low cost assessment options for clients in all regions. Currently it can cost more than \$80 to be assessed and gain access to the scheme in some regions, this can be a barrier to potential passengers as many are on low fixed incomes. One of the 2005 review phase two recommendations was to have free or low cost options available.
5) Improved monitoring	Improve Total Mobility monitoring practices to support decision-making and to align with wider changes to public transport monitoring.
6) Development of a national administration system	Investigate, develop and implement a national Total Mobility Administration system in partnership with and on behalf of regional councils.

Table 4.2 Other issues identified by regional council Total Mobility coordinators

Issue
7) Inconsistencies in regional application of scheme
8) Guidance on access to scheme for non-ATO transport providers
9) Adequate contract guidance
10) Maximum subsidised fares
11) Transport providers imposing additional fare conditions
12) Guidance on requirements for wheelchair hoists and other mobility devices
13) Why non-commercial transport providers are not eligible for wheelchair hoist payments
14) Wheelchair hoist payments achieving their goal
15) Requirement for low cost (to client) assessment options
16) Guidance on payments to assessment agencies for client assessments
17) Guidance on Group travel (organised trips)
18) Guidance on use of scheme by self-employed people
19) Guidance on eligibility of children
20) Out of town travel by clients
21) Direct cost shifting from other government agencies
22) Indirect cost shifting
23) Fraud policy

### 4.3 Changes to guidance

The *Total Mobility Scheme - A guide for local authorities* is structured around the recommendations of the Ministry of Transport's 2005 review. The phased delivery of this review is now substantially complete providing an opportunity to update these guidelines with a simple statement of policy requirements and guidelines (i.e. not structured around the phases) applicable to all regions.

It is recommended that this updated guidelines be incorporated in the RPTP guidelines for regional councils with close links to an updated Procurement Manual. The RPTP guidelines should ideally provide a one-stop-shop on Total Mobility policy, supported by an updated Procurement Manual focusing on specific procurement requirements (e.g. contracting with transport providers and assessment agencies, entry of new transport providers, and setting of fares). This would provide regional councils will a single set of integrated requirements. The RPTP guidelines are currently being

updated for PTOM and the implementation of a national administrative system provide an ideal opportunity for this.

The scheme components and recommendations from the 2005 review have been used as the structure for this current review, as set out in section 5.

**Recommendations:**

1. The scheme components and recommendations from the 2005 review remain largely relevant to the continued operation of the Total Mobility scheme.
2. Developed a single set out policy guidelines for Total Mobility to include in updated RTPP guidelines. Update the Procurement Manual to provide specific guidance on the procurement and contracting of transport providers and assessment agencies.

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## 5 Review of scheme components

The Total Mobility Scheme components identified in the 2005 Ministry of Transport review have been used as a basic structure for this report.

### 5.1 Purpose

The following table provides a summary of eligibility considerations that have been considered.

Table 5.1 Purpose considerations

Area	Comments
Nationally agreed and applied purpose	A nationally agreed and applied purpose and parameters for the Total Mobility Scheme are set out in <i>Total Mobility Scheme: A guide for local authorities</i> in accordance with the recommendations of the 2005 review.

#### Recommendations:

3. Retain existing purpose and clarify existing guidelines by removing reference to phases in 2005 review.

### 5.2 Eligibility

The following table provides a summary of eligibility considerations that have been considered.

Table 5.2 Eligibility considerations

Area	Comments
General eligibility criteria	<i>Eligibility criteria as set out in section 4.4 of Total Mobility scheme: A guide for local authorities are relatively clear.</i> While there may be some room for interpretation, core eligibility criteria are well established and set out in the <i>Total Mobility Scheme – A guide for local authorities</i> . The criteria are considered appropriate to apply to all regions, irrespective of which phase of the 2005 review they have signed up for.
Eligibility and fluctuating need	Eligibility and fluctuating need criteria as set out in section 4.5 of <i>Total Mobility scheme: A guide for local authorities</i> are relatively clear.
Eligibility and duration of impairment	Eligibility and duration of impairment criteria as set out in section 4.6 of <i>Total Mobility scheme: A guide for local authorities</i> are relatively clear.
Eligibility of children	Children are eligible for Total Mobility as set out in section 4.7 of <i>Total Mobility scheme: A guide for local authorities</i> . These guidelines are relatively clear but regions have identified that further guidance would be helpful (issue 19). The need for further guidance is likely linked to determine whether there is other assistance available that (e.g. from MoE).
Eligibility of people in residential care	People in residential care are eligible for Total Mobility as set out in section 4.8 of <i>Total Mobility scheme: A guide for local authorities</i> . It is noted that rest homes should not be permitted to access their residents' eligibility due to conflicting incentives (e.g. there may be an incentive to approve clients so that the rest home can save its own transport funds).

<p>Extending the Total Mobility area</p>	<p>Regions are currently encouraged to extend coverage of the Total Mobility scheme, as set out in section 6.10 of <i>Total Mobility scheme: A guide for local authorities</i>. This is part of phase 2 (or 3) of the 2005 reviews. NZTA should consider continuing to support extended coverage of the scheme where regional councils want to extend services but remove policies that encourage expansion of the scheme. This is because regions need to be able to determine whether they have sufficient budget to extend services. It is noted that the national administration system currently under development will provide much better reporting information so that informed decision can be made.</p> <p>However,</p>
<p>Eligibility of people living in areas without public transport</p>	<p>People living in areas without public transport should be eligible for the Total Mobility scheme, whether for not it is operating in their area. This is so that they are not discriminated against when they are travelling to areas that do have Total Mobility services.</p>
<p>Client terms and conditions</p>	<p>Clients should be required to agree that in using the scheme they agree to a standard set of terms and conditions. This should be tied into the introduction of the national administrative system, and greater use of technology and move away from paper documentation (including vouchers and potentially paper assessment forms with signatures).</p> <p>Greater Wellington Regional Council has developed a standard set of terms and conditions as set out in Appendix F1, which were found to be necessary with implementation of their Total Mobility Electronic System.</p>

**Recommendations:**

4. Clarify existing guidelines by removing reference to phases in 2005 review.
5. Investigate with regions and provide in further clarification on eligibility of children in updated guidelines as part of the RPTP as necessary.
6. Continuing to support extended coverage of the scheme where regional councils want to extend services but remove policies that encourage expansion of the scheme.
7. Provide guidance that people living in areas without public transport should still be given access to the scheme for when they travel to places that do have the scheme.
8. Develop standard client terms and conditions. Greater Wellington Regional Council's client terms and conditions are potentially a good starting point.

### 5.3 Entitlement

The following table provides a summary of entitlement considerations that have been considered. A number of these are considered further.

Table 5.3 Entitlement considerations

Area	Comments
<p>Standardised subsidy</p>	<p>The requirement for a standardised subsidy (i.e. 50%) is set out in section 4.8 of <i>Total Mobility scheme: A guide for local authorities</i> are relatively clear. Regions are not permitted to vary this subsidy amount, but can use allocation criteria to set trip limits or change the maximum subsidy, if necessary to balance their budgets (refer below). NB: There are no minimum fares, which appears to have been an issue prior to 2005 review.</p>

Maximum subsidised fare	Section 6.1 of <i>Total Mobility scheme: A guide for local authorities</i> provides a methodology for setting maximum fares. This is discussed in section 5.3.1 below.
No town boundary restrictions	Section 6.2 of <i>Total Mobility scheme: A guide for local authorities</i> requires there to be no town boundary restrictions. This is considered an appropriate rule but consideration of the size of town and area serviced by the Total Mobility scheme should be a factor in setting maximum fares within in region (or towns within the region). Refer section 5.3.1 on maximum fare subsidies.
Allocation criteria / trip limits	Section 6.3 of <i>Total Mobility scheme: A guide for local authorities</i> sets out allocation criteria. The introduction of the smart-card based national administration system may make it more difficult to limit number of trips (because client likely to not find out if they hit their trip limit until asked to pay). There should however continue to be flexibility in each regions ability to manage it budgets through limiting its exposure. Consideration could be given to changing the maximum fare subsidy more dynamically in response to changing trip patterns based on information that would be readily available through the national administration system.
Purpose of trip	Section 4.11 of <i>Total Mobility scheme: A guide for local authorities</i> states that there is no restriction on trip purpose, except if is or should be subsidised by another government agency. This would allow for travel by self-employed persons, an area where further guidance has been sought by regional councils (issue 18).
Group travel	Group travel is allowed provided no other source of funding but regional councils have identified lack of guidance on this area.
Travel on public transport services	This is currently now allowed but this is a lower cost travel option for both client and regional council with average public transport fares significantly lower than average taxi fares (even with 50% discount). Suggest consideration be given to allowing use of public transport (as per Auckland) but without any discount. This could be monitored through national administration system and depending on usage patterns client eligibility could be reassessed (because if always using public transport then likely rather large chance that no longer meeting edibility criteria). This would also pick up where client circumstances change.
Cost shifting between government agencies	Information on the range of transport assistance available to people with disabilities would be useful for regional Total Mobility coordinators and assessment agencies. NZTA has compiled information as set out in Appendix D.
Out of town travel	A national consistent, regionally branded, photo identified card is recommended to be introduced. Introduction of a national photo card should coincide with the roll-out of the national administrative system or otherwise through regular card replacement. Regions still operating with vouchers should also require a photo identification card to use with vouchers. A nationally consistent card will mean that transport providers in different regions only have to deal with one card. Travel should continue to be reimbursed by region in which it occurs, including because maximum fare subsidies are based on cost of travel in that local area.

**Recommendations:**

9. Retain requirement for standard 50% subsidy (subject to maximum fare).
10. Clarify guidance on use of scheme by self-employed person, with trip purpose section.
11. Consider allocation criteria (including potential for dynamic changes in maximum fares) in context of the implementation of a smart-card based national administration system.
12. Provide information on the range of transport assistance available to people with disabilities for use by regional Total Mobility coordinators and assessment agencies.
13. Provide clearer guidance on group travel, including in standard client terms and conditions.
14. Consider allowing use of public transport by Total Mobility users but without the Total Mobility discount as a lower cost option for both users and councils. Consider opportunities arising from implementation of the national administration system to report on public transport usage of public transport services.
15. Consider the introduction of a nationally consistent, regionally branded, photo identified card for all clients. Consideration should be given to rolling this out in conjunction with the introduction of the national administrative system.
16. Travel should continue to be reimbursed by region in which it occurs, including because maximum fare subsidies are based on cost of travel in that local area.

5.3.1 Maximum subsidised fare

The requirements for setting maximum fare subsidies are set out in section 6.1 of *Total Mobility scheme: A guide for local authorities*. Maximum fares are set by regional councils taking account of available budget. NZTA has little transparency through to this process and cannot be sure maximum fares are reviewed every three years (as required), with many maximum fares having not changed for a number of years<sup>10</sup>. There is, however, some evidence that reviews have been undertaken (e.g. BoP and Horizons 2012 reviews).

NZTA have also indicated that there is a need for a clear and simple methodology for calculating maximum fare subsidies<sup>11</sup>. The NZTA note *Transport providers and fares* includes the following discussion regarding maximum fares:

*54. The maximum fare determines the total amount of subsidy available to the client for any single trip. Maximum fares in Zealand range from \$40 (50% of a maximum fares of \$80) to \$5 (50% of a maximum fare of \$10). While some variation in maximum fares is necessary to reflect different local circumstances, there is a marked difference in the maximum subsidised fare between some similar sized centres. For example, Feilding has a maximum fare subsidy of \$5 (50% of a \$10 fare), while Waimate has a maximum subsidy of \$30 (50% of a \$60 fare). The differences in maximum fares contributes to regional inequalities in the scheme.*

*55. Prior to the 2005 Total Mobility review, regional councils often also used the town boundary to restrict fares. The 2005 review recommended that town boundary restrictions be removed and recommended that maximum fares be set and that these be reviewed regularly. Regional councils that signed up to the Total Mobility phase two improvements agreed to review maximum fares every three years.*

<sup>10</sup> NZTA have noted that some maximum subsidised fares have not changed since the review seven years ago; and that this suggests that some regions may not have reviewed the maximum subsidised fare. NZTA consider this may in part be due to a lack of clear and simple guidance on how to review fares and how to set them at an appropriate level. Although there are also likely to be other factors influencing reviews.

<sup>11</sup> Refer NZTA note "Transport providers and fares"

56. While many regions have adjusted maximum fares, in other regions the maximum fare is still set at the same level as 2005. This is despite significant increases in the consumer price index and taxi fares, partially driven by higher fuel costs. See [Appendix A] for a table of current and 2005 maximum subsidised fares.

57. It is unclear whether in regions where the fares have not changed if the maximum fares have been reviewed and no change was required, or if there has not been a review. It is possible that some regions are reluctant to increase maximum fares due to budgetary constraints.

58. The Guide for Local Authorities sets out a proposed methodology for reviewing the maximum fares. However this methodology can be difficult to apply as it requires information on the average distance travelled in the region (as measured by the New Zealand Household Travel Survey) which may differ between the towns in the region. The methodology does not address congestion delays well.

59. In those regions that have reviewed maximum fares, it appears that different approaches have been used. Auckland used an economist to undertake an evaluation using a different methodology, suggesting that the recommended methodology was not suitable.

60. Ideally every regional council would use the same methodology that takes into consideration regional variations. One way of achieving this would be for NZTA or one of the larger regional councils to develop a simple model based on an agreed methodology that enables regions to simply enter some local data and produce a recommended maximum subsidised fare that could become part of the Procurement Manual tools.

61. This approach could result in increases in the maximum fares in some regions if existing maximum fares are too low. Potentially this could lead to cost increase if the maximum fares have not been covering 50% of the fare or have been suppressing demand.

62. Consequently the desire for a consistent methodology will need to be balanced against political and budgetary considerations. Regional councils could still adopt a maximum subsidised fare different from that produced with the agreed methodology provided they clearly and transparently state the rationale for the deviation from the agreed approach and get NZTA approval.

63. Such a methodology should take into account:

- Movement in the consumer price index
- Movement in taxi fares
- The average cost of Total Mobility trips
- The percentage of trips above the current maximum fare
- Feedback from scheme members and providers.

64. NZTA could develop a draft methodology and a simple model that could be supplied to regional councils to enable them to calculate the recommended maximum fare on a three yearly basis to align with the National Land Transport Programme process.

Also, refer section 5.5.3. The current guidelines, which require information from the New Zealand Household Travel Survey, adjusted for congestion if it occurs, appear to be rather difficult for many regions to apply and consideration should be given to simplifying the requirements. It is recommended that the focus be on simplifying the requirements and provide more 'principles based' guidance, as for many regions there probably isn't much benefit in going through complex calculations. For example, a principle might be that fares should be set to take into account the size of the town being serviced (e.g. distance from one side to the other) and likely cost of travel to the town centre and community facilities.

**Recommendations:**

17. Clarify maximum fare guidance, including that regional councils when carrying out three-yearly review provide the results of that review to the NZTA.
18. The method for calculation of maximum fares should be simplified with consideration given to a more principles based approach (e.g. based on consideration on size of town and cost of travel to town centre and/or community facilities).

## 5.4 Assessment services

The following table provides a summary of assessment services matters that have been considered.

Table 5.4 Assessment services considerations

Area	Comments
Contracts with assessment agencies	Regional councils identified this as an issue (Issue 9). Refer section 6.4 of <i>Total Mobility scheme: A guide for local authorities</i> . The current guidance is not adequate for full contract. Recommend that a full contract template be prepared by the NZTA for regions to use as basis of contracts with assessment agencies and agency assessors.
Regional council contribution to assessment agency costs	Regional councils identified lack of guidance as an issue (issue 16). It is recommended that regions not be required to contribute to assessment agency costs but could do so if necessary to procure services. This should be covered in the procurement manual.  NB: There is a cost to assessment agencies in the time taken to carry out assessments. But assessment agencies are also providing a service to their clients.
Handbook for assessment facilitators	Refer section 6.5 of <i>Total Mobility scheme: A guide for local authorities</i> . The current handbook is included in <i>Total Mobility scheme: A guide for local authorities</i> as an appendix. It is structured around the assessment form. It is recommended that these guidelines be reviewed and updated. The handbook should also be a standalone document for assessors to use.
Training for agency assessors	Refer Section 6.6 of <i>Total Mobility scheme: A guide for local authorities</i> .
Estimating client trips	This is included as part of the client assessment form and handbook for agency assessor.
Clients not required to become member of assessment agency	This 2005 review recommended that clients not be required to become a member of an assessment agency to be assessed. It did state that an application fee may be payable.
Low cost assessment options for clients in all regions	Regional councils identified lack of guidance as an issue (issue 4). The 2005 review recommended that clients have right to be assessed by a voluntary disability sector agency in every region. It is recommended that each region should be required to provide a low cost option for access to the Total Mobility scheme, taking account full costs including costs of a photo, photo identification card, and any assessment fees.  Currently it can cost more than \$80 to be assessed and gain access to the scheme in some regions, this can be a barrier to those on low fixed incomes.

**Recommendations:**

19. A full contract template should be prepared by the NZTA for regions to use as basis of contracts with assessment agencies and agency assessors
20. Regions should not be required to contribute to assessment agency costs but could do so if necessary to procure services. This would be a matter that should be covered in the procurement manual.
21. Revised and simplify the handbook for agency assessors and consider providing as a standalone document for assessors to use.
22. Consideration should be given to requiring each region to provide a low cost option for access to the Total Mobility scheme, taking account full costs including costs of a photo, photo identification card, and any assessment fees.

## 5.5 Transport providers

There is some variation in approach to managing transport providers across the region and differing approaches to, for example, determining entry criteria for new providers, charging of fares and determining maximum fare subsidies.

NZTA has indicated that it intends to clarify Total Mobility procurement procedures and to include principles and expectations for the procurement of Total Mobility services in an updated Procurement Manual<sup>12</sup>. This should also include adequate contract guidance, as discussed in section **Error! Reference source not found.**<sup>13</sup>.

This section considers various aspects of the transport provider component of the Total Mobility Scheme and sets out a number of recommendations. The following table provides a summary of transport provider matters that have been considered.

**Table 5.5 Transport provider considerations**

Area	Comments
Contracts with transport providers	Regional councils identified this as an issue (Issue 9). Refer section 6.4 of <i>Total Mobility scheme: A guide for local authorities</i> . The current guidance is not adequate for full contract. Recommend that a full contract template be prepared by the NZTA for regions to use as basis of contracts with assessment agencies and agency assessors.
Entry of new providers into the TM scheme	Refer section 5.5.1.
Private hire and volunteer organisations	Refer section 5.5.2.
Charging fares for Total Mobility	Refer section 5.5.3.
Commercial viability of wheelchair hoist vehicles	Refer section 5.5.4.

<sup>12</sup> Refer NZTA note "Total Mobility providers and fares".

<sup>13</sup> The approach to Total Mobility in each region must also be set out in the regional public transport plan as discussed in section 3.2.4.

**Recommendations:**

23. A full contract template should be prepared by the NZTA for regions to use as basis of contracts with transport providers. Terms and conditions for drivers should also be prepared. These could be based on the GW documents in Appendix F3 and Appendix F2.

5.5.1 Entry of new service providers into the Total Mobility Scheme

The NZTA note *Transport providers and fares* includes the following discussion regarding entry of new service providers:

**Problem statement**

8. Current NZTA guidance doesn't set out an explicit position on the entry of new taxi or private hire services into the scheme. NZTA policy does address voluntary services in the Guide for Local Authorities - these are currently only allowed to join with NZTA approval, which is considered on a case by case basis.

9. Regional councils have different approaches to the selection of new providers to the scheme. Some councils set rules that all providers must comply with to enter the scheme, for example, having at least one hoist vehicle. Some regions do not allow private hire services to become part of the scheme.

10. Providers, both taxi and private hire franchisees, are seeking a consistent policy on scheme entry as often they are operating in multiple regions and different requirements are a barrier to market entry.

**Discussion**

11. There is variation in regional council policies on the entry of new providers to the scheme. Some regions accept any provider who is willing to meet contract terms, others restrict it to only taxi providers or impose other requirements.

12. In many cases these rules may be justified. For example a rule requiring that all providers must have at least one wheelchair hoist vehicles might ensure that an adequate number of hoists are provided and that these are distributed fairly across companies.

13. However, these rules and the reasons behind them are not always explicit or stated in a public document. Some potential new entrants have expressed concerns that rules are not explicit and don't have clear justifications, some rules are perceived as barriers to entry.

**NZTA procurement requirements**

14. NZTA's current procurement position is that any provider able to meet the scheme criteria is able to join the scheme as long as they can deliver a value for money service. However, the NZTA Guide for local authorities requires specific NZTA approval before voluntary service providers can join the scheme.

15. From a client perspective it is better to maximize the number of potential providers. Some clients may be confused if some taxis are part of the scheme and others are not. Having a greater number of providers also increases the chance of finding a service that meets their needs and who they can trust. In practice this may not always work as many towns and cities have too few clients for it to be viable for multiple providers.

16. NZTA's proposed approach is to have some principles, or criteria, for entry into the scheme and any providers meeting these should be given the opportunity to join the scheme. This would remove the requirement for specific approval in relation to Voluntary providers. If they can deliver a value for money services they should be able to join the Total Mobility Scheme and may be the only providers in some areas.

17. Some suggested principles or criteria that could be included in the NZTA Procurement Manual for the entry of new providers to the Total Mobility scheme are:

- The service meets all the relevant legal and regulatory requirements (some guidance could be provided in chapter 9 of the Manual regarding what some of the key requirements are)

- *All drivers providing the service have suitable training (again we could refer to the specific unit standards here)*
- *Providers cannot refuse to take any Total Mobility passenger/trip not matter how short (provided they can do so safely)*
- *They are available to provide Total Mobility Services for reasonable hours agreed with the region for incorporation in contracts*
- *They charge fares in accordance with the principles set out*

The procurement manual should be updated to include a principles for entry of new providers into the Total Mobility scheme. It is noted that many of the possible 'principals' above could be included as sample standard contract conditions as well as an updated procurement manual.

The entry of new providers should be encouraged, especially where this is a lack of coverage by existing service providers. In areas not serviced by taxis, private hire and volunteer organisations may be the most efficient way of providing coverage and should be actively encouraged, with financial incentives as necessary. This issue is discussed further in section 5.5.2.

#### **Recommendations:**

24. The procurement manual should be updated to include principles for entry of new providers into the Total Mobility scheme.
25. The entry of new service providers should be encouraged, especially where this is a lack of coverage by existing service providers. In areas not serviced by taxis, private hire and volunteer organisations may be the most efficient way of providing coverage and should be actively encouraged, with financial incentives as necessary (refer section 5.5.2)

#### 5.5.2 Private hire and volunteer organisations

The NTZA note *Transport providers and fares* includes the following discussion regarding private hire and volunteer organisations:

##### **Problem statement**

19. *In recent years different types of providers have joined the scheme that are not taxis and there is little guidance on how such providers should charge for Total Mobility services, and how regions can be confident that the fares charged are fair and transparent.*

20. *A further issue is how to ensure the financial sustainability of wheelchair hoist vehicles for voluntary providers.*

##### **Discussion**

25. *There are now a number of private hire and volunteer organisations providing Total Mobility services. How these providers charge is less clear. Volunteer providers usually expect a donation. Private hire providers usually charge an hourly rate.*

26. *Volunteer providers generally charge based on a suggested donation. Under the Operator Licensing Rule, for a service to be a 'voluntary service' and thus exempt from the regulatory requirements to provide passenger services, any fare or donation paid can only be for the operational costs of running the vehicle and it must not include any payment to the driver. A further requirement in the Procurement Manual is that the fare must be lower than an equivalent taxi fare. As voluntary providers generally operate in areas where taxis are not commercially viable, it can sometimes be difficult to assess whether fares are lower than an equivalent taxi fare.*

27. *It may be useful to provide some guidance on how to assess if donations to voluntary providers are set at the appropriate level. A database of Total Mobility fares could be established to enable comparison of Total Mobility fares or donations for different types of providers across regions. As a national Total Mobility Administration system is established it will be easier to get data for such a database.*

28. Private hire providers generally charge either pre-booked point to point fares or an hourly rate. However, as the current rules prohibit private hire services from having a meter, it is harder to ensure that private hire fares are fair and accurate. One private hire franchise is looking at procuring a meter equivalent to integrate with electronic ticketing systems and to meet the requirements of some regions.

29. In one region, private hire providers have an NZTA exemption to use taxi meters for Total Mobility. While on the surface this seems like a suitable option, NZTA is not comfortable with this situation continuing and would like to find an alternative solution because:

Issuing exemptions to these private hire vehicles is effectively enabling them to operate as de facto taxi operators, outside the compliance rules and the limitations that are imposed on the taxi industry.

As NZTA is unwilling to issue exemptions to any new operators, the requirement for all providers to have a meter is acting as a barrier to market entry and competition

There is a high volume of work for NZTA associated with issuing annual per vehicle exemptions.

Access should be provided for range of transport providers, depending on local market conditions. Currently some regions are reluctant to accept new providers, particularly private hire services as it is hard to ensure fares are appropriate without taxi meters. The rules around volunteer providers are also unclear and admission to the scheme currently requires specific NZTA approval. As a result a number of towns where taxis are not financially viable do not have Total Mobility services. Recommend providing clear guidance for private hire and volunteer organisation service providers, including options for how fares should be charged. The introduction of the national administration system will also provide detailed information of fares across the country and should be used to benchmark fares against.

It is recommend that options using the company dispatch and fare zones be considered as appropriate way of dealing with private hire. It is not considered appropriate or necessary to provide dispensation for meter equivalents in private hire vehicles. Greater Wellington Regional Council have had some experience with this and may be able to provide some input.

The rules around voluntary organisations should also be reviewed, but this may require a wider consideration of regulations as not being able to pay the driver creates some difficulty. It is considered that voluntary organisations would be an ideal way of providing services in areas not viable for other companies but some form of payment might be appropriate.

**Recommendations:**

26. The procurement manual should be updated to include principles and clear guidance for use of private hire and volunteer organisation service providers, including guidelines for how fares should be charged.
27. The introduction of the national administration system will provide detailed information on fares across the country and should be used as a basis to benchmark private hire (and voluntary organisation) fares against.
28. Options using the company dispatch and fare zones be considered as appropriate way of dealing with private hire. It is not considered appropriate or necessary to provide dispensation for meter equivalents in private hire vehicles.
29. The rules around voluntary organisations should also be reviewed, but this may require a wider consideration of regulations as not being able to pay the driver creates some difficulty. It is considered that voluntary organisations would be an ideal way of providing services in areas not viable for other companies but some form of payment might be appropriate.

### 5.5.3 Charging fares for Total Mobility

The purpose of the Total Mobility scheme is to provide subsidised taxi fares for people with disabilities. Fare policy of the scheme is based on standard taxi fares, with some taxi vans charging a slightly higher per kilometre tariff (tariff 2) and a wheelchair hoist payment.

There are a number of other methods that could be used for charging fares, as set out in Appendix B, which could be considered for private hire companies and voluntary organisations (i.e. organisations that are not approved taxi organisations and which cannot have a meter without dispensation). The setting of maximum fares is discussed in section 5.3.1.

The NTZA note *Transport providers and fares* includes the following discussion regarding charging fares for Total Mobility:

#### **Problem statement**

18. *The Total Mobility Scheme's purpose is to provide subsidised taxi fares for people with disabilities. Fare policy of the scheme is based on standard taxi fares, with some taxi vans charging a slightly higher per kilometre tariff (tariff 2) and a wheelchair hoist payment.*

#### **Discussion**

21. *The Total Mobility Scheme was designed to provide subsidised taxi fares. Approved Taxi Organisations have specific rules for how taxis charge. Fares charged are regularly checked through meter calibration when vehicles are inspected. Fare schedules must be notified to the NZTA, but NZTA does not have any mandate to refuse or alter fares as the market is seen as the best mechanism for setting general taxi fares. Fares are normally made up of a flag fall when a journey starts, a per-kilometre rate and a different rate for waiting time. Fares can also have a time based component; for example taxis may charge a higher after-midnight rate. Taxis are also permitted to charge a pre-quoted point-to-point fare, but must leave the meter running and customers can choose to pay the metered fare if it is cheaper.*

22. *There is also an additional payment of \$10 (GST excl) per hoist user for wheelchair hoist vehicles on top of standard fares. This is currently paid to taxi and private hire providers, but not volunteer providers.*

23. *Because the different components of the fare are transparent, and the meter calculates the fare for a particular distance, there is reasonable confidence around taxi fares.*

24. *While all providers are required to notify the relevant regional council about their fares, it is not clear to what extent regional council's currently influence or approve fares.*

45. *There are several possible approaches to fare setting that could become approved procurement procedures if analysis shows that they deliver value for money. Some of these are set out in Table 7.2.*

#### **NZTA's policy position**

37. *NZTA's Guide for Local Authorities provides guidance on calculating maximum fare subsidies, but not on what methods of charging are acceptable. Other than using standard taxi's fares regional councils have been left to develop approaches independently. The Procurement Manual currently requires donations paid for voluntary services to be less than average taxi fares, but doesn't provide any other guidance.*

38. *While part of the rationale for the 2005 review was to improve national consistency, regional variations in approach may be appropriate, provided they meet NZTA procurement criteria and are transparent and justifiable.*

39. *All providers receiving NZTA funding must be procured in accordance with approved procurement procedures designed to obtain best value for money.*

40. *There is an expectation that procurement strategies should set out the strategic approach regions are taking to Total Mobility, including how providers can join the scheme and how fares can be charged. However most procurement strategies do not do this. Having some simple guidance on what types of charging were pre-approved procurement procedures could make/ this easier for regional councils.*

41. *While under the NZTA procurement philosophy regional councils could develop their own approaches to charging for Total Mobility, more specific NZTA guidance may be beneficial to improve regional consistency, accommodate cross regional travel, reduce inequity and*

*improve ease of administration. Further, we are conscious of the complex nature of the scheme and limited resources in many regional councils.*

*42. NZTA is also concerned about fraud and how this can be minimised through better systems.*

*43. NZTA generally takes a principles based approach to procurement. Some possible principles for Total Mobility fares that could help inform what approaches regions choose are:*

- Ensuring value for money*
- Enabling a competitive and efficient market place of Total Mobility providers where, if possible, customers have a choice of providers.*
- Fair, transparent and open methods of fare setting*
- Availability of data and auditability of fares charged for journey*
- Ability to integrate fares into the National Total Mobility Administration System as it is implemented*
- Fares that do not compromise operator sustainability*

*44. Guidance on supplier selection and contracting could provide for regional councils to approve fares and the manner of charging as part of letting the contract. While in some circumstances this may simply involve accepting the fares of the taxi company it would also provide greater flexibility and control to how private hire services are treated and negotiating lower rates.*

NZTA has indicated a desire to adopt a principles based approach to the procurement of Total Mobility services and setting of fares. This would be an appropriate approach to setting out of all NZTA guidance on the Total Mobility Scheme.

Regional councils should be able to consider and have some input into the setting of fare schedules. In regions where there is substantial competition there might be some merit in a competitive tender to identify preferred transport providers, with the Total Mobility tariff being one factor.

The sustainability of transport operators is an important factor, however, this is primarily an issue in areas where it is difficult to maintain a taxi or other service rather than bigger centres. In these areas there may be more appropriate delivery models such as supporting voluntary organisations, although the issue of voluntary organisations not charging fares may need to be addressed.

Taxi fares should continue to be based on taxi meter. Private hire and voluntary organisation charging of fares are discussed in section 5.5.2.

**Recommendations:**

30. The procurement manual should be updated to include principles for how fares are charged (and other guidance).
31. The sustainability of transport operators is primarily an issue in areas where it is difficult to maintain a taxi or other service rather than bigger centres. In these areas there may be more appropriate delivery models such as supporting voluntary organisations, although the issue of voluntary organisations not charging fares may need to be addressed.

#### 5.5.4 Commercial viability of wheelchair hoist vehicles

The NTZA note *Transport providers and fares* includes the following discussion regarding the commercial viability of wheelchair hoist vehicles:

***Problem statement***

*20. A further issue is how to ensure the financial sustainability of wheelchair hoist vehicles for voluntary providers.*

***Discussion***

30. Total Mobility fares and charging methods are generally based on standard taxi costs, with an additional \$10 payment made for use of the wheelchair hoist. However, hoist vans that provide a critical part of the Total Mobility services have a different cost structure to sedans. The differences in cost structure are:

- Higher vehicle purchase costs
- Higher operating costs
- Hoist installation and maintenance costs (although this is provided for through hoist installation grants)
- Longer 'dead running' between jobs due to dispersed client base
- A higher proportion of short trips due to the nature of the clientele

31. As a consequence, despite the \$10 payment for hoist use, many hoist vehicles often only remain financially viable because of Special Education School Transport Assistance (SESTA), Accident Compensation Corporation or District Health Board (DHB) contracts. These contracts also tend to use most of the capacity of the hoist vehicle fleet at certain times of day. This can be a barrier to Total Mobility clients who would otherwise use services at these times, for example, to travel to tertiary training.

32. While the total number of hoist vehicles in New Zealand has almost doubled from 164 in 2005 to 314 in 2011/12, there are still some areas which may be underprovided and some towns with no hoist vehicles. The national average in 2011/12 was one hoist for every 157 scheme members. But Auckland has a much higher rate at one hoist per 86 scheme members, and Northland has one of the lowest rates at one hoist per 557 scheme members.

33. A number of hoist providers have looked at different ways of charging as they feel current taxi fares do not adequately cover their costs.

34. The wheelchair hoist payment was intended to address the difference in costs, but in order to be eligible for the \$10 hoist payment taxis must not run the meter while loading and unloading clients. Consequently many hoist providers feel that they are not any better off. NZTA recently changed the basis of this payment to reinstate the original policy intent after it was brought to its attention that for some operators \$10 per trip was not adequate when they had multiple passengers requiring the use of the wheelchair hoist.

35. Volunteer providers are not currently eligible for wheelchair hoist payments. However the wheelchair hoist payment is partly to cover operational costs such as maintenance of the hoist which voluntary services do incur. Conversely, part of the wheelchair hoist payment is also to compensate taxi drivers for the additional amount of time taken to assist wheelchair passengers into the van, and as voluntary services cannot pay drivers that part of the hoist payment is not applicable.

36. To address the difference in costs between hoist and non-hoist vehicles, an option would be to look at differential fares for hoist vehicles. However that would be contrary to the 2005 review recommendations which sought to place wheelchair hoist users on the same basis as other scheme members.

The existing policy and hoist payment should be retained. The hoist payment appears to be an important incentive for transport providers to provide hoist vehicles.

This incentive is probably most necessary in those areas that are marginal for taxi company operations and where volunteer organisations may be required to provide coverage. For this reason it is considered that volunteer organisations should be eligible for the full wheelchair hoist payment. Volunteer organisations rely on donations and in many ways the full hoist payment could be considered a donation to the organisation as no other fares are payable.

While hoist payment to taxi companies in part covers driver time for volunteer organisations the payment would not be for driver time but to provide incentives necessary to ensure coverage of a service. There is also an equity argument in that volunteer organisations who provide the same services as a taxi company shouldn't be worse off. There may be some benefit in reviewing the regulations around payments to volunteer organisations.

**Recommendations:**

32. Existing policy and payment should be retained for wheelchair hoist vehicles.
33. Consider making full hoist fee available to volunteer organisations, as they contribute to coverage of the scheme in areas not viable commercially and this would provide incentive for those vehicles to be available.
34. Consider reviewing the regulations around payments to volunteer organisations.
35. Further work is required to determine whether or not wheelchair hoist payments are achieving their goal.

## 5.6 Administration and monitoring

The following table provides a summary of administration matters that have been considered.

Table 5.6 Administration considerations

Area	Comments
Development of a national administration system	Issue 6. The national administrative system will provide quality information on the use of the Total Mobility scheme, from detail on assessments undertaken through to trips and fares charged. It will provide a strong set of information on which to base policy and improve regional consistency. There are also opportunities to tie policy changes to the implementation of the new system. Refer data and monitoring section <b>Error! Reference source not found.</b>
Direct cost shifting from other government agencies	Issue 21. Appendix D provides summary of the range of assistance available. Recommend that the issue of direct cost shifting from other government agencies be considered as a separate review work stream.
Indirect cost shifting	Issue 22. Recommend separate work-stream on this matter (combined with direct cost shifting issue above).
Fraud policy	Issue 23. Recommend that NZTA development clear requirements and recommended processes for the detection of fraud by regions. Regions should be required to report this through to NZTA. All regions should be encouraged to use the national administration system (or alternatively provide their own equivalent level of fraud detection).
Data and monitoring	Current monitoring and reporting practices are considered inadequate for policy development <sup>14</sup> . There are currently two sources of information provided to the NZTA by regional councils: <ul style="list-style-type: none"> <li>• Quarterly and annual achievement reports – refer section 5.6.1</li> <li>• Annual customer satisfaction surveys – refer section 5.6.2</li> </ul> NZTA are currently reviewing monitoring requirements for public transport generally (as part of the implementation of the Public Transport Operating Model) and it would be desirable to make any changes to Total Mobility monitoring at the same time.

<sup>14</sup> The bulk of material in this section is sourced from an NZTA memo "Proposed improvements to Total Mobility monitoring and data" dated 26 September 2012.

**Recommendations:**

36. Investigate range of opportunities to tie policy changes to the implementation of the new national administration system.
37. The issues of indirect and direct cost shifting from other government agencies should be considered as a separate review work stream.
38. The NZTA should develop clear requirements and recommended processes for the detection of fraud by regions. Regions should be required to report this through to NZTA.
39. The national administration system will greatly increase the ability to detect fraud and this should be a requirement for all regions or they should be required to provide their own equivalent level of fraud detection.

## 5.6.1 Quarterly and annual achievement reports

Quarterly and annual achievement reports are submitted using the NZTA's *Transport Investment Online* (TIO) tool. There is some uncertainty as to whether the information provided is measured and reported in a consistent manner and therefore this information must be treated with caution when using as a basis for policy decisions.

The NZTA memo *Proposed improvements to Total Mobility monitoring and data* includes the following regarding TIO quarterly and annual achievement reports:

**TIO reporting**

16 Currently regions enter achievement returns, patronage and financial claims into Transport Investment Online. While this data enables some Total Mobility trends to be monitored, it does not provide a sound basis for policy decisions, a full picture of the performance of the scheme, information about whether the scheme is meeting customer needs, or enable future demand to be predicted.

17 In addition in the past some of this information has not been well utilised, or reported on. There is a need to ensure that provision of data is not seen as a compliance exercise but adds value.

18 Currently the lack of consistent information is a barrier to improving the efficiency, effectiveness and consistency of the Total Mobility scheme. It is also a barrier to scoping and undertaking work on cross government work to improve the coordination of transport assistance for people with disabilities.

**Proposed changes to data reporting**

19 The development of the NTMAS is an opportunity to introduce better processes for data collection and it is important that we identify what the business requirements for data are as early as possible in the development of NTMAS.

20 Ideally the NTMAS will have an interface where assessors can enter client information and eligibility directly into a database triggering the issue of a card. Operator information, such as driver training, and hoist vehicles could also be recorded in the system. Card transactions entered in the system will be recorded against the client and operator. This will enable much more comprehensive information than is currently available and automate reporting processes, reducing the burden on Total Mobility Coordinators while improving data collection.

Some data that should be collected are:

- Client data
  - Number of clients - Client records in NTMAS
  - Number of clients requiring the use of the wheelchair hoist - Client records in NTMAS
  - Age and gender of client - Client records in NTMAS

- *Nature of the impairment (physical sensory, intellectual, neurological) - Client records in NTMAS*
- *Number of clients who can use public transport some of the time - Client records in NTMAS*
- *Provider data*
  - *Number of providers by type (taxi, private hire, voluntary) - Provider records in NTMAS*
  - *Number of wheelchair hoist vehicles - Provider records in NTMAS*
  - *Average age of wheelchair hoist vehicles/hoists -Provider records in NTMAS*
  - *Number of providers who been removed from the scheme due to contract breaches/misconduct. - Provider records in NTMAS*
- *Assessment agency data*
  - *Number of assessment agencies - Assessment agency contracts*
  - *Cost of assessment/membership of assessment agency - Assessment agency contracts*
- *Financial performance*
  - *Subsidy (NZTA and local share)*
  - *Lowest and highest subsidy per trip*
  - *Maximum fare subsidy*
  - *Percentage of trips higher than the maximum fare subsidy*
  - *Number of trips*
  - *Costs/number of hoist replacements*
  - *Number of wheelchair hoist flat payments*
  - *Number of wheelchair hoist trips (ie. How many hoist trips carried more than one passenger)*

21 At present not all regions may be able to provide this information, as they are using paper based administrative systems. There will need to be a transitional period for regions to adapt systems and to enable uptake on NTMAS. As NTMAS is implemented it will become much easier to collect and report on this information as it will become automated.

22 Frequency of data collection, systems for collection and reporting should be aligned with those for public transport more broadly.

**Proposed next steps for quarterly and annual reporting**

- *NZTA seek agreement from regions for the key data sets to be collected, recognising that not all regions may be able to provide them at this time*
- *The desired data sets are fed into the National Total Mobility Administration System design process*
- *NZTA manuals, systems and processes are amended to reflect the new monitoring requirements*

The introduction of the national administration system (NTMAS) will essentially provide all the above information on Total Mobility in regions, plus additional information. It is recommended that the NZTA ensure that the national administration system is specified to include all the above information and standard reports for NZTA to run reports directly on the system. This would provide better and more up to date information that TIO can and also reduce the administration requirements for regions to enter information in TIO. Those regions without the national administration system would be required to submit information to NZTA in the same format as the NZTA reports in the national administration system reports. Recommend policies and guidance be updated to reflect this.

**Recommendations:**

40. The national administration system would be used to meet quarterly and annual reporting requirements and that NZTA should run these reports directly on the system. Those regions without the national administration system would be required to submit information to NZTA in the same format as the NZTA reports in the national administration system reports
41. NZTA should ensure that the national administration system is specified to collect all the information required above and to include standard reports that NZTA can run.
42. Update policies and guidelines to reflect new data and reporting requirements arising from national administration system.

### 5.6.2 Annual customer satisfaction surveys

Customer satisfaction surveys are supposed to be carried out on an annual basis but in many regions surveys are undertaken biennially or less frequently. This is driven in part by the low level of relevance of many questions and the small sample size<sup>15</sup>. In addition, due to the nature of their impairment, there are a proportion of Total Mobility clients that have difficulty answering surveys independently. Often the same small group of clients are repeatedly asked the same questions.

The NTZA memo *Proposed improvements to Total Mobility monitoring and data* includes the following regarding annual customer satisfaction surveys:

*5 The general questions asked for the customer satisfaction survey are currently the same as those asked for public transport generally. Total Mobility coordinators have raised queries about the relevance of some of these questions. In some regions the survey questions have been changed to provide more useful information, but this means that information from these regions is not comparable.*

*7 It may be more efficient for the NZTA to coordinate Total Mobility satisfaction surveys on a national basis using a consistent methodology and questions. This would reduce council administration costs, by decreasing the total cost of surveying and improving the value of results.*

*8 However, some regions have taken ownership of surveying and ask regions specific questions. Any move towards national surveying would need to consider how to take these into account.*

***Proposed approach to customer satisfaction surveys***

*The small number of clients and trips (about 1.5 million in 2011/12) suggests that surveys may not need to occur annually, but could be undertaken triennially to align with the national land transport programme. This could be administered nationally, but distributed to clients regionally, with the to add additional questions if desired.*

*The NZTA could undertake or commission analysis and produce a report showing national satisfaction levels, regional satisfaction and comparisons between regions. This would be more cost effective than the current status quo where many regions outsource this work to different consultants. It would also make the data more useful for policy development and reporting.*

*The standard questions for the survey should be changed to increase their relevance to Total Mobility, and to align with the new rating scale proposed for public transport. The methodology and scale will also need revision. Once agreement is reached on what aspects are being surveyed NZTA will seek expert input into the survey design including questions wording, scale and methodology It is suggested that questions cover the following aspects:*

- *Availability of services when needed*
- *Acceptability of wait times*

<sup>15</sup> There are approximately 55,000 Total Mobility clients spread across 14 regions, some of which have sub-regional schemes. Over half the schemes have less than 2,000 members.

- *Trip purpose*
- *Helpfulness/attitude of driver*
- *Perception of safety and security*
- *Availability of information/assistance*
- *Overall satisfaction*
- *Other comment/suggestion/one thing the client would change*

13 Demographic data such as age, gender, region, type of impairment and reliance on mobility aids, is a lens through which this information should be analysed. After the National Total Mobility Administration System (NTMAS) is introduced it may not be necessary to collect this information through the survey, as it will exist in the database and the survey methodology could be designed so that a representative sample is selected or a Total Mobility identification number could be requested. However, in the interim it may be necessary to include some demographic questions in the survey.

14 This information would give a much better idea of whether Total Mobility is meeting the needs of client base, or if there are particular issues, such as availability of hoist vehicles at certain times that need further consideration.

15 If the shift towards a nationally coordinated three yearly survey, is supported, NZTA will seek expert input into the survey design including questions wording, scale and methodology.

**Proposed next steps for customer satisfaction monitor**

NZTA seek support from regions to move towards implementing a nationally coordinated 3 yearly survey before the next National Land Transport Programme

If NZTA gains support from regions, we seek expert input into survey design

NZTA manuals, systems and processes are amended to reflect the new monitoring requirements

Recommend replacing existing regional surveys with a national customer satisfaction monitor as proposed. Customer satisfactions surveys are not to do with use of the system so much as the perceptions of the system and are an important policy consideration, rather than an administration one. The national administration system should be used as the source for client and address details but the survey should be carried out independently of the system and not linked by, for example, client number. This is partly because respondents may be concerned that their responses will affect the eligibility and respond accordingly. There are also potential privacy reasons.

The frequency and timing of national surveys should be discussed with regions, including how the information might be expected to be used by regions.

**Recommendations:**

43. Replace existing regional surveys with a national customer satisfaction monitor as proposed by the NZTA.
44. The national administration system should be used as the source for client and address details but the survey should be carried out independently of the system.
45. The frequency and timing of national surveys should be discussed with regions, including how the information might be expected to be used by regions.

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## Appendix A Maximum fares and key factor data

The following table is incomplete due to lack of readily available information. It is also unclear whether the average subsidy per trip might be the fare paid by passengers (there should be a difference between two due to maximum fare). Table 6.1 Maximum fares and key factor data 2011/12

Region	Maximum fare (\$) <sup>(a)</sup>	Avg. subsidy per trip (\$)	Number of TM clients	Number of TM trips (000) <sup>(d)</sup>	Total TM subsidies (\$)
Northland	15	5.24		35	
Auckland	80	11.79		353	
Waikato	40	6.48		56	
Bay of Plenty	26	10.15		85	
Taranaki	12	5.55		65	
Gisborne	30/50 <sup>(b)</sup>	11.80		26	
Hawkes Bay	20	6.78		69	
Horizons	10-20 <sup>(c)</sup>	4.34		171	
Whanganui	20	-		-	
Palmerston North	20	-		-	
Taumarunui	20	-		-	
Levin	10	-		-	
Foxton	10	-		-	
Marton	10	-		-	
Feilding	10	-		-	
Wellington	80	15.75		245	
Nelson/Tasman	40?	7.25		32	
Marlborough	40?	4.77		20	
West Coast	30	6.05		?	
Canterbury	50-70 <sup>(c)</sup>	9.26		205	
Christchurch	70	-		-	
Ashburton	50	-		-	
Timaru	60	-		-	
Waimate	60	-		-	
Otago	50	7.98		107	
Southland	50	5.75		54	
<b>Total</b>	-	-		<b>1,522</b>	

(a) Total Mobility subsidy is up to 50% of maximum fare.

(b) Special fare to specified locations

(c) Maximum fare varies by town

(d) Number of trips from 2010/11 financial year

## Appendix B Possible approaches to transport provider fare setting

Table 6.2 Possible approaches to transport provider fare setting<sup>16</sup>

Option	Comments
A standard taxi meter, containing a flag fall, per km tariff and wait time tariff	<ul style="list-style-type: none"> <li>This remains the best option for taxi services. Regional councils may like to try and negotiate a lower than standard tariff if possible for Total Mobility services</li> <li>This option while providing clarity, is not favoured by NZTA for private hire services due to the reasons set out above in paragraph 29.</li> <li>This option is not appropriate for volunteer services as it would increase their compliance costs and they are required to charge lower than equivalent taxi fares recognising that they should not have any labour costs.</li> </ul>
Pre-agreed point to point fares	<ul style="list-style-type: none"> <li>These can work well for specific trips, such as city to airport trips and where there are common origin and destination pairs, for example, a rest home and nearby shopping centre</li> <li>Are simple and clear for Total Mobility scheme members to understand if they make frequent journeys between the same origin and destination.</li> <li>Can be very complex, as particularly in larger regions, there will be very large numbers of origin and destination sets, and many trips that do not conform to easily recognisable patterns</li> <li>Can be highly complex to establish and administer</li> <li>There is a need to ensure that they are not more than an equivalent taxi fare for the journey</li> </ul>
Zonal fares	<ul style="list-style-type: none"> <li>Many taxis companies already have zones established for fare origins</li> <li>Once zones are established they can be relatively simple to administer as drivers need to record the origin and destination zone</li> <li>Can be simple to understand if zones are clearly communicated, but has potential to cause confusion if there are large numbers of zones</li> <li>Can penalize some short trips depending on zone boundaries</li> <li>If zones are too large fares may have to be set at a level that is higher than an equivalent taxi fare</li> <li>Different taxi companies may have different zones</li> <li>Can be hard to audit without GPS data.</li> </ul>
Distance based	<ul style="list-style-type: none"> <li>Very effective where there is reliable GPS data of travel patterns</li> <li>Possibility for misuse through taking indirect routes</li> <li>Could be higher than a taxi fare for short trips as the flag fall will be built into the per-kilometre tariff.</li> </ul>
Time based	<ul style="list-style-type: none"> <li>Simple to understand and easy to administer</li> <li>May result in higher fares where there is congestion</li> <li>May not adequately reflect costs for short trips</li> <li>Need to have confidence that the time recorded accurately reflects travel time and not waiting time or time spend assisting the client.</li> </ul>
Bulk funding of operators with fixed donation from clients.	<ul style="list-style-type: none"> <li>This could work well in areas where there are specialist providers with no competition</li> <li>If the lump sum amount is not set appropriately there is a risk that the service will not be value for money, or that operator sustainability could be compromised.</li> <li>Makes it harder to monitor trend data as average fare per trip is not collected</li> <li>Could result in lower costs in some circumstances.</li> </ul>

<sup>16</sup> These approaches are taken from NZTA note on "Transport providers and fares".

## Appendix C Disability Action Plan

The Office of Disability Issues in the Ministry of Social Development is putting up [or has put up] a Cabinet paper seeking cross government transformational actions to be included in the Disability Action Plan<sup>17</sup>. The NZ Transport Agency is using this cross government work as an opportunity to improve the consistency and administration of the scheme.

The Disability Action Plan is a response to the UN Convention on the Rights of People with Disabilities that the New Zealand Government signed up to in 2008<sup>18</sup>. The Disability Action Plan is seeking transformational cross government shared outcomes that will<sup>19</sup>:

- a. Enable Good Lives: Government services and specialist disability supports provide opportunities for disabled people to have a good life on an equal basis with other
- b. Rebuild Christchurch: The rebuild of Christchurch is inclusive of disabled people
- c. Employment: Improving the economic participation of disabled people

Transport is seen as a key enabler to help achieve all three themes. Across these three themes there is an emphasis on building the resilience of individuals and communities, and applying a disability lens to mainstream supports to lessen people's reliance on specialist disability support services. When looking at specialist disability supports there is a shift to making these person centred and flexible. The Ministries of Health, Education, Social Development and the Accident Compensation Corporation are all doing significant work in this space.

One key idea is that of having one place or person for people with disabilities to go to access information about the supports provided by different government agencies and their eligibility, rather than needing to approach each agency separately. The Ministry of Health is leading this work. At this stage it is not proposed that transport be included.

Currently at least six government agencies, including the NZTA, are providing some transport assistance for people with disabilities. There is some confusion, cost shifting, areas of overlap and there may be gaps in what is available. There is a need to better understand and coordinate this assistance as currently it is fragmented and the criteria for eligibility are unclear. The Public Transport Investment Team, as part of the management of the Total Mobility Scheme, have started preparing a document, *Key messages about Transport assistance for people with disabilities*, describing the assistance that is currently available. It is intended that this document be provided to regional council Total Mobility Coordinators and assessment agencies.

The Officials group have discussed using the Key Messages document as a base to scope longer term work to better coordinate transport assistance for disabled people. Greater coordination could result in better provision for individuals and efficiency gains in administration. An example of this is eligibility assessments. The Total Mobility Scheme, the Ministries of Health, Social Development, Education and the Accident Compensation Corporation have different criteria and assessment processes for transport assistance although most people with disabilities will be receiving some assistance from a combination of these agencies. Longer term work could look at whether it would be

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<sup>17</sup> This section is based on an extract from the NZTA memo "Update of Total Mobility and cross government work on the Disability Action Plan" dated 26 September 2012.

<sup>18</sup> The Disability Action Plan's governance strategy includes the Minister for Disability issues, a Ministerial Committee, a Chief Executives group and an Officials group. NZTA is involved in the Officials group, Transport is represented on the Chief Executives Group by Martin Matthews, Chief Executive of the Ministry of Transport and on the Ministerial Group by Hon Simon Bridges, Associate Minister of Transport.

<sup>19</sup> At this stage actions are Christchurch focused, but earlier discussions highlighted a need to better coordinate the whole of government transport spend for people with disabilities to improve their quality of life.

possible to make transport assistance more person centred such as through pooling of funding across departments. This has the potential to result in an approach that is outside of current legislative and administrative settings.

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## Appendix D Summary of transport assistance available to people with disabilities

This appendix provides a guide to the types of transport assistance are available from government agencies for people with disabilities<sup>20</sup>. It provides a brief outline of the main types of transport assistance available, what the assistance can be used for, if there are any applicable eligibility criteria and where to obtain further information<sup>21</sup>.

### D1 Quick reference guide

Table 6.3 provides a quick reference guide to what assistance is available from different agencies and the key eligibility criteria with the rest of the appendix providing further detail on these, including contact details.

Table 6.3 Quick reference guide to transport assistance (as at September 2012)

Agency	Type of assistance	What it can be used for	Who can use it	Other eligibility criteria	Restrictions of use
NZ Transport Agency and regional councils	Total mobility scheme	Any trip purpose	People who have a disability or impairment that has or will last longer than 6 months and are unable to travel independently on public transport.	Must be assessed by a contracted assessment agency to join the scheme.	Discount does not apply to scheduled public transport. Cannot be a substitute for transport that is the responsibility of another government agency.
Ministry of Education	Special education school travel assistance	Travel to and from school.	Students with special needs.	Students may need to attend nearest appropriate school.	
Ministry of Social Development	Disability allowance	Ongoing costs of travel to a health practitioner or counsellor and additional travel costs for everyday activities associated with their disability.	New Zealand citizens or permanent residents who have a disability that is likely to last at least 6 months and causes additional costs while undertaking	People must meet an income test.	Cannot be paid for costs that are fully covered by another agency.

<sup>20</sup> The bulk of material in this section is sourced from an NZTA document "Key messages about transport for people with disabilities"

<sup>21</sup> The information in this document has been summarised from sources provided by the respective agencies and their websites and should not be relied on to be the complete policy. It is provided as guidance only. Individuals or assessors should approach the appropriate agency if they require more information about their eligibility and the availability of particular types of transport assistance.

			everyday activities.		
	Social disability allowance	To assist with extra travel costs where a partner is in residential care.	People who have a partner with a disability living in residential care receive a benefit, or whose partner gets a subsidy or who pays benefit contributes to care costs.		
	Civilian amputee assistance	To attend an Artificial Limb Centre.	People who need artificial limbs fitted or adjusted.		
District health boards	National travel assistance	To travel to see specialists.	People who are referred by a specialist to see another specialist.	The specialist must be part of the public health system.	
Ministry of Health	Residential care and support subsidies	For transport to health providers.	People who live in residential care and are eligible for the subsidy.	Income and asset testing apply.	
	Vehicle medication and purchase assistance	To modify (or in a few cases purchase) a vehicle.		Income and asset testing apply.	In some cases funding can be supplemented with grants from the Lottery Welfare Individuals with Disabilities subcommittee.
Accident Compensation Corporation	Transport assistance	Non-emergency treatment costs, and to maintain employment.	People who have an injury that is covered by ACC.	Types of travel are restricted and distance (or cost for public transport) criteria apply.	

## D2 Assistance available

**Table 6.4 NZ Transport Agency and regional councils - Total mobility scheme**

<p>What is the Total Mobility Scheme?</p>	<p>The Total Mobility Scheme subsidises 50% of the fare for taxi (and in some case voluntary or specialist mobility provider) trips for people who have mobility constraints that prevent them from using public transport. The scheme also provides financial assistance to operators to install wheelchair hoists and extra payments to the operator for the use of the wheelchair hoist.</p> <p>The Total Mobility Scheme is administered by regional councils with funding from rates and the National Land Transport Programme (Managed by the NZ Transport Agency). The scheme was reviewed in 2005 to improve the consistency of how entitlement and eligibility were determined across the country. As a result of this review, many regions have been making changes to how they administer the scheme.</p>
<p>What can the Total Mobility Scheme be used for?</p>	<p>The Total Mobility Scheme is not restricted to particular types or purposes of trip. Rather it is to enable scheme members to be able to participate in normal everyday activities. However, there are some specific restrictions on what Total Mobility can be used for. For example, it cannot be used for travel costs that would normally be the responsibility of an employer.</p> <p>The Total Mobility Scheme cannot be used to substitute or supplement in part or in full for travel that it the responsibility of other government agencies such as the Ministries of Health or Education, District Health Boards or the Accident Compensation Corporation.</p> <p>Total Mobility vouchers (or cards) cannot be used on public transport (urban buse trains and ferries).</p> <p>To manage funding levels some regions may limit the number of vouchers customers are able to get per month. The Total Mobility Scheme can be used for—any purpose (unless specifically excluded), but Total Mobility customers must cover half the cost of the taxi fare themselves.</p>
<p>What eligibility criteria apply?</p>	<p>Assessment agencies assess people wishing to join the scheme based on the following criteria:</p> <p>An eligible person must have an impairment that prevents them from undertaking any one or more of the following five components of a journey unaccompanied, on a bus train or ferry in a safe and dignified manner:</p> <ol style="list-style-type: none"> <li>i. Getting to the place from where the transport departs</li> <li>ii. Getting onto the transport</li> <li>iii. Riding securely</li> <li>iv. Getting off the transport</li> <li>v. Getting to the destination</li> </ol> <p>The impairment must have lasted, or be expected to last more than six months.</p> <p>People may be eligible part, but not all the time if their impairment is such that they can use public transport some of the time, or on particular journeys.</p> <p>Children are eligible provided they are of an age where their peers could be expected to travel independently (except in Northland, Waikato and the West Coast'), but travel to school is excluded as this is the responsibility of the Ministry of Education.</p> <p>People in residential care are eligible (except in Waikato'), although trips that are the responsibility of the care provider or another government agency, such as travel to medical appointments are excluded.</p> <p>The inclusion of children in the Total Mobility Scheme was one of the recommendations of the 2005 Review. Regional Councils were given an option to sign up to implement these recommendation and received a higher rate of financial assistance. These three regions have not yet committed to implementing both phases of recommendations. The exception is because the Waikato Regional Council has not signed up to implement this recommendation.</p>
<p>Where can I find out</p>	<p>The Total Mobility Scheme: A guide for local authorities and Total Mobility around New</p>

more?	Zealand, available on the NZ Transport Agency website <sup>3</sup> provide further information. Information on the Scheme can also be provided by the regional councils.
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**Table 6.5 Ministry of Education - Special education school transport Assistance**

What is special education school transport assistance?	<p>The Ministry of Education provides transport to school for eligible students who have mobility or safety needs that prevent them from traveling independently to and from school.</p> <p>There are three types of Special Education School Transport Assistance which may be provided to eligible students to assist with transport from home to the nearest school or setting that is able to meet their special education needs:</p> <ul style="list-style-type: none"> <li>- A place on a school bus; or</li> <li>- A place on a contracted special education transport service (taxi, minibus or total mobility vehicle 4); or</li> <li>· A conveyance allowance.</li> </ul> <p>Please note total mobility vehicle term here is used to refer to a vehicle equipped with a wheelchair hoist, it does not mean that the trip is eligibility for Total Mobility assistance.</p>
What can special education school transport assistance be used for?	Special Education School Transport Assistance can be used for travel to and from the nearest appropriate school (in the case of students with higher needs this will often not be the closest school) and the child's home. Assistance can also be used for travel between school and a respite care home or an alternative home address, where formal respite or alternative care arrangements have been made at an address other than the student's usual home, or in situations of shared custody where the student is resident at more than one home address.
What eligibility criteria apply?	<p>If a student cannot safely access the school bus service, the type of assistance provided to eligible students is determined by considering the special educational needs of the individual student, the school attended and the availability of places on existing special education transport routes.</p> <p>Applications are assessed for eligibility and eligible students are granted assistance for either a specified period or for as long as the student's circumstances or special education needs don't change.</p>
Where can I find out more?	Parents can apply for Special Education School Transport Assistance by completing an application form available from the Ministry of Education's website <a href="http://www.minedu.govt.nz/NZEducation/EducationPolicies/Schools/SchoolOperations/SchoolTransport.aspx">http://www.minedu.govt.nz/NZEducation/EducationPolicies/Schools/SchoolOperations/SchoolTransport.aspx</a> or local Special Education Office, and from the Ministry of Education's transport service agents.

**Table 6.6 Ministry of Social Development – Disability Allowance**

What is the Disability Allowance?	<p>The Disability Allowance is an allowance for people (including partners and dependent children) with disabilities to meet costs that are:</p> <ul style="list-style-type: none"> <li>· regular and ongoing</li> <li>· a direct result of a disability which is expected to continue for at least 6 months</li> <li>· additional to, or over and above those costs that a person without a disability would have</li> <li>· not fully funded by another agency such as Health, ACC or other accident insurers, Education, regional councils; and</li> <li>· not a residential care service.</li> </ul> <p>The Disability Allowance cannot be used to cover costs that are funded by another agency such as Health and Education. However, in some cases, it maybe available if the costs are only partially funded by another agency, such as ACC. People with partially funded costs should talk with Work and Income about their circumstances.</p>
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What eligibility criteria apply?	To qualify for Disability Allowance the person must: <ul style="list-style-type: none"> <li>· meet an income test (people on a benefit will usually qualify) · have a disability that is likely to last at least 6 months</li> <li>· have ongoing, additional costs arising from that disability</li> <li>· be a New Zealand citizen or permanent resident, who normally lives here.</li> </ul>
What can the disability allowance be used for?	Disability Allowance can be paid to assist with any additional costs including transport costs such as the following: <ul style="list-style-type: none"> <li>regular travel to and from a health practitioner for supervision or treatment · travel to and from counselling</li> <li>· additional travel costs incurred because of their disability while undertaking everyday activities.</li> </ul> <p>The Disability Allowance cannot be paid for any costs that are fully funded by another agency.</p> <p>The amount of Disability Allowance paid depends on the extra costs the disabled person has because of their disability. The maximum amount payable is a fixed sum set by the Ministry of Social Development.</p>
Where can I find out more?	For more information contact Work and Income either: <ul style="list-style-type: none"> <li>Through their website: <a href="http://www.workandincome.govt.nz/">http://www.workandincome.govt.nz/</a> · On the free call number: 0800 559 009</li> <li>Or by visiting your local Work and Income Office.</li> </ul>

**Table 6.7 Ministry of Social Development – Special disability allowance**

What is the Special Disability Allowance?	A Special Disability Allowance is a weekly allowance paid to a client living in the community to help with extra costs including travel associated with their partner being in hospital or residential care when: <ul style="list-style-type: none"> <li>· they are receiving NZ Superannuation, Veterans Pension, Invalids Benefit, Unemployment Benefit, Sickness Benefit or a related Emergency Benefit and the partner is in hospital and receiving a reduced rate of benefit or</li> <li>· the partner is in residential care and receives a Residential Care Subsidy.</li> </ul>
Where can I find out more?	For more information contact Work and Income either: <ul style="list-style-type: none"> <li>Through their website: <a href="http://www.workandincome.govt.nz/">http://www.workandincome.govt.nz/</a> · On the free call number: 0800 559 009</li> <li>Or by visiting your local Work and Income Office.</li> </ul>

**Table 6.8 Ministry of Social Development – Civilian Amputee Assistance**

What is Civilian Amputee Assistance?	Civilian Amputee Assistance helps with the costs including travel that people incur when they are required to attend an Artificial Limb Centre to have an artificial limb fitted, adjusted or repaired. In some cases assistance can also be provided for the cost of an attendant.
What eligibility criteria apply?	Civilian Amputee Assistance is not income or asset tested. Where can I find out more? <ul style="list-style-type: none"> <li>For more information contact Work and Income either: <ul style="list-style-type: none"> <li>Through their website: <a href="http://www.workandincome.govt.nz/">http://www.workandincome.govt.nz/</a> · On the free call number: 0800 559 009</li> <li>Or by visiting your local Work and Income Office.</li> </ul> </li> </ul>

**Table 6.9 Ministry of Social Development – Other transport assistance**

What other types of assistance for travel	People with disabilities that require one-off assistance for travel costs may be able to receive assistance, such as a Special Needs Grant, an Advance Payment of Benefit or
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costs are provided by the Ministry for Social Development?	Recoverable Assistance Payment where: <ul style="list-style-type: none"> <li>• they meet an income and asset test . the travel is immediate and essential</li> <li>• they are unable to meet the cost through their own resources or other sources (such as funding from other agencies)</li> </ul>
Where can I find out more?	For more information contact Work and Income either: <ul style="list-style-type: none"> <li>· Through their website: <a href="http://www.workandincome.govt.nz/">http://www.workandincome.govt.nz/</a> · On the free phone number: 0800 559 009</li> </ul> Or by visiting your local Work and Income Office.

**Table 6.10 District health boards – National travel assistance**

What is National Travel assistance?	The National Travel Assistance Policy (NTA) of District Health Boards reimburses the cost of travel for eligible clients and their support people to specialist health and disability services The national travel assistance is for travel to publically funded health or disability specialists, and the person must be referred by another publicly funded specialist health or disability service. What eligibility criteria apply? People must be referred by a publicly funded health or disability specialist (not their General Practitioner or primary health care provider or a private specialist). The eligibility criteria are: <ol style="list-style-type: none"> <li>1. For a child under 18                         <ul style="list-style-type: none"> <li>· Travel per visit over 80 kilometres or more one way</li> <li>· attend more than 22 visits in two months</li> <li>· attend more than five visits in six months, and travel per visit 25 kilometres or more one way</li> <li>· hold a Community Service Card and travel per visit 25 kilometres or more one way</li> </ul> </li> <li>2. For an adult                         <ul style="list-style-type: none"> <li>· Travel per visit over 350 kilometres or more one way</li> <li>· attend more than 22 visits in two months</li> <li>· attend more than five visits in six months, and travel per visit 50 kilometres or more one way</li> <li>· hold a Community Service Card and travel per visit 50 kilometres or more one way</li> </ul> </li> </ol>
Where can I find out more?	You can speak to your specialist health or disability provider, DHB coordinator or social worker or Contact the Ministry of Health: <ul style="list-style-type: none"> <li>· Through its website : <a href="http://www.health.govt.nz/yourhealth-topics/healthcare-services/hospitals-and-specialist-services/travel-assistance">http://www.health.govt.nz/yourhealth-topics/healthcare-services/hospitals-and-specialist-services/travel-assistance</a></li> <li>· On the free phone number: 0800 281 222 (option 2)</li> </ul>

**Table 6.11 District health boards – Residential Care and support subsidies**

What are the Residential Care and Support subsidies?	These are funded by District Health Boards and the Ministry of Health for different eligible groups. The Ministry of Health centrally funds residential support services for people with physical, sensory and intellectual disabilities who are under 65. The Ministry specifies what services will be provided for a person, and contracts for these services. DHBs fund residential care and support subsidies for people with mental illness and addictions, and chronic health conditions and people 65 or older and people 50-64 assessed as having needs similar to older people, who can no longer live
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	<p>independently at home. Generally they will be accommodated in a DHB contracted facility such as a rest home or continuing care hospital.</p> <p>The Ministry of Health funds residential support subsidies for people under 65 with a long-term physical sensory or intellectual disability, a chronic health condition or a mental illness or addiction, who is assessed as needing long-term residential care.</p> <p>If the person is receiving a benefit and once all other option for care have been explored they may receive a government subsidy to access residential services in a home or facility contracted by the Ministry or a DHB.</p> <p>Most residential care providers are funded to transport for residents to other health providers from the care facility for medical appointments. There may also be some additional transport assistance for those over 65. People receiving Residential care or support subsidies may also be eligible for the Disability Allowance for transport costs not covered in their residential contract or by national travel assistance.</p> <p>The residential care and support subsidies are not available to people living independently in flats, their own home, or in their own unit in a retirement village.</p>
What eligibility criteria apply?	<p>For residential care people must be needs assessed by the DHB, a care coordinator or a needs assessment and service coordination organisation to determine:</p> <ul style="list-style-type: none"> <li>· whether or not the person has a condition that can be reversed;</li> <li>· whether or not the person can be safely supported in the community; or</li> <li>· if the person needs long-term residential care indefinitely, what level of care is needed in a rest home or hospital.</li> </ul> <p>Those under 65 must be on a benefit to receive the subsidy.</p> <p>The Residential Care Subsidy can then be applied for through Work and Income. Access to the Residential Care Subsidy is subject to income and asset testing by Work and Income. People over 65 receiving the Residential Care Subsidy make a contribution to the cost of their care from their Superannuation.</p> <p>People over 65 assessed as not eligible for the Residential Care Subsidy may still receive a top up of the cost of living in a residential care facility.</p>
Where can / find out more?	<p>Contact the Ministry of Health:</p> <ul style="list-style-type: none"> <li>· Through its website: <a href="http://www.health.govt.nz/our-work/life-stacies/healtholder-people/long-term-residential-care">http://www.health.govt.nz/our-work/life-stacies/healtholder-people/long-term-residential-care</a></li> </ul> <p>On the free phone number: 0800281 222</p> <p>Or contact your local Work and Income New Zealand Office</p>

**Table 6.12 District health boards – Vehicle modification and vehicle purchase assistance**

What is vehicle modification and vehicle purchase assistance?	<p>The Ministry of Health, through Disability Support Services, funds Equipment and Modification Services for eligible people of all ages, including modifications to vehicles and very limited vehicle purchase assistance for those who meet access and eligibility criteria. Maximum amounts of funding are available for both modifications to a vehicle and for the purchase of a vehicle and funding can only be applied for following an assessment by a suitably qualified occupational therapist.</p>
What eligibility criteria apply?	<p><b>Vehicle Modification</b></p> <p>Funding for vehicle modifications will be considered for disabled drivers (16 years and over) where it is essential for the person to have a modified vehicle to do one of the following and no other viable options are available to them:</p> <ul style="list-style-type: none"> <li>get to/from or undertake their full time employment</li> <li>get to/from tertiary education or vocational training</li> <li>· undertake their role as the main carer of a dependent child or children</li> </ul> <p>Examples of modifications include hand controls, seating, ramps or hoists and safe ways of transporting a wheelchair. The person must be the intended driver of the vehicle, have a minimum of a Learner Licence to drive a vehicle and either own the vehicle (or intend to purchase a vehicle) or be an employee of an organisation that provides a vehicle for their</p>

	<p>use.</p> <p>Additional support is available for disabled passengers 16 years and over where they:</p> <ul style="list-style-type: none"> <li>· are a passenger who is unable to drive because of their disability</li> <li>· need a modified vehicle to travel safely to meet their full time employment or educational requirements (as above), and</li> <li>· have no other viable options available to them. They must always have someone who is available to drive the vehicle for them.</li> </ul> <p>Funding for vehicle modifications will be considered for families of disabled children aged 15 years or under if the modifications are essential for the safe travel of their child. Examples of modifications are safety restraints, ramps or hoists and safe ways of transporting wheelchairs.</p> <p>The vehicle must be owned by:</p> <ul style="list-style-type: none"> <li>· a family or whanau member who is the main carer of the child and lives with them full-time.</li> <li>· a foster family member who is the main carer of the child on a long term basis i.e. a minimum of 2-3 years.</li> <li>· Child, Youth and Family, if this service has provided a vehicle for a child so that a foster family can transport a disabled foster child in their care.</li> </ul> <p><b>Vehicle Purchase</b></p> <p>When access to alternative transport is not a viable option, a disabled person (16 years or over) may be able to receive a one off grant up to a maximum set by the Ministry of Health towards the purchase of a vehicle to be modified. To qualify for assistance, they must need a vehicle to get to and from their work, tertiary study or vocational training, or fulfil their role as main carer of a dependent child who lives with them.</p> <p>The availability of this funding will depend on the person's financial situation (they and any partner or spouse will need to have an income and cash asset test carried out by Work and income), as well as their reasons for needing a vehicle.</p> <p>In some cases the Individuals with Disabilities Subcommittee, Lottery Grants Board may provide some funding for vehicle purchase and modifications instead of or in addition to funding available from the Ministry of Health</p>
Where can I find out more?	<p>More information can be found from the Ministry of Health:</p> <ul style="list-style-type: none"> <li>· Through their website: <a href="http://www.health.govt.nz/yourhealth-topics/disabilityservices/equipment-and-modification-services">http://www.health.govt.nz/yourhealth-topics/disabilityservices/equipment-and-modification-services</a></li> </ul> <p>On its free phone number: 0800 281 222</p>

**Table 6.13 Accident Compensation Corporation – Transport assistance**

What is Accident Compensation Corporation (ACC) transport assistance?	ACC pays non-emergency transport costs associated with treatment for people who have been injured as a result of an accident, and to enable people injured as a result of an accident to maintain employment.
What can ACC transport assistance be used for?	<p>The transport must be necessary and appropriate because of the nature of the client's injury.</p> <p>The client must have cover for the injury for which the service or treatment is being provided.</p> <p>The purpose of the travel is to get to rehabilitation services, to receive treatment or be assessed and to get to work to maintain employment.</p>
What eligibility criteria apply?	<p>The travel from the start to the nearest appropriate rehabilitation provider, must exceed 20km in a single, one-way trip within 14 days of the injury, or more than 80km in total in one calendar month.</p> <p>When travelling by scheduled public transport the cost of the transport must be more</p>

	<p>than \$46 within the calendar month or the client must have prior approval.</p> <p>Travel must be for:</p> <ul style="list-style-type: none"> <li>· Emergency transport of injured person and escort within 24 hours of the injury (or the person with the injury being found)</li> </ul> <p>Non-emergency transport (non-ambulance) prior to admission</p> <p>Emergency transport of injured person and escort within 24 hours</p> <ul style="list-style-type: none"> <li>· Inter-hospital transfers within 24 hours because of specialist treatment requirements (i.e. specialist level of treatment required that is not normally available at DHB)</li> <li>· Non-emergency transport for the injured person (and family/support person) to travel to and from the DHB for treatment at medical outpatients (after a 6 week period following admission to hospital, within this six week period it is covered by the DHB) and non-medical outpatient services.</li> <li>· Non-emergency transport and other travel assistance for injured person (and support person/escort) for hospital visits associated with elective admissions</li> </ul>
<p>Where can I find out more?</p>	<p>Contact your local ACC Office for more information</p>

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## Appendix E Total Mobility sections from the guidelines for the development of regional public transport plans

### 5.1 Description of services

...

*In addition to conventional public transport services, the RPTP must also include the taxi or shuttle services that it intends to provide financial assistance to (including Total Mobility schemes)*

*The level of detail provided about Total Mobility will need to be considered to give a clear idea of what is intended, but provide sufficient flexibility. As a minimum the RPTP should state the areas of operation, any exemptions to 24 hour operation, eligibility criteria (as described in the Ministry of Transport Total Mobility Review) and discount levels available for total mobility schemes or any other subsidised taxi and shuttle based services. NZTA recommends that included here is a statement about how and when the recommendations of the Ministry of Transport Total Mobility Review have or will be implemented.*

...

### 5.2 Assisting the transport disadvantaged

...

#### 5.2.1 Total Mobility Services

*The Total Mobility Scheme is one way that the needs of some transport disadvantaged people can be met.*

*The RPTP must include Total Mobility, consistent with the information provided in these guidelines.*

*The Total Mobility Scheme provides a subsidised taxi service for disabled people with serious mobility constraints by way of taxi vouchers that provide a discount of 50 percent off the normal taxi fare. The scheme also provides funding to purchase and install wheelchair hoists in taxi vans. The purpose of the scheme is 'to assist eligible people with impairments to access appropriate transport to enhance their community participation. This assistance is provided in the form of subsidised door-to-door transport services wherever transport providers operate'.*

#### *Eligibility criteria*

*To qualify for Total Mobility assistance people must meet eligibility criteria, these criteria are nationally consistent to ensure equity for all scheme users. An eligible person must have an impairment that prevents them from undertaking any one or more of the following five components of a journey unaccompanied, on a bus, train or ferry in a safe and dignified manner:*

1. *Getting to the place where the transport departs*
2. *Getting onto the transport*
3. *Riding securely*
4. *Getting off the transport*
5. *getting to the destination*

*People with impairments who meet the criteria for the scheme and are able to use bus, train or ferry services some of the time, but not all of the time, should be eligible for the scheme (e.g. people with impairments such as epilepsy or arthritis).*

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

...

#### **5.4 Public transport service policies**

...

##### **5.4.2 National Total Mobility Policy**

*All policies contained within the RPTP must be consistent with the following national policies:*

- *The fare subsidy is set at 50% for all trips.*
- *The scheme has no minimum fare threshold.*
- *There are no restrictions on the purpose of the trip for the scheme, except at the discretion of the regional council where this trip should be the responsibility of another government agency, such as the Ministries of Education, Health or Social Development.*
- *One of the main methods of managing Total Mobility expenditure is through the establishment of a maximum subsidised fare. The maximum subsidised fare must be negotiated with NZTA, taking into account the New Zealand Travel Survey and must be reviewed every three years. There is no minimum fare threshold and town boundary restrictions should not apply.*
- *Any review of the RPTP should include investigations into the potential for other types of transport providers to participate in the scheme. The review process should also consider the inclusion of contracting taxi services operating in areas that are not currently covered by the Total Mobility*

*Scheme, although this will be subject to local willingness to contribute to the scheme through property rates or other means.*

*Further information on these policies is provided in the Total Mobility Scheme – A Guide for local authorities.*

*The RPTP should include a policy for procuring the equipment required for wheelchair accessible taxis.*

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## Appendix F Contract and terms and conditions from Greater Wellington Regional Council

The following sample contracts and terms and conditions have been provided by Greater Wellington Regional Council. Please note formatting has been modified for the purpose of this report.

### F1 Client terms and conditions (March 2013)

#### General

1. The Total Mobility Scheme (the Scheme) provides subsidised transport via taxi or specialist private hire services for people who cannot manage public transport due to their permanent disability or impairment. The Scheme is administered by Greater Wellington Regional Council (GW).
2. By accepting and using your Scheme photo identification card (photo ID card) and/or using any Scheme vouchers, you are agreeing to these terms and conditions as varied from time to time. Please read them carefully and keep this form for your records.
3. If you fail to adhere to these terms and conditions, knowingly provide misleading or false information with respect to the Scheme, or fail to notify GW of any misuse of the Scheme, you risk cancellation of your photo ID card and/or withdrawal of the Scheme benefits and may, at the option of GW, face legal proceedings.

#### Conditions of Use

4. You must be a current registered member of the Scheme.
5. You must not allow anyone else to use your photo ID card.
6. You must notify GW if you lose or misplace your photo ID card, or when you are aware or suspect your photo ID card is being used by someone other than yourself.
7. Transport must be booked through a registered transport operator unless you are taking a registered transport operators taxi off of a taxi stand. A list of registered transport operators is provided over the page with these terms and conditions.
8. You are not permitted to make direct arrangements with, or contact individual drivers to book your travel unless you are arranging a return trip with the driver initially sent to you by the registered transport operator.
9. If your transport is being provided by a family member (including extended family) or a close associate, then the Scheme is not able to be used. For example; if your husband, wife or family friend is a taxi driver and you travel in their taxi, you cannot use the Scheme to reduce the amount of any fare that is charged. If you wish to use the Scheme then you must use another driver who is not a family member or close associate, from a registered transport operator.
10. You must show your photo ID card to the driver at the start of every trip. Failure to do so may result in you having to pay the full fare.
11. You must ensure the driver returns your photo ID card at the completion of each one way trip. Never leave your photo ID card with a driver.

12. If your travel is being paid for or part-paid for by an organisation other than GW then your travel may not be eligible for the Scheme. In these instances you must contact GW on 04 801 7000 to discuss your travel requirements.
13. You may not use the Scheme for any travel in the course of your employment, or self-employment where the cost could be considered a business expense of yours, or your employers.
14. The maximum allowable period of waiting time that you may ask a driver to wait for you (that is whilst not travelling and not in traffic) to conduct your business either inside or outside the vehicle during any one trip is 5 minutes.
15. You must remain present in the vehicle for the entire duration of your trip, except where you have requested a driver to wait up to a maximum of 5 minutes for you whilst you conduct your business.
16. You must pay your share of the fare before exiting the vehicle. The maximum amount that GW will pay is 50% of the total fare or \$40.00, whichever is the lesser amount. Where your fare is payable on account by invoice, then the invoice must be presented to you by the registered transport operator, and not any individual driver.
17. You must obtain a receipt from the driver, and check that the amount you have paid is shown on the receipt. If the receipt amount shows more than you have paid, please contact GW on 04 801 7000 for advice.
18. You may take travelling companions with you when you travel, but you must remain with your companions for the entire duration of the trip that is being paid for using the Scheme
19. You must meet all requirements of any regional council in whose geographical area you travel; including any requirement to use Scheme vouchers. You are responsible for ensuring you have vouchers for travel outside the region. Vouchers can be obtained by calling 04 801 7000.
20. You must advise GW by calling 04 801 7000 if any of the following occur:
  - a. Your photo ID card is lost or stolen
  - b. Your address changes
  - c. Your circumstances change, for example; you require the ongoing use of a wheelchair accessible vehicle rather than a standard car
  - d. There is any other change of circumstances that may affect your eligibility for the Scheme
  - e. You are aware of any misuse or potential misuse of the Scheme
21. Under the Privacy Act 1993, you have the right to access your personal information held by GW. You are also entitled to request information about you to be corrected. Only GW Total Mobility staff and supporting agency staff will have access to personal information. This may however be shared with the New Zealand Transport Agency or Audit New Zealand if audits of the Scheme are conducted.
22. GW may change, at any time and without prior notice, these Client Terms and Conditions of Use. The current version of these Client Terms and Conditions of Use will be maintained on the GW website. GW is not obliged to notify you of any changes. We recommend you review the GW website from time to time for changes.

### **Registered Transport Operators**

Not all transport operators are eligible to provide Scheme services.

To receive the Scheme discount you must use one of the following transport operators in the list on this page, or at the following website address: <http://www.gw.govt.nz/total-mobility-operators/>.

Transport Operator	Phone
Airport & City Shuttles	04 977 7406
Driving Miss Daisy	0800 948 432
Hutt & City Taxis Ltd	04 570 0057
Kiwi Cabs Ltd	04 389 9999
Masterton Radio Taxis Ltd	06 378 2555
Overland Taxis Ltd (Porirua)	04 237 9999
Paraparaumu Taxis Ltd	04 296 1111
Porirua Taxis Marketing Ltd	04 237 6099
Rideshop Ltd (Masterton)	06 377 4231
Wellington Combined Taxis Ltd	04 384 4444

#### Need more information?

Please contact the GW Total Mobility team on 04 801 7000.

#### Frequently asked questions

*Are wheelchair accessible vans covered by Total Mobility?*

Yes.

*Can I travel with a companion?*

Yes.

*How do I use my Total Mobility photo identification card?*

You must show your Total Mobility photo ID card to the driver every time you use a Total Mobility service. The driver will check your identification at the start of the trip and calculate your share of the fare at the end of the trip. Make sure you get your card back before leaving the vehicle.

*Can my caregiver do the shopping and use my Total Mobility photo identification card?*

No, only members of the Total Mobility Scheme can use Total Mobility services.

*Can I use Total Mobility outside the Wellington region?*

Yes, you will need to phone 04 801 7000 at least 7 days prior to your travel for a supply of Total Mobility vouchers to use while outside the region.

*What if my Total Mobility photo identification card is lost or stolen?*

You will need to phone 04 801 7000 for a new card. You don't need to send us a new photo but you may be charged a replacement card fee.

*Can I use my Total Mobility photo identification card in any taxi?*

No, not all taxi, shuttle or private hire services provide Total Mobility services. Please call one of the registered transport operators listed opposite, or listed on our website at <http://www.gw.govt.nz/total-mobility-operators/>

*Why do I need a receipt from the driver?*

Issuance of a receipt ensures that neither you nor GW is charged the incorrect fare. Please check that the amount on the receipt is the amount you have paid - If you are unsure about the amounts appearing on your receipt, or if the total amount differs from the amount shown on the taxi-meter or a pre-agreed fare then please phone 04 801 7000 for advice.

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## F2 Driver terms and conditions (March 2013)

### Total Mobility Scheme: Driver Terms and Conditions of Access

#### 1. General

- a. The Total Mobility Scheme (the Scheme) provides subsidised transport by taxi (Approved Taxi Operators) or specialist private hire service providers (Private Hire Service Providers) for people who cannot manage public transport due to their permanent disability or impairment (Scheme Client). This means Scheme Client's receive subsidised fares.
- b. The Scheme is administered and monitored in the Wellington region by Greater Wellington Regional Council (GWRC). Approved Taxi Operators and Private Hire Service Providers (in each case, the "Transport Operator") and accordingly their Drivers must comply with the contract relating to the Scheme between the GWRC and the Transport Operator. The terms of that contract prevail over these Total Mobility Scheme: Driver Terms and Conditions of Access in the event of any inconsistency.
- c. Each time a Scheme Client travels using the Scheme, a trip (Trip) is recorded in GWRC's Total Mobility Electronic System (TMES). Unless the Transport Operator is otherwise notified, the maximum amount that GWRC will pay towards a single Trip is 50% of the total fare (which for private hire services means the "agreed cost of travel" under the Transport Operator contract) payable for the Trip or \$40, whichever is the lesser amount (Subsidy).
- d. In accordance with Section 11 of these Driver Terms and Conditions of Access, GWRC reserves the right to vary the terms of the Subsidy and any aspect of the Driver Terms and Conditions of Access at any time and at its sole discretion.
- e. The Transport Operator's claim for the Subsidy through the use of the TMES, and any manual vouchers processed, can only be made subject to your compliance with these Driver Terms and Conditions of Access.
- f. You may not discount the fare payable by the Scheme Client. The fare payable by the Scheme Client must be calculated with the in-taxi meter in accordance with the fare schedule you are bound by, or in the case of Private Hire Service Provider, the pre-agreed fare.
- g. The TMES is maintained daily, ie new Scheme Clients are added, new electronic photo identification smartcards (Photo ID Cards) issued by GWRC, and lost Photo ID Cards hot-listed. It is very important that your in-vehicle payment terminal (TMES Equipment) recognises these daily changes – therefore you must log off your TMES Equipment daily and log on at the start of each new shift in order to recognise new and updated Photo ID Cards. Note that Photo ID Cards do not have an expiry date.
- h. GWRC reserves the right to withhold payment of any Subsidy to a Transport Operator if it considers a failure to comply with these Driver Terms and Conditions of Access has occurred. GWRC does not pay the subsidy to the Driver and Driver payment is a matter between the Transport Operator and the Driver.
- i. You should be aware that failure to comply with these Driver Terms and Conditions of Access may result in you permanently being removed from access to the Scheme.
- j. You should also be aware that deliberate input of incorrect information into TMES systems, misuse of a Scheme Client's electronic Photo ID Card or any other misuse or

abuse of the Scheme may result in legal proceedings being brought against you, and recovery of any Subsidies paid to you or the Transport Operator.

- k. Please note also that acceptance by signature of these Driver Terms and Conditions of Access is mandatory if you wish to access the Scheme. Your signature at the bottom of this form acknowledges this and is your undertaking to abide by the Driver Terms and Conditions of Access.
  - l. GWRC reserves the right to undertake any investigation method it considers necessary in order to verify the authenticity of any Trip or Subsidy claim. This includes accessing any records held by you or any company that you are employed by, contract to or are a shareholder / director of.
  - m. GWRC expects drivers to offer a level of service which enables people with disabilities to safely manage their travel such as opening car or van doors to assist them in and out of the vehicle, and to minimise the walking distance from vehicle to destination where possible.
  - n. A maximum waiting time of five (5) minutes spent with the meter on after the Scheme Client has entered the vehicle and the Trip has commenced is permitted in the course of a single Trip (Waiting Time). Waiting Time is further explained in Section 4 of these Driver Terms and Conditions of Access.
  - o. All Trips recorded in the TMES are to be single one-way Trips, where the origin and destination are two separate locations. Time spent between the completion of one Trip and commencement of another for the same Scheme Client cannot be considered as Waiting Time. Recording of Trips is explained further in Sections 2 and 4 of these Driver Terms and Conditions of Access.
2. Before you undertake a Trip for a Total Mobility Scheme Client
- a. You must ensure the Scheme Client has a Photo ID Card before commencing any Trip.
  - b. You will not undertake Trips for a Scheme Client where either the Scheme Client has contacted you directly in any form other than as described in Section 2(c) of these Driver Terms and Conditions of Access; or where you have contacted the Scheme Client directly.
  - c. Other than as described in Section 2(d) of these Driver Terms and Conditions of Access, all Trips for a Scheme Client must be allocated to you through booking and dispatch systems in place with the Transport Operator you are employed by, contract to or are a shareholder/director of (Allocated Trip), except where you have completed an Allocated Trip and the Scheme Client requests a return trip on the same day from you (a Return Trip). A Return Trip is limited to one (1) Trip per Scheme Client per day.
  - d. You may undertake Trips for a Scheme Client where the Scheme Client has hailed you from a designated taxi stand (Hailed Trip), but not any other location other than the Allocated Trip or Return Trip pick-up address.
  - e. Under no circumstances must a Trip be entered into TMES when another organisation (in other words, not the Scheme Client) is paying for the travel, for example: a rest home, the Accident Compensation Corporation, or Workbridge etc. In other words, if the Scheme Client is not paying for the Trip, they are not able to use the Scheme. This means that you are not able to claim a Subsidy against the Scheme including any extra payments for use of a wheelchair hoist (Hoist Fee). Where you are presented with a GWRC Supported User voucher other rules apply, see Section 8 of these Driver Terms and Conditions of Access.

- f. Under no circumstances must a Trip ever be entered into TMES where a Trip has not occurred.
- g. The Scheme Client must always be present in your vehicle, except where Waiting Time as described in Sections 1 and 4 of these Driver Terms and Conditions of Access occurs. This means:
- i. You may not act as a courier to pick up parcels, family members or friends etc without the Scheme Client present in your vehicle;
  - ii. Your Subsidy may only be claimed for the portion of travel the Scheme Client was in the vehicle. For example you may not pick up a non-Scheme client at point A, proceed to point B to pick up the Scheme Client and then claim a Subsidy for the entire journey once you reach the destination.
3. Accepting and processing Total Mobility Scheme Clients' electronic Photo ID Cards
- a. You must check the photo on the Photo ID Card to ensure the correct Scheme Client is using the Photo ID Card.
  - b. If a Scheme Client does not present their Photo ID Card, they are not eligible for a Subsidy and you are not able to claim a Subsidy through the Scheme (this includes any manual claim). This applies to any Scheme Clients from other parts of the country, who will have a Photo ID Card issued by their relevant Regional Council. In some circumstances their Photo ID Card may not be electronic and if so they will also need to present a voucher.
  - c. You must not keep a Scheme Client's Photo ID Card in your possession under any circumstances and you must return it to the Scheme Client at the end of each Trip.
  - d. Only one Photo ID Card can be used per Trip to claim the Subsidy regardless of how many Scheme Clients are travelling – see Section 7 of these Driver Terms and Conditions of Access for conditions in relation to payment of Hoist Fees when either one or more Scheme Clients are travelling in wheelchairs.
4. Completing and recording the Trip
- a. The GWRC Scheme Client's Photo ID Card must be 'tagged' by holding it to the smart card reader on the TMES Equipment at the start of the Trip. This action registers the Trip start time, and verifies that the Photo ID Card is valid.
  - b. If the Photo ID Card is not recognised as valid by the TMES Equipment you must return the Photo ID Card to the Scheme Client and advise them to contact GWRC (GWRC's contact telephone number is printed on the Photo ID Card). The Scheme Client will be required to pay a full fare if their Photo ID Card is invalid.
- Note: to be sure a Photo ID Card is not valid, you must have logged on your TMES Equipment that day as described in Section 1 of these Driver Terms and Conditions of Access.*
- c. As described in Section 1 of these Driver Terms and Conditions of Access, Waiting Time en route to a destination is limited to a maximum of five (5) minutes; therefore any time spent waiting for a longer period will require the completion of separate Trips. If you choose to provide extra assistance to Scheme Clients such as taking groceries to their door or waiting for a period greater than five (5) minutes then you must do this in your own time, and not at a cost to the Scheme by claiming a Subsidy that includes allowance for the time spent providing that extra assistance.

- d. The meter must be closed immediately on the completion of each Trip, with fare calculation taking place in accordance with the fare schedule you are bound by (or in the case of a Private Hire Service Provider, the pre-agreed fare) whilst the Scheme Client is in the Vehicle.
- e. The meter is not to record any time after reaching the destination; in other words any time spent unloading any passenger luggage or deploying a wheelchair hoist is not to be included in any fare calculation.  
*Note: any time spent at the destination is not considered Waiting Time.*
- f. On calculation of the fare you must then enter Trip, fare, origin zone and destination zone information into the TMES Equipment whilst the Scheme Client is in the Vehicle.
- g. You must issue a receipt at the end of each journey and return the Photo ID Card to the Scheme Client. Note this also applies when a Scheme Client has requested a Return Trip, where two separate receipts will be issued – one each for the Allocated Trip and Return Trip.
- h. No extra charges are to be imposed (or Subsidy claimed) for transporting walking frames, manual wheelchairs or additional passengers other than those published in any fare schedule you are bound by.
- i. The Scheme Client must pay 50% of the total fare together with any amount that exceeds the Subsidy.
- j. If you realise you have entered a fare amount into the TMES Equipment incorrectly and it is too late to cancel the transaction and re-enter it, you must notify your Transport Operator administrator to correct the error as soon as possible.

5. What to do if your TMES Equipment does not work

- a. In the event that your TMES Equipment fails you must follow the steps detailed in Appendix 1 of these Driver Terms and Conditions of Access.

6. Carriage of your own family members or close associates

- a. You may not claim any Subsidy if transporting any of your own family members or close associates. In other words, when transporting a family member or close associate who is a Scheme Client, payment of the total fare is a matter between you, and not something the Scheme is there to subsidise.
- b. In this context, a family member or close associate is a person who is part of a group of people affiliated through a shared relationship, affinity, or co-residence. This includes extended family.

7. Payment of Hoist Fees (GWRC Registered Wheelchair Hoist Equipped Vehicle Operators only)

- a. A Hoist Fee may only be claimed by the Driver under the Scheme where:
  - i. The Scheme Client has a Photo ID Card; and requires the use of a wheelchair hoist to get into the vehicle; and
  - ii. The Driver uses a wheelchair hoist equipped vehicle certified and registered with GWRC under the Scheme.
  - iii. The fare calculated does not include any time spent assisting the Scheme Client out of the vehicle on completion of the Trip.

- b. Additional Hoist Fees may be charged by the Driver when two or more Scheme Clients require use of a wheelchair hoist during the course of one Trip. Each wheelchair hoist using Scheme Client must present their Photo ID Card - the process used to record this in the TMES Equipment is detailed in Appendix 2 of these Driver Terms and Conditions of Access.
- c. If a Scheme Client does not require a wheelchair hoist equipped vehicle but you are providing their transport with one you are not able to claim a Hoist Fee should you deploy the hoist. For example;
  - i. A Scheme Client has ordered a standard sedan but a GWRC registered wheelchair hoist van has been sent and the hoist deployed because the Scheme Client has difficulty using the steps up into the van. Because a standard sedan would have met their needs, a Hoist Fee can not be claimed.

#### 8. Auckland Region Photo ID Cards

- a. Total Mobility clients from the Auckland region will also present an electronic Photo ID Card. This Photo ID Card can be processed via the magnetic stripe reader (not the smart card reader) on your TMES Equipment.

#### 9. Paper vouchers from other regions

- a. There are two types of vouchers which must be accepted.
  - i. Other region vouchers - Scheme Clients from other regions outside of Wellington and Auckland visiting Wellington will present vouchers issued by their region as well as their Photo ID Card. These vouchers entitle the user to the same Subsidy as a local Scheme Client. You must ensure that you record the client's name and Total Mobility ID Card number on the voucher if the Scheme Client has not done so.
  - ii. GWRC vouchers for Supported Users (Blue Vouchers) - these vouchers allow the Scheme Client to travel without paying a fare. The Subsidy remains at 50% of the total fare payable for the Trip or \$40, whichever is the lesser amount.

#### 10. Rules for Scheme Clients you must be aware of

- a. Scheme Clients are not permitted to present their Photo ID Cards for business related travel ie: employer paid Trips. If you are aware that this is occurring and wish to avoid conflict with a Scheme Client you may accept the Photo ID Card, but are requested to contact GWRC on 04 801 7000 with the Scheme Client's Photo ID Card and fare details.
- b. If you become aware that a Scheme Client's travel is subsidised by any other means then you are requested to contact GWRC on 04 801 7000 with the Scheme Client's Photo ID Card and fare details.
- c. Scheme Clients are required to undertake their Trips as soon as possible after any pre-arranged Trip commencement time, to avoid any unnecessary waiting. Please advise GWRC on 04 801 7000 if your experience is that any Scheme Client does keep you waiting an unreasonable amount of time beyond pre-arranged Trip commencement time.

*Please note that any information provided to GWRC will be treated in the strictest confidence.*

#### 11. Changes to and benefit of these Terms and Conditions

- a. GWRC may vary, at any time, upon prior notice (either to you directly or the Transport Operator you contract to) these Driver Terms and Conditions. You are not obliged to

accept these changes but if you continue to transport Scheme Clients subsequent to any changes to Terms and Conditions then you will be deemed to have accepted those changes.

- b. These 'Total Mobility Scheme: Driver Terms and Conditions of Access' are intended to be for the benefit of, and enforceable by, Greater Wellington Regional Council and your Transport Operator for the purposes of the Contracts (Privity) Act 1982.

12. Declaration

I .....(Driver or Driver Entity Name) have read and understood these Total Mobility Scheme; Driver Terms and Conditions of Access (together with any variations notified to me by GWRC) and agree to abide by them.

I understand that failure to adhere to the Total Mobility Scheme; Driver Terms and Conditions of Access or my misuse of the Scheme may result in my access to the Total Mobility Scheme and/or that of the Transport Operator I contract to being permanently withdrawn by GWRC.

I also understand that my failure to adhere to the Total Mobility Scheme; Driver Terms and Conditions of Access or my misuse of the Scheme may also result in GWRC reporting my actions to the New Zealand Police, and the New Zealand Transport Agency or any successor organisations, which may result in legal proceedings being brought against me and/or the Transport Operator I contract to.

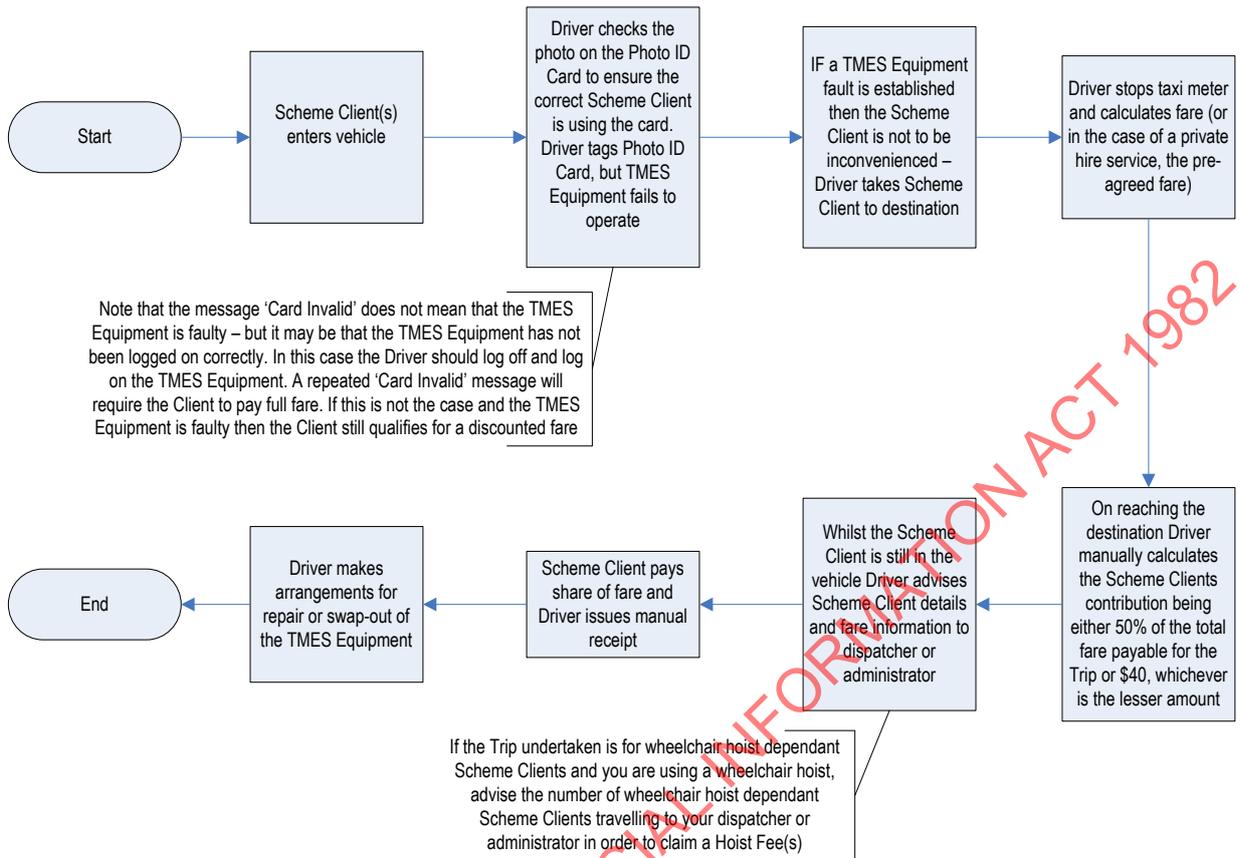
Driver Signature..... Date .....

(where the Driver is not an individual these terms and conditions must identify the name of the Driver entity and be signed by a director or authorised signatory of such Driver entity)

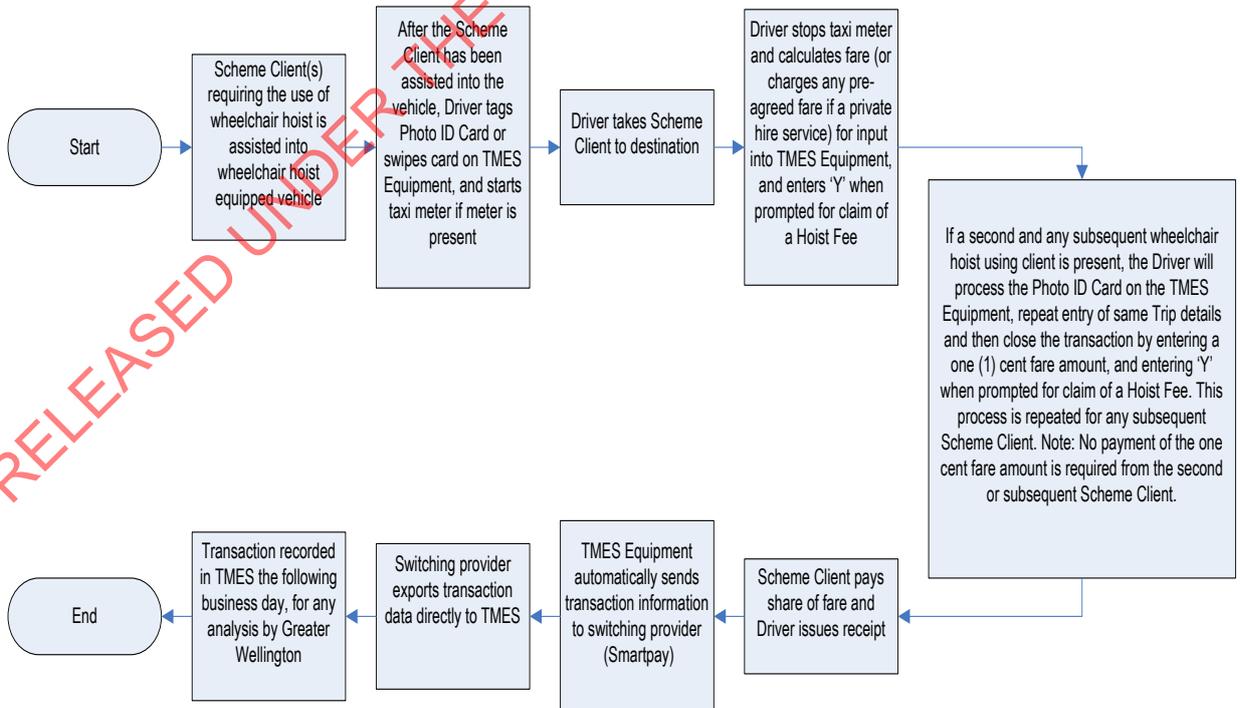
Driver Unique ID.....

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**Appendix 1 – Manual Back-up Process**



**Appendix 2 – Processing of Multiple Hoist Fees per Trip**



F3 Transport operator standard contract (March 2013)

**Agreement for the Provision of Total Mobility Transport Services**

**Between**

**Greater Wellington Regional Council**

**And**

**<name>**

**Contract PT <number>**

**Contents**

1. Purpose.....

2. Definitions and interpretation.....

3. Nature of the Agreement.....

4. Contractor obligations.....

5. Variations.....

6. Greater Wellington's obligations.....

7. Health and safety.....

8. Payments.....

9. Indemnity and Insurance.....

10. Operational and Administrative Audits.....

11. Information.....

12. Confidentiality.....

13. The Total Mobility Electronic System.....

14. Force Majeure.....

15. Dispute Resolution.....

16. Termination.....

17. Notices.....

18. Miscellaneous.....

Executed as an agreement.....

Schedule 1: Services provided by the Contractor.....

Schedule 2: Fees and Invoicing.....

RELEASED UNDER THE OFFICIAL INFORMATION ACT 1982

<b>Schedule 3: Driver Training Standards</b> .....
<b>Schedule 4: TMES Guidelines and Procedures for Contractors</b> .....
<b>Schedule 5: Terms of Use for users of the Total Mobility Electronic System</b> .....
<b>Schedule 6: TMES Equipment</b> .....
<b>Schedule 7: TMES Equipment Set-up Process</b> .....
<b>Schedule 8: Driver Terms and Conditions of Access to the Total Mobility Scheme</b> .....

## Agreement

dated

&lt;year&gt;

### Parties

Wellington Regional Council, a local authority and regional council under the Local Government Act 2002, trading as Greater Wellington Regional Council (Greater Wellington)

<name>, a company incorporated and existing under the laws of New Zealand with its registered office at <address>; registered by the Registrar of Companies under the Company Number <number> (Contractor).

### Background

- a) Greater Wellington has certain statutory responsibilities for the control and provision of public transport services.
- b) Greater Wellington provides discounted travel for people with permanent disabilities or impairments through funding and administering the Total Mobility Scheme (**Scheme**).
- c) A client of the Scheme is any person with a permanent disability or impairment who has been assessed by Greater Wellington as eligible to use the Scheme (**Client**) and issued with an electronic photo ID card (**Photo ID Card**).
- d) The funds for these discounts are drawn from the regional transport rate paid by ratepayers and from New Zealand Transport Agency (**NZTA**) funds. Greater Wellington is accountable for the proper use of these funds.
- e) Greater Wellington makes the Scheme available to Clients through a number of agencies and transport operators and relies on those agencies and transport operators to ensure that the conditions for participation and use are observed.
- f) Scheme Services are delivered by Approved Taxi Organisations) or Private Hire Service Providers.
- g) Greater Wellington's subsidy of a Client's fare for the transport which as at the Commencement Date is a maximum for any single Trip of the Subsidy.
- h) Greater Wellington reserves the right, at any time, upon prior notice to the Contractor to vary the Subsidy and any other aspect of the Scheme.
- i) Greater Wellington is required to ensure that the Scheme is used effectively and efficiently for the benefit of the greatest number of Clients and minimise opportunities for abuse under the Scheme. Greater Wellington believes that understanding and acceptance of these conditions by all participants in the Scheme is essential.

- j) Greater Wellington is committed to a Scheme which is fair and transparent to Clients, Contractors and Drivers. Greater Wellington takes any allegation of misuse of the Scheme seriously, and investigation action will be initiated, when considered appropriate. Where there is evidence of Scheme misuse the evidence will be referred to the Police for action. Any information provided to Greater Wellington alleging misuse of the Scheme will be treated in confidence, subject to the requirements of the Local Government Official Information and Meetings Act 1987 and any other applicable laws of New Zealand. Concerns about the misuse of the Scheme should be directed to Greater Wellington.

## Operative provisions

### 1. Purpose

The purpose of this Agreement is to record the terms under which the Contractor is to supply the Services to Clients and Greater Wellington described in this Agreement (including all schedules to this Agreement).

### 2. Definitions and interpretation

#### 2.1 Definitions

In this Agreement, unless the context requires otherwise:

**Agreed Cost of Travel** means in the context of the Services being provided, a fair and reasonable amount agreed between the Client and a Private Hire Service Provider as the full amount payable by the Client. The Agreed Cost of Travel must be established prior to the commencement of a Trip or calculation of any Subsidy;

**Agreement** means this Agreement for the Provision of Total Mobility Transport Services;

**Applicable Laws** means any New Zealand law, statute, proclamation, by-law, directive, regulation, statutory instrument, rule, order, legislation or delegated or subordinated legislation applicable to the performance of this Agreement and includes a reference to that proclamation, by-law, directive, regulation, statutory instrument, rule, order, legislation or delegated or subordinated legislation as it is amended, extended or re-enacted from time to time;

**Approved Taxi Organisation** means a contracted provider of Services that is properly licensed to provide taxi services in accordance with and as defined by the **Land Transport Rule: Operator Licensing 2007 and its amendments**;

**AT** means Auckland Transport (an Auckland Council organisation) and its successors and lawful assigns;

**Business Day** means any day registered banks are open for general banking in Wellington, other than a Saturday, a Sunday, and a public holiday;

**Certificate of Fitness** means evidence of a Vehicle inspection issued under the Land Transport Rule 35001/1: Vehicle Standards Compliance 2002;

**Client** means any person with a permanent disability or impairment who has been assessed by Greater Wellington as eligible to use the Scheme and issued with a Photo ID Card;

**Client Information** means any information about an identifiable person gathered by the Contractor or of which the Contractor or a Driver providing Services for the Contractor may become aware in the course of delivering the Services (including health information);

**Commencement Date** means the date on which this Agreement is signed by the Parties;

**Complaints Register** means the record of complaints received and maintained by the Contractor in accordance with clause 5 of Schedule 1;

**Driver** means any taxi driver (whether an individual, corporate or other entity) who is an employee, an agent, a contractor, an assignee, or any other person providing Scheme Services for the Contractor;

**Driver Terms and Conditions of Access** means the terms and conditions in a form set out in Schedule 8, as varied from time to time by Greater Wellington in accordance with this Agreement;

**Fare** means the fare shown on the Meter at the end of a Trip, calculated in accordance with the Fare Schedule;

**Fare Schedule** means the Contractor's fare schedule which sets out the rate to be charged to Clients and which is registered with the NZTA;

**Force Majeure Event** means any act of God or act of nature, confiscation or expropriation, embargo, public mains electrical supply failure, public gas supply failure, fire, flood, storm, explosion, nuclear accident, sabotage, revolution, riot, act of war whether declared or not, warlike operations, embargo, sabotage, expropriation, confiscation or requisitioning of facilities by any agency or official having or appearing to have authority, strike, lockout or other industrial action (other than a strike, lockout or industrial action limited to the Contractor's Personnel only), earthquake, landslide, volcanic eruption, epidemic or quarantine restriction which gives rise to a declaration of civil emergency, or any other event which is beyond the reasonable control of the party claiming relief;

**GST** means goods and services tax imposed under the GST Act;

**GST Act** means the Goods and Services Tax Act 1985;

**Hoist Payment** means the payment made by Greater Wellington to the Contractor when a wheelchair hoist is deployed by the Driver of a Hoist Vehicle in accordance with the Driver Terms and Conditions of Access;

**Hoist Vehicle** means a Vehicle fitted with wheelchair hoist equipment, certified to and approved by Greater Wellington;

**HSE Act** means the Health and Safety in Employment Act 1992 together with any applicable regulations made thereunder;

**Low Volume Vehicle Code** means the Code of the Low Volume Vehicle Technical Association Incorporated;

**Low Volume Vehicle Plate** means a plate, label or authority card issued in accordance with the Low Volume Vehicle Code;

**Meter** means the in-taxi meter which calculates the Fare as per the Fare Schedule;

**Motor Vehicle Register** means the register established by NZTA under the Transport (Vehicle and Driver Registration and Licensing) Act 1986 which records details of vehicles that are registered to operate on the road;

**NZQA** means the New Zealand Qualifications Authority;

**NZTA** means the New Zealand Transport Agency and its successors and lawful assigns;

**Party** means, as the context may require, Greater Wellington or the Contractor;

**Parties** means Greater Wellington and the Contractor;

**Personnel** means any member, director, officer, Driver, employee, agent, contractor, assign or any other person of a Party;

**Photo ID Card** means a photo identification card issued to a Client by Greater Wellington to prove their eligibility for the Scheme and to record Trip details;

**Private Hire Service Provider** means a contracted provider of Services that is properly licensed to provide private hire services in accordance with and as defined by the **Land Transport Rule: Operator Licensing 2007 and its amendments**.

**Services** means taxi and Client services provided under the Scheme to Clients as specified in this Agreement;

**Subsidy** means Greater Wellington's subsidy of a Client's Fare or Agreed Cost of Travel for transport determined under clause 8.1 as varied from time to time by Greater Wellington in accordance with this Agreement, which as at the Commencement Date is a maximum for any single Trip of either 50% of the total Fare or Agreed Cost of Travel payable for the Trip or \$40, whichever is the lesser amount;

**Term** means the term of this Agreement set out in clause 3.2.1;

**Terms of Use** means the document 'Terms of use for users of the Total Mobility Electronic System', as provided in Schedule 5 and subject to Greater Wellington's right to vary, at any time, upon prior notice to the Contractor any aspect of the Terms of Use as detailed in Schedule 5;

**Total Mobility Scheme** means the scheme administered by Greater Wellington providing for discounted door-to-door transport services delivered by Approved Taxi Organisations and Private Hire Service Providers for Clients;

**TMES** means the Total Mobility Electronic System used by Greater Wellington to record Client information and Client Trips operated under the Scheme;

**TMES Equipment** means any equipment and materials required to ensure the operation of the TMES and to provide the Scheme, including all equipment required and installed in a Vehicle;

**TMES Guidelines and Procedures** means the document 'TMES Guidelines and Procedures for Contractors' as provided in Schedule 4 and subject to Greater Wellington's right to vary, at any time, upon prior notice to the Contractor any aspect of the TMES Guidelines and Procedures as detailed in Schedule 4;

**Trip** means conveyance by the Contractor of a Client from one point of origin to one destination, where the destination is not the same as the origin;

**Vehicle** means any taxi or small Client service vehicle, including Hoist Vehicles, used to deliver the Scheme;

**Vehicle Fleet Register** means the register held by the Contractor that includes the information specified in clause 3 of Schedule 1 to this Agreement;

**Voucher** means paper payment vouchers issued by either Greater Wellington or any other regional council used by Clients for access to the Total Mobility Scheme; and

**Waiting Time** means a maximum waiting time of five (5) minutes spent with the Meter remaining on after the Client has entered the Vehicle and the Trip has commenced, in the course of a single Trip.

## 2.2 Interpretation

In this Agreement, unless the context otherwise requires:

- a) Headings are inserted for convenience only and do not affect the interpretation of this Agreement.
- b) If the day on which any act, matter or thing is to be done under this Agreement is not a Business Day, the act, matter or thing must be done on the next Business Day.
- c) A reference in this Agreement to dollars or \$ means New Zealand dollars and all amounts payable under this Agreement are payable in New Zealand dollars.
- d) A reference in this Agreement to any law, legislation or legislative provision includes any statutory modification, amendment or re-enactment of that law, legislation or legislative provision, and any subordinate legislation or regulations issued under that legislation or legislative provision.
- e) A reference in this Agreement to any agreement or document is to that agreement or document as amended, novated, supplemented or replaced.
- f) A reference to clauses or schedules are to clauses in and schedules to this Agreement. Each such schedule forms part of this Agreement.
- g) An expression importing a natural person includes any company, trust, partnership, joint venture, association, body corporate or governmental agency.
- h) Where a word or phrase is given a defined meaning, another part of speech or other grammatical form in respect of that word or phrase has a corresponding meaning.
- i) A word which denotes the singular also denotes the plural, a word which denotes the plural also denotes the singular, and a reference to any gender also denotes the other genders.
- j) A reference to the word 'include' or 'including' is to be construed without limitation.

### **3. Nature of the Agreement**

#### **3.1 Obligations of parties**

- 3.1.1 The Contractor must, for the Term, perform the Services and fulfil all of its obligations under this Agreement.
- 3.1.2 Greater Wellington shall make payment to the Contractor as set out in clause 8 and must fulfil all of its obligations under this Agreement.

#### **3.2 Term of Agreement**

- 3.2.1 This Agreement commences on the date it is signed by both Parties (**Commencement Date**) and shall continue for a term of 2 years thereafter or until this Agreement is terminated in accordance with its terms or by operation of any Applicable Law (whichever is the earlier).
- 3.2.2 This Agreement once signed by both Parties supersedes any other agreement for the provision of Total Mobility services, but not any agreement for the funding of wheelchair hoists for the Total Mobility Scheme that may exist on the Commencement Date.

### **4. Contractor obligations**

#### **4.1 Scope of Services provided by the Contractor**

- 4.1.1 The Contractor must provide all Services in accordance with requirements set out in this Agreement.

4.1.2 The Contractor will familiarise themselves with all obligations and requirements of this Agreement.

4.1.3 The Contractor will ensure that all Drivers confirm by signature their understanding of Driver Terms and Conditions of Access within 60 calendar days of the Commencement Date, or prior to commencement of the provision of Services by the Driver if that Driver was not a Driver as at the Commencement Date. The Contractor must not permit Drivers to provide Services until they have provided signed confirmation.

## **4.2 The Contractor's relationship to the Driver Terms and Conditions of Access to the Scheme**

4.2.1 The Contractor must ensure that Drivers comply with the Driver Terms and Conditions of Access and will use best endeavours to promote to Drivers the importance of compliance with the Driver Terms and Conditions of Access.

4.2.2 The Contractor agrees that any final decision on actions taken by Greater Wellington in response to non-compliance by any Driver with the Driver Terms and Conditions of Access lies solely with Greater Wellington.

## **4.3 Provision of the Services**

4.3.1 In the provision of Services, the Contractor must:

- a) Provide timely and efficient Services to Greater Wellington and Clients;
- b) Ensure Clients are treated with respect and dignity at all times;
- c) Ensure that any written and oral communication the Contractor's Personnel has with Greater Wellington, Clients, or the general public regarding the delivery of the Services is helpful, timely and professional;
- d) Work co-operatively with Greater Wellington;
- e) At its own expense in all respects, provide all Vehicles, TMES Equipment, tools, materials and supplies required to perform the Services unless otherwise specified in this Agreement;
- f) Ensure that sufficient technical and secretarial support staff are available to ensure the timely completion and submission of reports and other information required to be provided;
- g) Comply with all Applicable Laws (including without limitation, the Resource Management Act 1991, the Building Act 2004, and the HSE Act) and ensure that any Personnel performing Services under the direction or control of the Contractor are appropriately qualified and maintain all certificates, licences and registrations which are reasonably required for them to perform the Services;
- h) Provide reports and all other information as may be required for the carrying out of the Services and provide the same to Greater Wellington at the time(s) and frequency requested by Greater Wellington.
- i) Ensure that all Drivers are trained appropriately as set out in clause 4 of Schedule 1.
- j) Permit Greater Wellington and Greater Wellington's Personnel full access to the location where data, information and records relating to the Scheme and the Contractor's provision of Services are stored, and ensure that Greater Wellington and Greater Wellington's Personnel are given full access to such data, information and records for the purpose of auditing the

accuracy of Contractor's reports and other information supplied pursuant to paragraph (h) of this clause 4.3.1 and the Contractor's compliance with this Agreement generally.

- k) Have in place appropriate policies and procedures to ensure Drivers are properly accountable for their actions in providing the Services and complying with the Scheme. These policies and related procedures are to include, but are not limited to:
  - i. Code of conduct;
  - ii. Fraud policy or similar;
  - iii. Disciplinary policy; and
  - iv. Protected disclosure policy.
- l) Act at all times to preserve the integrity of the Scheme and whenever the Contractor has reason to suspect a Driver is not complying with the Scheme or is behaving in a way that may defraud Greater Wellington or put the integrity of the Scheme at risk it shall immediately notify Greater Wellington of such suspicion or risk(s).

#### **4.4 Licensing requirements**

4.4.1 The Contractor must be, and at all times during the Term remain, either:

- a) an Approved Taxi Organisation; or
- b) a Private Hire Service Provider

with a valid, current approval granted by the NZTA under the **Land Transport Rule: Operator Licensing 2007 and its amendments**. Any exemptions granted under the **Land Transport Rule: Operator Licensing 2007 and its amendments** must be notified to Greater Wellington prior to the Commencement Date.

4.4.2 Greater Wellington must be informed within 5 Business Days of any changes to the exemptions granted under the **Land Transport Rule: Operator Licensing 2007 and its amendments** that occur during the Term.

4.4.3 The Contractor will ensure that all Vehicles are registered and maintained as required by Applicable Law.

4.4.4 The Contractor will ensure Drivers are properly qualified and licensed as required by Applicable Law.

### **5. Variations**

#### **5.1 General provisions**

5.1.1 Subject to clause 5.2, Greater Wellington may at any time require the Contractor to comply with any reasonable variation to the Services. A variation may result in the following (but not limited to) Scheme changes:

- a) The maximum amount of Subsidy paid by Greater Wellington;
- b) The rate of Subsidy; or
- c) The conditions of use of the Scheme; or
- d) Administration or operation of the TMES.

## **5.2 Administration of variations**

- 5.2.1 Greater Wellington will notify the Contractor within 15 Business Days of the commencement of any variation to this Agreement. All notifications of variations will be in writing or, if oral, confirmed in writing. All variations will specify the full details of the changes required or to be implemented.
- 5.2.2 If the Contractor reasonably considers a variation to be a substantial change to this Agreement which is detrimental to its interests and, as a result, does not wish to implement the variation, the Contractor must advise Greater Wellington to that effect in writing within 5 Business Days of receipt of the notice of variation referred to in clause 5.2.1.
- 5.2.3 If within 15 Business Days of a notice from the Contractor of the type referred to in clause 5.2.2, Greater Wellington has not withdrawn its variation or the Parties have not agreed a variation which is acceptable to each of them in their absolute discretion, either Party may terminate this Agreement by giving the other 30 Business Days notice (which notice must be given not later than 30 Business Days after the Contractor's notice given pursuant to clause 5.2.2).

## **6. Greater Wellington's obligations**

### **6.1 Pay fees**

- 6.1.1 Greater Wellington agrees to pay the Contractor the fee for provision of the Services in accordance with clause 8 and Schedule 2 of this Agreement.

### **6.2 Access to premises**

- 6.2.1 When on the location where data, information and records relating to the Scheme and the Contractor's provision of Services are stored for the purpose set out in clause 4.3.1(j), Greater Wellington agrees to comply with the Contractor's reasonable security procedures and building regulations for access to such location or, where no such procedures or regulations are in place, Greater Wellington and Greater Wellington's Personnel will conduct such activities in a proper, diligent and competent manner.

## **7. Health and safety**

### **7.1 General Provisions**

- 7.1.1 The Contractor shall comply with all health and safety requirements applicable to it, including those under the HSE Act, and the Land Transport Act 1998 or any other Applicable Laws.
- 7.1.2 Without limiting in any way its obligations under clause 7.1.1, the Contractor will:
- a) Take all practicable steps to ensure the safety of the Contractor's Personnel while at work and to eliminate hazards in accordance with the HSE Act;
  - b) Take all practicable steps to ensure that no action or inaction of any of Contractor's Personnel while providing the Services risk or harm any other person, including any Client;
  - c) Take all practicable steps to ensure that all equipment, materials, Vehicles, are safe for their intended or reasonable foreseeable use in the provision of the Services;
  - d) Ensure that all Vehicles carry at all times a Certificate of Fitness;
  - e) Maintain a register of serious accidents and serious harm in accordance with the HSE Act;
  - f) Maintain a register of hazards in accordance with the HSE Act; and

- g) Where there occurs any accident or harm in respect of which an employer is required by the HSE Act to record particulars, the Contractor shall take all practicable steps to ensure that the occurrence is so investigated as to determine whether it was caused by or arose from a significant hazard.

- 7.1.3 Greater Wellington will ensure that any of its Personnel who come on to the Contractor's premises comply with the health and safety instructions and procedures of the site.
- 7.1.4 The Contractor must provide the Services in accordance with all requirements of the Health and Disability Commissioner (Code of Health and Disability Services Consumer Rights) Regulations 1996.
- 7.1.5 In particular, the Contractor must ensure that there is respect for the personal privacy and dignity of Clients at all times during delivery of the Services.
- 7.1.6 The Contractor must take account of the particular needs of Clients so that there are no barriers to access or communication.

## **7.2 Hoist Vehicle operations**

- 7.2.1 The Contractor will ensure that all Hoist Vehicles hold and carry a Low Volume Vehicle Plate.
- 7.2.2 The Contractor will ensure the wheelchair hoist equipment and the Hoist Vehicles are maintained at Certificate of Fitness standards, and all Hoist Vehicles carry a current Certificate of Fitness at all times.
- 7.2.3 The Contractor will ensure that all wheelchair dependant Clients who are transported in a Hoist Vehicle are restrained with a harness belt, lap belt or lap-sash belt as defined in the Australian Standard AS 2942 1994. These restraints must be connected to floor-mounted anchor fittings at the rear of the wheelchair to stop any forward motion of the Client.
- 7.2.4 All practicable attempts to secure all Clients travelling in a wheelchair in a Hoist Vehicle must be made. Drivers will not be permitted to carry any Client who refuses to wear the appropriate seatbelt unless the Client provides to the Driver an appropriate NZTA exemption document or medical certificate which exempts the Client from wearing a seatbelt.

## **8. Payments**

### **8.1 Payment for Services**

- 8.1.1 The fee for the Services will be:
- h) The Subsidy set out at clause 1.1 of Schedule 2; and
  - i) The Hoist Payment set out at clause 1.2 of Schedule 2
- 8.1.2 Any variation to the Services requiring an increase or decrease in the fee must be made in accordance with clause 5 of this Agreement.
- 8.1.3 It is the Contractor's responsibility to recover from the Client the difference between the Fare or Agreed Cost of Travel and the Subsidy.
- 8.1.4 Greater Wellington bears no responsibility for any non-payment of a Fare or Agreed Cost of Travel by a Client in any instance and the Contractor irrevocably waives all and any rights it may have to recover any such non-payment by a Client from Greater Wellington.

## **8.2 Hoist Payments**

8.2.1 The Contractor will only be entitled to a Hoist Payment provided the following conditions are met:

- j) The Hoist Payment is claimed in accordance with the Driver Terms and Conditions of Access;
- k) The Vehicle employed to transport the Client is registered with Greater Wellington as a Hoist Vehicle; and
- l) The TMES Equipment installed in the Hoist Vehicle is compliant with the specifications in Schedule 6 to this Agreement.

8.2.2 For the avoidance of doubt; use of a Hoist Vehicle in the operation of a Trip where the wheelchair hoist is not employed does not constitute eligibility for a Hoist Payment.

## **8.3 Invoices and payments**

8.3.1 The Contractor will comply with the invoicing rules and processes set out in this Agreement, including those set out in clauses 2 and 3 of Schedule 2.

8.3.2 An invoice for payment of any Subsidy or Hoist Payment properly due and payable will be submitted by the Contractor on no less than a monthly basis to Greater Wellington no later than 7 calendar days following the end of each month.

8.3.3 The Contractor must immediately update the TMES in accordance with the TMES Guidelines and Procedures to ensure all transactions have been properly recorded.

8.3.4 Each of the Contractor's invoices must match the transaction records within the TMES. Greater Wellington will make no payment in respect of transactions which are not recorded in the TMES.

8.3.5 Each of the Contractor's invoices will be based on the value of transactions in accordance with the TMES only. Administration or handling charges are not permitted to be added.

8.3.6 If the Contractor, with the prior agreement of Greater Wellington, sub-contracts either or both its invoicing and administration functions to a factoring agency or finance company, the Contractor must do so in compliance with clause 18.2 of this Agreement at all times.

8.3.7 If the Contractor, with the prior agreement of Greater Wellington, assigns either or both its invoicing and administration functions to a third party the Contractor must do so in compliance with clause 18.3 of this Agreement at all times.

8.3.8 The Contractor will be responsible for checking the validity of all data and transactions before submitting invoices to Greater Wellington.

8.3.9 Greater Wellington has the right to deduct from the next Contractor's invoice any transaction that has been in dispute for more than 15 Business Days.

8.3.10 The Contractor must ensure that each of its invoices complies with the requirements of section 24(3) of the GST Act.

8.3.11 The Contractor must maintain full records of:

- a) The Services provided;
- b) The Subsidy invoiced to Greater Wellington;
- c) The Hoist Payments invoiced to Greater Wellington;
- d) Any other approved expenses invoiced to Greater Wellington; and

- e) Any other information required by Greater Wellington including but not limited to the matters referred to in clause 10.1.2.

## 8.4 Payment

- 8.4.1 Subject to clause 8.4.2, Greater Wellington shall pay each of the Contractor's invoices properly due and payable on the 20<sup>th</sup> day of the month following receipt of the invoice in accordance with clauses 2 and 3 of Schedule 2.
- 8.4.2 Greater Wellington may withhold payment of any invoice (or part of an invoice) issued by the Contractor under this Agreement (or if the invoice in question has already been paid, may set off previous payment of any such invoice (or part of an invoice) against future invoices) if and only to the extent to which:
- The Contractor has, in providing any Services, failed to comply with this Agreement including the quality of Services delivered or the Driver has, in providing any Services, failed to comply with the applicable Driver Terms and Conditions of Access; and
  - Such failure is not directly attributable to any act or omission by Greater Wellington under this Agreement; and
  - Greater Wellington has notified the Contractor of the failure in writing within 10 Business Days of becoming aware of such failure; and
  - If the failure is capable of remedy, the Contractor has not remedied the failure within 10 Business Days of Greater Wellington's notice referred to in paragraph (c) of this clause 8.4.2.
- 8.4.3 Any amounts withheld or set off by Greater Wellington under clause 8.4.2 will be paid or reversed once the failure has been remedied (if capable of remedy).
- 8.4.4 In addition to Greater Wellington's obligation to pay any Subsidy and the Hoist Payment properly due and payable, Greater Wellington agrees to pay the Contractor GST for the Services supplied under this Agreement which are deemed to occur under the GST Act, except where an amount payable is inclusive of GST.
- 8.4.5 GST will be payable by Greater Wellington on the date payment for the relevant supply is due under clause 8.4.1, provided the Contractor has provided a valid tax invoice which is in accordance with clause 2 of Schedule 2.

## 9. Indemnity and Insurance

### 9.1 Indemnity

The Contractor will indemnify and hold harmless Greater Wellington, its Councillors, employees, agents, contractors and advisors (each, an "**Indemnified Person**") from and against any liability, damage or damages, loss, awards (including, but not limited to, any reparation order) cost or expense (including, without limitation, damage to property, plant or equipment) suffered or incurred by Greater Wellington or an Indemnified Person, at any time, as a direct or indirect result of any action or inaction by the Contractor and the Contractor's Personnel in the provision of the Services.

## **9.2 Set off**

Greater Wellington is authorised by the Contractor to deduct and set off any moneys payable by the Contractor to Greater Wellington from and against any moneys payable by Greater Wellington to the Contractor under this Agreement.

## **9.3 Public Risk Insurance**

9.3.1 Unless otherwise agreed in writing between Greater Wellington and the Contractor, the Contractor will at all times during the Term, maintain in effect, and require each of the Contractor's Personnel who are not employees of the Contractor, to maintain in effect, with in a reputable insurer with a place of business in New Zealand, an insurance policy of the type known as "Public Risk" including exemplary and punitive damages extension to the value of \$1,000,000 in respect of each and every event.

9.3.2 Each "Public Risk" insurance policy referred to in clause 9.3.1 will be constructed so as to indemnify the Contractor, the relevant Personnel, together with Greater Wellington and NZTA, both severally and jointly, from any "Public Risk" liability which may accrue to them as a result or consequence of the Contractor's undertakings in this Agreement and the performance of the Services by the Contractor or the Personnel on behalf of the Contractor.

9.3.3 Evidence of the holding of the appropriate policy, to come into force on or prior to Commencement Date, will be provided by the Contractor at the Commencement Date. On request by Greater Wellington, proof of current policies should be made available to Greater Wellington throughout the Term as requested.

9.3.4 The Contractor will ensure Contractor Personnel carry "Public Risk" insurance under this Agreement during the Term through the conduct of regular audits of Contractor Personnel's insurance policy, for currency and appropriate cover. On request by Greater Wellington, proof of audit of current policies should be made available to Greater Wellington throughout the Term as requested.

9.3.5 If the Contractor fails to comply with this clause 9 in any respect Greater Wellington shall be entitled to terminate this Agreement upon giving written notice to the Contractor with effect from the date specified in such notice.

## **9.4 Other Insurance**

9.4.1 Unless otherwise agreed in writing between Greater Wellington and the Contractor, the Contractor will maintain comprehensive insurance policies with respect to all Vehicles operated under this Agreement during the Term including exemplary and punitive damages extension to the value of \$1,000,000 in respect of each and every event.

9.4.2 Where a Vehicle is owned by Contractor Personnel, then the Contractor must ensure that the Contractor Personnel maintains comprehensive insurance policies with respect to the Vehicle operated under this Agreement during the Term; including exemplary and punitive damages extension to the value of \$1,000,000 in respect of each and every event.

9.4.3 The Contractor will ensure Contractor Personnel carry comprehensive insurance policies with respect to the Vehicle operated under this Agreement during the Term through the conduct of regular audits of Contractor Personnel's insurance policies, for currency and appropriate cover. On request by Greater Wellington, proof of audit of current policies should be made available to Greater Wellington throughout the Term as requested.

9.4.4 Where applicable, evidence of the holding of the appropriate Vehicle policy by the Contractor, to come into force on or prior to Commencement Date, will be provided by the Contractor at the Commencement Date. On request by Greater Wellington, proof of current policies should be made available to Greater Wellington throughout the Term as and when requested.

## 10. Operational and Administrative Audits

### 10.1 Scope

- 10.1.1 Greater Wellington is entitled to audit from time to time the Contractor's provision of the Services and compliance with its obligations under this Agreement (including Driver compliance) by giving no less than 5 Business Days notice before commencing the audit (except in the case of a health & safety audit in relation to a serious harm incident which has occurred, where less than 5 Business Days notice may be given).
- 10.1.2 Greater Wellington will conduct audits that include, but are not limited to:
- a) Transaction process requirements including appropriate audit trails; and
  - b) Entering of transaction information and transfer of data to the TMES; and
  - c) Compliance with health & safety standards; and
  - d) Driver training records; and
  - e) Driver acceptance by signature, of the "Driver Terms and Conditions of Access to the Total Mobility Scheme"; and
  - f) Driver training content; and
  - g) Vehicle fleet details, including vehicle age; and
  - h) Client complaints register; and
  - i) The delivery of the Services.
- 10.1.3 During the audit, the Contractor will provide to Greater Wellington's Personnel such information, assistance and co-operation as is required by Greater Wellington (acting reasonably) for the audit.
- 10.1.4 The Contractor will ensure that all transactions are fully auditable and all queries relating to the audit are responded to within 3 Business Days.
- 10.1.5 Greater Wellington will conduct reviews of submitted data entered into the TMES. Any identified anomalies within the data will become the responsibility of the Contractor to promptly investigate and report its findings to Greater Wellington. On receipt of the identified anomalies the Contractor will within 3 Business Days investigate and report its findings to Greater Wellington (and at the option of Greater Wellington) be held financially liable in cases of any unexplained anomaly (determined in sole discretion by Greater Wellington) or delay in investigation, including but not limited to the duplication of transaction data or any other instance leading to a breach of this Agreement.
- 10.1.6 Greater Wellington reserves the right to conduct interviews with any Personnel, including Drivers, and Clients to assist in the conducting of audits of the Contractor's obligations under this Agreement.

## **11. Information**

### **11.1 Fares and Fare schedules of Approved Taxi Operators**

- 11.1.1 The Contractor must provide Greater Wellington with a copy of its current Fare Schedule on the Commencement Date.
- 11.1.2 The Contractor must give Greater Wellington at least 21 days notice in writing before making any change to the Fare Schedule.
- 11.1.3 The Contractor must ensure the Fare is calculated and displayed on the Meter in accordance with the Fare Schedule.
- 11.1.4 The Contractor will ensure that the Fare is not more than that stated in the Fare Schedule.

### **11.2 Fares for Private Hire Service Providers**

- 11.2.1 The amount payable by the Client when travelling with a Contractor providing a Private Hire Service will be the Agreed Cost of Travel.
- 11.2.2 The Contractor must provide Greater Wellington with its current Agreed Cost of Travel calculation methodology and any qualifying criteria.
- 11.2.3 The Contractor must give Greater Wellington at least 21 days notice in writing before making any change to calculation methodology of the Agreed Cost of Travel and any qualifying criteria.
- 11.2.4 The Contractor will ensure that the amount charged for a Private Hire Service Trip is not more than the Agreed Cost of Travel calculated in accordance with the methodology and criteria under clauses 11.2.2 and 11.2.3.

### **11.3 New Zealand Transport Agency Information**

- 11.3.1 The Contractor agrees to Greater Wellington accessing and sharing information with NZTA in relation the provision of the Scheme and the Services, which includes but is not limited to the following information:
  - a) The Motor Vehicle Register to confirm the current ownership and ownership history of the Vehicles to be used for the Services; and
  - b) NZTA systems in use to retrieve and provide details of Certificate of Fitness inspections, including details of faults and re-inspections carried out during the Term; and
  - c) Any other NZTA information systems as may be necessary to retrieve and provide details of events including roadside inspections of Vehicles and traffic offences related to the operation of Vehicles; and
  - d) Seeking advice from NZTA personnel.
- 11.3.2 The Contractor will ensure that, if requested by Greater Wellington, the owner of any Vehicle providing the Services gives approval, in a manner prescribed by NZTA, for Greater Wellington to access and share information as may be required in accordance with clause 11.3.1.

### **11.4 Sharing of information to other parties**

The Contractor agrees to Greater Wellington accessing and sharing any of the information referred to in clause 11.1, 11.2 and 11.3 with the Ministry of Education and territorial local authorities within Greater Wellington's region in relation to the provision of the Scheme and Services.

## 12. Confidentiality

### 12.1 Confidentiality of Client Information

- 12.1.1 Greater Wellington and the Contractor acknowledge that during and after the Term, Greater Wellington and the Contractor may acquire or hold confidential Client Information. If Greater Wellington or the Contractor acquire any Client Information, Greater Wellington and the Contractor will only be permitted to use the Client Information to the extent necessary to perform their respective obligations under this Agreement and will not disclose the Client Information except as required or permitted by the Health Act 1956, the Privacy Act 1993 and the Health Information Privacy Code 1994.
- 12.1.2 The Contractor must establish and maintain processes to ensure the confidentiality of Client Information in compliance with the Health Act 1956, the Privacy Act 1993 and the Health Information Privacy Code 1994, as applicable. The Contractor will ensure that Client Information is kept in accordance with the requirement of any Applicable Law. Any disclosure of information by the Contractor identifying any natural person must comply with the Health Act 1956, the Privacy Act 1993 and the Health Information Privacy Code 1994, as applicable. The Contractor warrants (as a continuing warranty for the Term) that any information including Client Information provided to Greater Wellington whether under this Agreement or not is provided lawfully.

### 12.2 Local Government Official Information and Meetings Act 1987

- 12.2.1 The Contractor acknowledges that for so long as Greater Wellington is a party to this Agreement, that Greater Wellington is subject to the Local Government Official Information and Meetings Act 1987 (LGOIMA) and Greater Wellington may be required to disclose information under the LGOIMA or under any other Applicable Law or by order of any court.
- 12.2.2 Upon receipt of a request under the LGOIMA by Greater Wellington in relation to confidential information relating to this Agreement, Greater Wellington will notify the Contractor of the request and will consider any comments from the Contractor as to how it will respond. It will be the final decision of Greater Wellington to determine the manner in which the request will be dealt with. Greater Wellington will notify the Contractor of its decision on the request in such time as to give the Contractor a reasonable opportunity to seek legal remedies before the information is released.
- 12.2.3 Greater Wellington and the Contractor acknowledge that the LGOIMA provides for responses to be made for requests for information within stipulated time frames. Greater Wellington and the Contractor must use their reasonable endeavours to comply with those time frames and communicate and respond, each with the other, having regard to those time constraints.
- 12.2.4 The LGOIMA in some instances provides for grounds to withhold disclosure of information. Greater Wellington makes no representations and gives no warranties that these grounds will be applicable or can be relied upon at any time.
- 12.2.5 In the event of an applicant appealing the decision of Greater Wellington of a request under the LGOIMA to the office of the Ombudsman not to disclose information, where the information concerned is confidential information of the Contractor, Greater Wellington will notify the Contractor of that fact. Greater Wellington is entitled to provide the confidential information the subject of the official information request to the Ombudsman to enable the appeal to be considered but for no other reason.

## **13. The Total Mobility Electronic System**

### **13.1 Operation of the TMES**

13.1.1 The Contractor must comply with the TMES Guidelines and Procedures and the Terms of Use, both subject to Greater Wellington's right to variation of any aspect, at any time, upon prior notice to the Contractor.

13.1.2 To ensure the TMES operates efficiently and effectively, the Contractor must:

- a) provide all Services in the manner specified in Schedule 1; and
- b) ensure that all Drivers confirm by signature their understanding of Driver Terms and Conditions of Access, in accordance with clause 4.1.3 of this Agreement.

### **13.2 TMES Equipment**

13.2.1 All TMES Equipment will be compliant with the type specified in Schedule 6, and used in accordance with Schedule 1 of this Agreement.

13.2.2 The Contractor will be required to upgrade TMES Equipment at its own cost as Greater Wellington requires, particularly in respect to linking between individual components of the TMES Equipment and any Meter or distance measuring equipment.

## **14. Force Majeure**

### **14.1 No liability**

14.1.1 A Party is not liable for failure to perform or delay in performing an obligation if:

- a) The failure or delay arose from a Force Majeure Event; and
- b) The Party took all reasonable precautions against the cause of the Force Majeure Event and used its reasonable endeavours to mitigate the consequences of the Force Majeure Event; and
- c) The Party is unable to provide alternative Personnel, facilities or materials or other equipment (**Alternative Arrangements**) to mitigate the consequences of the Force Majeure; and
- d) Written notice is given to the other Party as soon as practicable after it becomes aware of the Force Majeure Event setting out full particulars and detailed information about the precautions and Alternative Arrangements referred to in paragraphs (b) and (c) of this clause 14.1.1 (to the extent not excluded by any confidentiality or privacy obligations) and of the likely effect on it and its ability to perform its obligations under this Agreement.

14.1.2 A Party affected by a Force Majeure Event will promptly use all reasonable endeavours to mitigate the effect of the Force Majeure Event on its ability to perform its obligations under this Agreement despite the Force Majeure Event.

### **14.2 Notice**

14.2.1 From the date notice is served in accordance with clause 14.1.1(d), neither Party is required to perform its obligations under this Agreement that are dependant on the delayed or failed obligations that are due to the Force Majeure Event until the Party that gave notice is able to resume full performance of its obligations.

- 14.2.2 Upon cessation of such effect of the Force Majeure Event so that the Party affected is once more able to perform its obligations under this Agreement, it will promptly give notice in writing to that effect to the other Party.

### 14.3 Termination in the event of a Force Majeure Event

If, after a continuous period of 6 months after a Force Majeure Event has occurred, the party affected by the Force Majeure Event is in the reasonable opinion of the other party, incapable of performing all its obligations under this Agreement, then that other party may give written notice to the other terminating this Agreement with effect from the date specified in such notice.

## 15. Dispute Resolution

### 15.1 Dispute

- 15.1.1 If a dispute arises between the Parties under or in relation to or concerning this Agreement, or the Parties' rights and obligations under this Agreement then, unless other provisions of this Agreement govern the manner in which that dispute is to be resolved, the Parties must enter into negotiations in good faith to try to resolve the dispute. Any Party may initiate the negotiations by giving written notice to the other Party. The other Party must then promptly name its representative in the negotiations. Each representative must have authority to settle the dispute. Within 3 Business Days of the Parties having advised each other of their representatives, the representatives must enter into negotiations to try and resolve the dispute.
- 15.1.2 If the Parties have been unable to resolve the dispute in accordance with clause 15.1.1, then either Party may refer the dispute to mediation in accordance with clause 15.2.

### 15.2 Mediation

- 15.2.1 A referral to mediation by a Party must be commenced by that Party serving written notice (a **Mediation Notice**) on the other Party requiring the dispute to be referred to a single mediator to be appointed by the Parties. If the Parties are unable to agree on the mediator within 5 Business Days after the date of service of a Mediation Notice, either Party may request the President for the time being of LEADR NZ Inc., or his or her nominee to appoint the mediator.
- 15.2.2 The guidelines that govern the mediation shall be set by the Parties.
- 15.2.3 If the Parties are unable to agree on the guidelines governing the mediation within 5 Business Days after the appointment of the mediator, either Party may request the mediator to set the guidelines (whether or not in conjunction with the Parties).
- 15.2.4 The Parties acknowledge and agree that the purpose of exchange of information or documents or the making of any offer of settlement during any mediation is to attempt to settle the dispute between the Parties. Neither Party may use any such information, documents or offer other than in an attempt to settle the dispute in the context of negotiation and mediation.
- 15.2.5 Subject to any right a Party may have to apply to a court for any interim or preliminary relief in respect of the dispute, completion or termination of the mediation is a condition precedent to the referral of the dispute to arbitration pursuant to clause 15.3.
- 15.2.6 Unless the Parties agree otherwise, the mediator's fee and any other costs of the mediation itself (such as venue hire) shall be shared equally between the Parties, but the Parties will each pay their own costs of preparing for and participating in the mediation.

### **15.3 Arbitration**

- 15.3.1 If the Parties are unable to resolve the dispute by mediation pursuant to clause 15.2 within 10 Business Days of the establishment of the mediation guidelines, the dispute may be referred to and finally resolved by arbitration by a sole arbitrator under the Arbitration Act 1996. The arbitral proceedings shall be commenced if a Party serves written notice (an **Arbitration Notice**) on the other Party requiring the dispute to be referred to arbitration.
- 15.3.2 The arbitrator shall be appointed by the Parties, or failing agreement within 5 Business Days after the date of service of the Arbitration Notice, the arbitrator shall be appointed at the request of either Party by the President for the time being of the New Zealand Law Society or his or her nominee.
- 15.3.3 The arbitration shall be conducted as soon as possible at Wellington in New Zealand. Clauses 3 and 6 of the Second Schedule of the Arbitration Act 1996 shall apply to any arbitral proceedings under this Agreement. All other clauses in the second schedule shall not apply.
- 15.3.4 The Parties will be bound by any decision or award of the arbitrator made in accordance with the Arbitration Act 1996, subject to the rights of appeal provided by that Act.

### **15.4 Performance of obligations**

Despite the existence of a dispute, each Party must continue to perform its obligations under this Agreement.

### **15.5 Interlocutory relief and right to terminate**

This clause 15 does not restrict or limit the right of any Party to obtain interim interlocutory relief through the New Zealand courts, or to immediately terminate this Agreement where this Agreement provides such a right.

## **16. Termination**

### **16.1 Events of Default by Contractor**

16.1.1 In addition and without prejudice to its other available rights and remedies, Greater Wellington shall be entitled to terminate this Agreement if the Contractor:

- a) Fails to comply with any notice given by Greater Wellington pursuant to this Agreement;
- b) Fails to comply with or commits an offence under any Applicable Law;
- c) Fails to perform or breaches any of its obligations under this Agreement; or
- d) Breaches any warranty or representation provided under this Agreement;

16.1.2 And such failure or breach is not the direct result of any act or omission of Greater Wellington, and the Contractor fails to remedy the failure or breach (if capable of remedy) within 10 Business Days of a written notice by Greater Wellington specifying the breach and requiring its remedy. If the failure or breach is not capable of remedy the termination will be effective immediately upon notice by Greater Wellington to the Contractor.

### **16.2 Further events of default**

16.2.1 Greater Wellington may, in addition and without prejudice to any other right or remedy it might have, by notice in writing to the Contractor, immediately terminate this Agreement:

- a) If:

- (i) An administrator is appointed to the Contractor or action is taken to make that appointment;
  - (ii) A resolution is passed that the Contractor be wound up;
  - (iii) An application is made to a court for an order or an order is made that the Contractor be wound up (whether on grounds of insolvency or otherwise);
  - (iv) The Contractor ceases or threatens to cease to carry on its main business;
  - (v) A receiver or a receiver and manager of the Contractor is appointed whether by a court or otherwise;
  - (vi) An order is made by a court appointing a liquidator or provisional liquidator in respect of the Contractor;
  - (vii) The Contractor enters into a compromise or arrangement with its creditors or a class of them; or
  - (viii) The Contractor is, or is deemed by any Applicable Law to be, or states that it is, unable to pay its debts as and they fall due.
- b) If Greater Wellington elects to terminate under any of the following clauses:
- (i) Clause 5.2.3 (failure to agree a Variation);
  - (ii) Clause 9 (Insurance); or
  - (iii) Clause 14 (Force Majeure Event).
- c) If Greater Wellington determines in its absolute discretion that there is a lack of funding for Services available to Greater Wellington; or
- d) If Greater Wellington's funding for the Scheme is withdrawn.

### **16.3 Termination of the Agreement by the Contractor**

- 16.3.1 The Contractor may give 30 Business Days notice to Greater Wellington of its wish to terminate this Agreement. If the Contractor gives any such notice, this Agreement shall terminate on the expiry of the Contractor's notice or on such earlier date as may be agreed between the Parties.

### **16.4 Council's further options**

- 16.4.1 If Greater Wellington terminates this Agreement for any reason, the Contractor shall sign all necessary documentation and do all such acts matters and things as may be necessary to give effect to such termination.

### **16.5 Effect of termination**

- 16.5.1 Termination of this Agreement does not affect any accrued right or liability of the Parties nor will it affect the coming into force or the continuation in force of any provision of this Agreement that is expressly or by implication intended to come into or continue in force on or after termination.
- 16.5.2 If Greater Wellington terminates this Agreement for any reason, then Greater Wellington will reimburse the Contractor for any claims properly due and payable up to the date of termination but without prejudice to Greater Wellington's available rights and remedies (including, but not limited to, its rights of deduction and set-off)

## 17. Notices

### 17.1 Each notice or other communication under this Agreement must be:

- a) In writing, in English and signed by an authorised representative of the Party giving the notice;
- b) Given to the recipient Party:
  - (i) By hand delivery; or
  - (ii) By prepaid mail sent to that party; or
  - (iii) By email
- c) The initial facsimile number, address and relevant person or office holder of each party is set out below, or if no longer valid:
  - (i) As notified by the addressee to the Party initiating the notice; or
  - (ii) To an address attributable to a person reasonably assumed to be directly replacing any addressee in the context of position or status.

<b>Greater Wellington:</b>	<b>Greater Wellington Regional Council</b>
Attention:	Total Mobility Co-ordinator
Address:	P O Box 11646 142 Wakefield Street Wellington New Zealand
Email:	mailto:totalmobility@gw.govt.nz
<b>Contractor:</b>	<name>
Attention:	<name>
Address:	<address>
Facsimile:	<fax>
Email:	<email address>

- d) A notice or communication given by a Party to the other Party under this Agreement will be deemed to be received by the addressee:
  - (i) in the case of an email, on the Business Day on which it is despatched or, if despatched after 5 p.m. (in the place of receipt) on a Business Day or, if despatched on a non-Business Day, on the next Business Day after the date of despatch;
  - (ii) in the case of personal delivery, when delivered; and
  - (iii) In the case of a letter, 2 Business Days after posting by mail.

## **18. Miscellaneous**

### **18.1 Future Agreements**

Greater Wellington reserves the right not to enter into any future arrangement or agreement with the Contractor the same as or similar to this Agreement.

### **18.2 Sub-Contracting**

18.2.1 The Contractor will not be permitted to sub-contract the whole or any part of the Services or any of its obligations under this Agreement to any other person without the prior written consent of Greater Wellington, such consent not to be unreasonably withheld and to be upon and subject to such reasonable conditions as Greater Wellington reasonably approves.

18.2.2 The Contractor must establish to the satisfaction of Greater Wellington the suitability of a sub-contractor for the provision of the Services and, notwithstanding any other provision of this Agreement, the Contractor remains entirely liable whether under statute, by-law, regulation or in contract or tort (including negligence) for the provision of the Scheme and satisfying the obligations and provisions of this Agreement, including supplying invoices, payment, and information as required, notwithstanding such sub-contracting.

### **18.3 Assignment**

18.3.1 This Agreement will be binding on and continue for the benefit of the Parties and their respective successors.

18.3.2 The Contractor will not be permitted to assign the Services or any of its rights or obligations under this Agreement, except with the prior written consent of Greater Wellington in its absolute direction. Any such consent given by Greater Wellington under this clause may be given subject to such conditions as Greater Wellington may require.

18.3.3 The Contractor must ensure the suitability of any assignee of the Services or any of its rights or obligations under this Agreement and it will remain the responsibility of the Contractor to ensure the Services are performed in accordance with the Agreement, and that the provisions of the Agreement are observed in every respect, including invoices and payment, and information to be supplied notwithstanding such assignment.

18.3.4 Any change in the shareholding or the effective management control of the Contractor or any alteration in its constitution or rules having the effect of altering the effective management control of the Contractor will be deemed to be a proposed assignment and will require the consent of Greater Wellington in accordance with this clause 18.3.

### **18.4 Independent Contractors**

18.4.1 The relationship between Greater Wellington (on the one hand) and the Contractor and its Personnel (on the other hand) is and will be for all purposes be that of independent contractors and neither this Agreement nor anything contained expressly within it or implied by it will constitute any other relationship.

18.4.2 For the avoidance of doubt, Greater Wellington and the Contractor acknowledge and agree that this Agreement will not operate as, or constitute, an offer or contract of employment between Greater Wellington and the Contractor or its Personnel either during termination after expiry the Term, for whatever reason.

18.4.3 The Contractor will not act, purport or hold itself out as the agent of Greater Wellington for any purpose whatsoever, or incur any obligation in the name of Greater Wellington whatsoever, or do any other act or thing which could or would lead to any claim being made against Greater Wellington.

**18.5 Entire Agreement**

This Agreement constitutes the entire agreement between the Parties for the Services and any previous agreements, understandings and negotiations on the Services are superseded and replaced by this Agreement and shall cease to be of any further effect as and from the Commencement date. Unless otherwise specifically agreed in writing between the Parties, the terms and conditions of this Agreement prevail over any terms or conditions set out in any other agreement between the parties or document which the Contractor directly or indirectly provides to Greater Wellington and such other terms and conditions are deemed to be rejected by Greater Wellington. For the avoidance of doubt, the conduct of Greater Wellington will not constitute acceptance by Council of any existing or subsequent terms set out in any such other document, which the Contractor directly or indirectly provides to Greater Wellington.

**18.6 Variations**

Without prejudice to clause 5 (Variations), no variation of this Agreement shall be effective unless it is in writing and signed by or on behalf of each Party.

**18.7 Waiver**

No waiver of any breach of, or failure to enforce, any provision of this Agreement, at any time by a Party in any way affects, limits or waives the right of such party to enforce and compel strict compliance with the provisions of this Agreement (including the ability to terminate following an event of default).

**18.8 Governing Law**

This agreement is governed by the laws of New Zealand. Each party irrevocably and unconditionally submits to the exclusive jurisdiction of the courts of New Zealand.

RELEASED UNDER THE OFFICIAL INFORMATION ACT 1982

RELEASED UNDER THE OFFICIAL INFORMATION ACT 1982

## Executed as an agreement

Date:

Signed for and on behalf of )

**Wellington Regional Council** by: ) \_\_\_\_\_

) Authorised Officer

In the presence of:

\_\_\_\_\_  
Authorised Officer Signature

Signature of Witness

Name of Witness

Occupation

Address

Signed for and on behalf of )

<name> by: ) \_\_\_\_\_

) Director

in the presence of:

\_\_\_\_\_  
Director/Authorised Person

Signature of Witness

Name of Witness

Occupation

Address

RELEASED UNDER THE OFFICIAL INFORMATION ACT 1982

## Schedule 1: Services provided by the Contractor

### 1. Background

- 1.1 The Contractor will be responsible for providing Services in accordance with all aspects of this Agreement, including but not limited to all obligations of the Contractor as specified in clause 4 of this Agreement.
- 1.2 The Contractor will be responsible for ensuring all Drivers confirm by signature their acceptance of the Driver Terms and Conditions of Access.
- 1.3 The Contractor will be responsible for the conveyance of Clients and the handling of transactions to ensure the smooth running of the Scheme's administration. The overview of the transaction process is set out in clause 7 of this Schedule.
- 1.4 The Contractor will comply with all requirements of the TMES Guidelines and Procedures.

### 2. Hours of service

- 2.1 The Contractor must ensure Vehicles, Hoist Vehicles, and Drivers are available and are able to provide Trips to the Clients over the equivalent hours that public bus, train and ferry services are available within the Contractor's geographic operating area.
- 2.2 Notwithstanding clause 2.1 of this Schedule, Clients which require the use of a Hoist Vehicle are expected to pre-book a Hoist Vehicle for any Trips that will be made between 7pm and 7am Monday to Saturday and all day Sunday and public holidays.

### 3. Vehicle Requirements

- 3.1 The Contractor will ensure that all non-Hoist Vehicles will be no older than 10 years from date of first registration when providing Trips for the Scheme.
- 3.2 The Contractor will ensure that all Hoist Vehicles will be no older than 15 years from date of first registration when providing Trips for the Scheme.
- 3.3 The Contractor will ensure that all Vehicles hold and carry a current Certificate of Fitness.
- 3.4 The Contractor's Vehicles are recorded on the Motor Vehicle Register, and the Contractor will also maintain a Vehicle Fleet Register which contains the following information as a minimum:
  - a) Driver(s) name(s)
  - b) Vehicle make / model
  - c) Registration number / year of 1<sup>st</sup> registration
- 3.5 For each Hoist Vehicle the following additional information is required:
  - a) Cab number
  - b) Driver(s) name(s)
  - c) Vehicle make / model
  - d) Registration number / year of 1<sup>st</sup> registration
  - e) Low Volume Vehicle Plate number
  - f) Date of installation of hoist equipment

- g) Hoist maintenance records

#### **4. Driver training requirements**

- 4.1 All of the Contractor's Drivers must be qualified in accordance with the Driver Training Standards set out in Schedule 3 of this Agreement at the Commencement Date.
- 4.2 The Contractor must ensure all new Drivers must be qualified in accordance with the approved Driver Training Standards set out in Schedule 3 of this Agreement within three months of the Driver joining the Contractor; otherwise they will be prohibited to provide the Trips to Clients until such time as they are fully trained and qualified.
- 4.3 The Contractor will undertake to allocate a trained Driver in all instances where the Client states that they are a Client of the Scheme.
- 4.4 The Contractor must ensure that all Drivers operating a Vehicle are trained and are competent in the use of the TMES Equipment.
- 4.5 The Contractor must ensure that Driver training records are held and are up to date at all times and Greater Wellington has access to the records at its request.

#### **5. Complaint handling and advice to Greater Wellington**

- 5.1 The Contractor will acknowledge all complaints and feedback received from Greater Wellington, Clients and the general public (the **Complainant**) regarding the provision of the Services by the Contractor. The Contractor will record details of these complaints as specified in clause 5.2 below.
- 5.2 For each complaint the following information must be recorded in the Complaint Register:
  - a) Unique complaint number; and
  - b) Driver details, if the complaint is Driver related; and
  - c) Date the complaint was received; and
  - d) Complaint details i.e. reason for complaint; and
  - e) Date the complaint was responded to and the resolution action taken; and
  - f) Complainant's contact details
- 5.3 The Contractor must ensure the Complaints Register is up to date at all times and Greater Wellington has access to the Complaints Register at its request.
- 5.4 The Contractor must respond to all complaints within 5 Business Days of the receipt of the complaint.
- 5.5 If more than 3 complaints are received in one calendar year for an individual Driver then the Contractor must retrain the Driver to ensure the Driver meets the approved Driver Training Standards as set out in Schedule 3.
- 5.6 In the event a complainant wishes to remain anonymous then the Contractor will ensure that the rigour applied to investigation of the complaint is no less than if the complainant was not anonymous.

#### **6. Greater Wellington investigation of complaints**

- 6.1 Greater Wellington is committed to a Scheme which is fair and transparent to Contractors, Clients and Drivers. Greater Wellington takes any allegation of misuse of the Scheme

seriously, and investigation action will be initiated, when considered appropriate. Where there is evidence of Scheme misuse the evidence will be referred to the Police for action. Any information provided to Greater Wellington alleging misuse of the Scheme will be treated in confidence, subject to the requirements of the Local Government Official Information and Meetings Act 1987 and any other applicable laws of New Zealand. Concerns about the misuse of the Scheme should be directed to Greater Wellington.

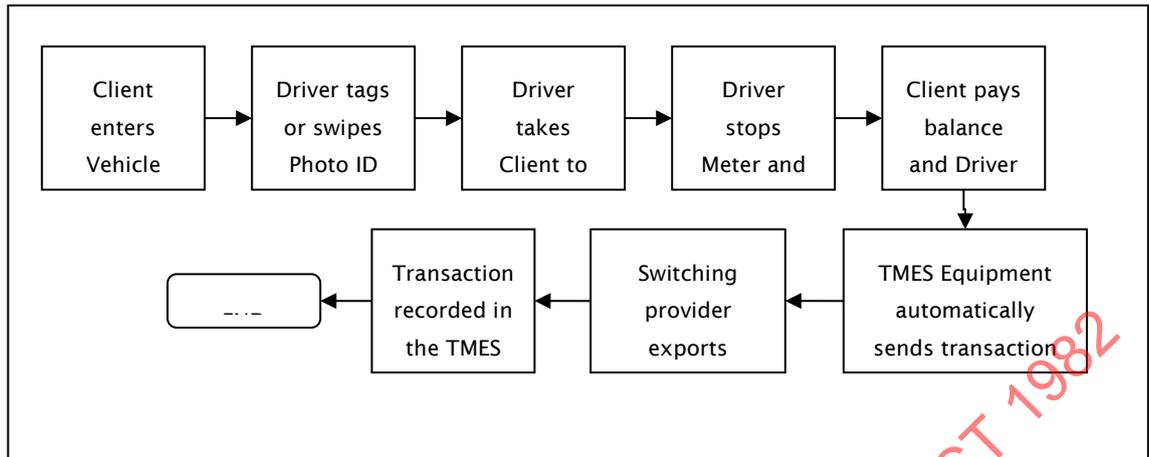
- 6.2 The Contractor and Drivers will assist and co-operate with Greater Wellington or its personnel in the investigation of any complaints or reports of abuse or misuse or poor service and, if directed by Greater Wellington, the Contractor will conduct its own internal investigation.
- 6.3 Where the subject of the complaint relates to allegations of non-compliance with the requirements of this Agreement, then the Contractor will advise the details of the complaint to Greater Wellington at the earliest opportunity.
- 6.4 Should the Complainant wish to remain anonymous, and the complaint is of a nature described in 6.3 above then the Contractor should advise the Complainant that Greater Wellington will treat the Complainants anonymity with the same care as it applies to its own staff under its internal Protected Disclosures Policy<sup>22</sup>.

## 7. TMES requirements and processes

- 7.1 The Contractor will comply with Schedule 5 of this Agreement.
- 7.2 The Contractor is responsible for the input of all data necessary for the operation of the TMES, including: individual Driver details, Vehicle details, and transaction information.
- 7.3 All TMES Equipment required to be provided by the Contractor for the operation of the TMES is specified in Schedule 6.
- 7.4 The TMES equipment set-up process is attached as Schedule 7.
- 7.5 The Contractor will undertake all processes in accordance with those stated in the TMES Guidelines and Procedures.
- 7.5.1 Photo ID Cards issued by Greater Wellington and AT are used to generate the electronic transactions. The Contractor must ensure that Drivers carry out the photo ID card acceptance procedures detailed in the Driver Terms and Conditions of Access.
- 7.5.2 Figure 1 below shows the standard electronic transaction process overview that applies to all transactions using the TMES Equipment.

**Figure 1: Electronic transaction process overview**

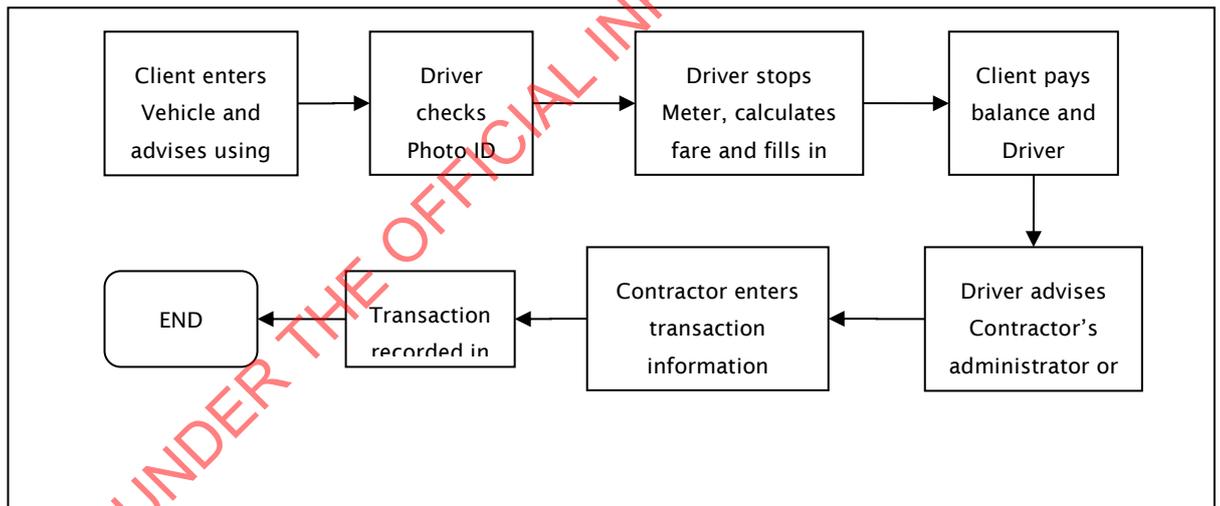
<sup>22</sup> The Protected Disclosures Policy is Greater Wellington's internal procedure for receiving and dealing with information about serious wrongdoing, commonly referred to as 'whistleblowing'.



7.5.3 For acceptance of Vouchers the Contractor and the Driver must follow the procedures as illustrated in Figure 2:

- g) whenever a Client presents an “out of town” Voucher, which is a Total Mobility Voucher issued by another regional council (other than Greater Wellington); or
- h) whenever a Client presents a valid Greater Wellington blue (supported Client) Voucher.

Figure 2: Client voucher process overview



**8. TMES Equipment failure**

8.1 The cost of repair or reinstatement to any TMES Equipment shall be met by either the Contractor or the Driver in an arrangement to be agreed by them.

8.2 Greater Wellington will not be held liable for any cost of repair or reinstatement to the TMES Equipment.

8.3 In the event of known failure of TMES Equipment no Services shall be undertaken and the TMES Equipment repaired as soon as possible.

8.4 Only when the TMES equipment has failed on entry to the Vehicle by a Client must the process detailed in Appendix 1 of the Driver Terms and Conditions of Access be followed.

## Schedule 2: Fees and Invoicing

### 1. Fees

- 1.1 Subsidy Payment – Unless otherwise notified by Greater Wellington of a variation to the Subsidy, Greater Wellington will pay to the Contractor a Subsidy of 50% of the Fare or Agreed Cost of Travel up to a maximum of \$40.00 (including GST) per Trip provided the Contractor complies fully with all its obligations in this Agreement, including, without limitation, that the Driver complies fully with the Driver Terms and Conditions of Access.
- 1.2 Hoist Payment – Unless otherwise notified by Greater Wellington of a variation to the Hoist Payment, Greater Wellington will pay a Hoist Payment to the Contractor of \$11.50 (including GST) for each trip conducted in a Hoist Vehicle provided the Contractor complies fully with all its obligations in this Agreement, including, without limitation, that the Driver complies fully with the Driver Terms and Conditions of Access.

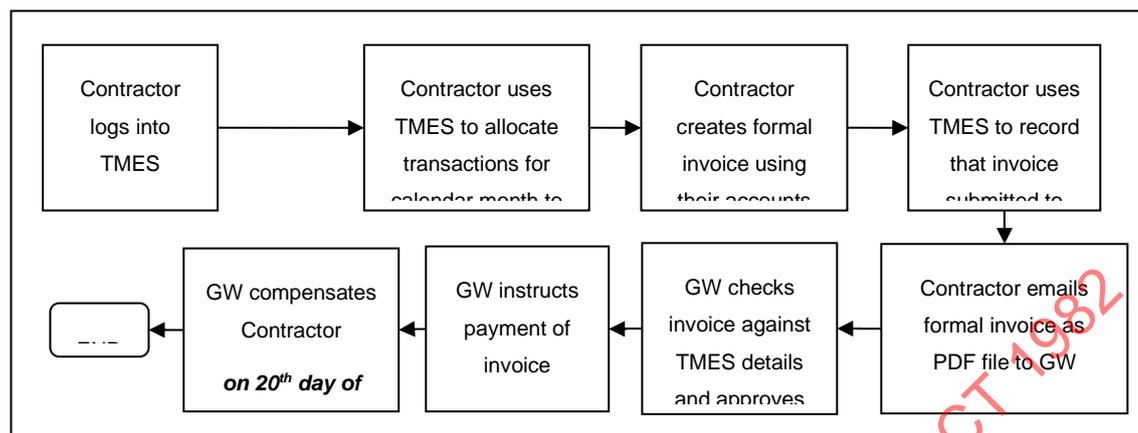
### 2. Invoicing

- 2.1 The Contractor shall issue a GST invoice for Subsidy and Hoist Payments that relate to Trips occurring over the course of a calendar month.
- 2.2 The Contractor shall issue the GST invoice no later than the 7<sup>th</sup> day of the month following the calendar month for which Payment is being sought and it must contain the following information:
- a) The word 'tax invoice' in a prominent position;
  - b) The Contractor's full name (and GST registration number)
  - c) The full name and address of Greater Wellington;
  - d) The date that the invoice is issued;
  - e) The description of services supplied to which the invoice relates;
  - f) The amount payable by Greater Wellington showing;
    - i. The consideration in respect to the Subsidy (excluding GST)
    - ii. The consideration in respect to the Hoist payment (excluding GST)
    - iii. The amount of GST; and
    - iv. The total amount payable (the consideration including GST)

### 3. Invoicing Process Overview

- 3.1 The Contractor must ensure its invoicing process is compliant with this Schedule and the TMES Guidelines and Procedures. Figure 3 provides an overview of the invoicing process.

Figure 3: Invoicing process overview



## Schedule 3: Driver Training Standards

There are two Driver training options available to the Contractor:

### 1. Option 1

1.1 The Contractor will ensure that all Hoist Vehicle Drivers providing Services are trained in the following unit standards:

- a) NZQA Unit Standard 1748 Passenger Service: Demonstrate Skills Required to Assist Passengers with Special Needs; and
- b) NZQA Unit Standard 15165 Transport Passengers in Wheelchairs Using total Mobility Vehicles Equipped with hoist or Ramp.

1.2 The Contractor will ensure all Drivers of Vehicles must be trained in the following unit standards:

- a) NZQA unit Standard 1748 Passenger Service: Demonstrate Skills Required to Assist Passengers with Special Needs.

### 2. Option 2

2.1 The Contractor will provide a Greater Wellington approved training course by providing its own trained 'Work Place Assessor'. Prior to obtaining 'Work Place Assessor' status the assessor must have completed the following unit standards:

- a) NZQA Unit Standard 4098 'How to Use Standards to Assess Candidate's Performance'; and
- b) NZQA Unit Standard 11281 'Prepare Candidates for Assessment Standards'; and
- c) NZQA Unit Standard 1748 Passenger Service: Demonstrate Skills Required to Assist Passengers with Special Needs; and
- d) NZQA Unit Standard 15165 Transport Passengers in Wheelchairs Using total Mobility Vehicles Equipped with Hoist or Ramp.

2.2 Following successful completion of these unit standards the Contractor must ensure the assessor has applied for and obtained registration as a 'Work Place Assessor' from the New Zealand Motor Industry Training Organisation (MITO), [www.mito.org.nz](http://www.mito.org.nz).

2.3 Greater Wellington requires the Contractor's 'Work Place Assessor' to incorporate into the Contractor's Driver training programme the following:

- (a) The Taxi Federation and NZTA (previously Transit NZ) training video and pocket guide 'Total Mobility System - Training Drivers to Transport People with Disabilities'. This is available from the Taxi Federation.
- (b) Driver information and TMES equipment training pack

### Schedule 4: TMES Guidelines and Procedures for Contractors

The following TMES Guidelines and Procedures for Contractors (as updated from time to time and subject to Greater Wellington’s right to vary any aspect at its sole discretion, at any time, upon prior notice to the Contractor). The up to date version is available through the TMES home page for Contractors by selecting [Help].

### Schedule 5: Terms of Use for users of the Total Mobility Electronic System

The following Terms of Use (as updated from time to time and subject to Greater Wellington’s right to vary any aspect at its sole discretion, at any time, upon prior notice to the Contractor). The up to date version is available through the TMES home page for Contractors by selecting [Terms of Use].

### Schedule 6: TMES Equipment

The current TMES Equipment standard as at the Commencement Date is described in the images below:

*Note that as per clause 13.1 of this Agreement the Contractor will be required to upgrade TMES Equipment at its own cost as Greater Wellington requires, particularly in respect to linking between individual components of the TMES Equipment and any Meter or distance measuring equipment.*



**PAX SP30 SECURE PIN PAD**

The PCI PTS certified SP30 leads the market for secure PIN pads by adding payment terminal functionality to a PIN pad. The SP30 offers options for adding a contactless card reader, magnetic card reader, and/or IC card reader. In addition, the SP30 is equipped with a large 128x64 pixel LCD with four lines of display and three additional function keys located under the display to enable fast and user friendly payment options. Best of all, the SP30 is a sleek and compact device that easily fits in the palm of your hand. When connected to an ECR or POS terminal, the SP30 is the perfect device to streamline your electronic payment system.

Key Features
Powerful 32-bit, ARM9 CPU
Large Memory Capacity
DES and 3DES encryption
Three (3) Function Keys
Multi-Application support
PCI PTS Online and Offline certified
Ruggedized and stylish

*Payment Platforms For Long Term Growth*

**PAX SP30 SECURE PIN PAD**

Component	Default Specification
CPU	32-bit ARM9
Memory	4MB FLASH, 8MB SDRAM
Display	128x64 pixel LCD, LED backlight
Keypad	10 alphanumeric keys, three (3) functional keys plus clear, enter and cancel keys.
Power Supply	DC 4.5V ~ DC5.5V, 500mA
Peripheral Port	One (1) RS232
Working Environment	Temperature: 32F ~ 122F (0°C ~ 50°C) R.H.: 10% ~ 90% (non-condense)
Storage Environment	Temperature: -4F ~ 158F (-20°C ~ 70°C) R.H. 10% ~ 90% (non-condense)
Dimensions	6.65in x 3.03in x 1.97in (LxWxH, incl. privacy shield) (169mm x 77mm x 50mm)
Weight	12.35 oz (350g)

Options
Built-In Contactless Card Reader module (ISO/IEC14443, 4 LEDs; RF indicator)
Magnetic Card Reader (ISO7811, Track 1/2/3, bi-directional swipe)
IC Card Reader (EMV2000 compliant)
SAM slots, two(2) up to four (4), ISO7816
USB Port



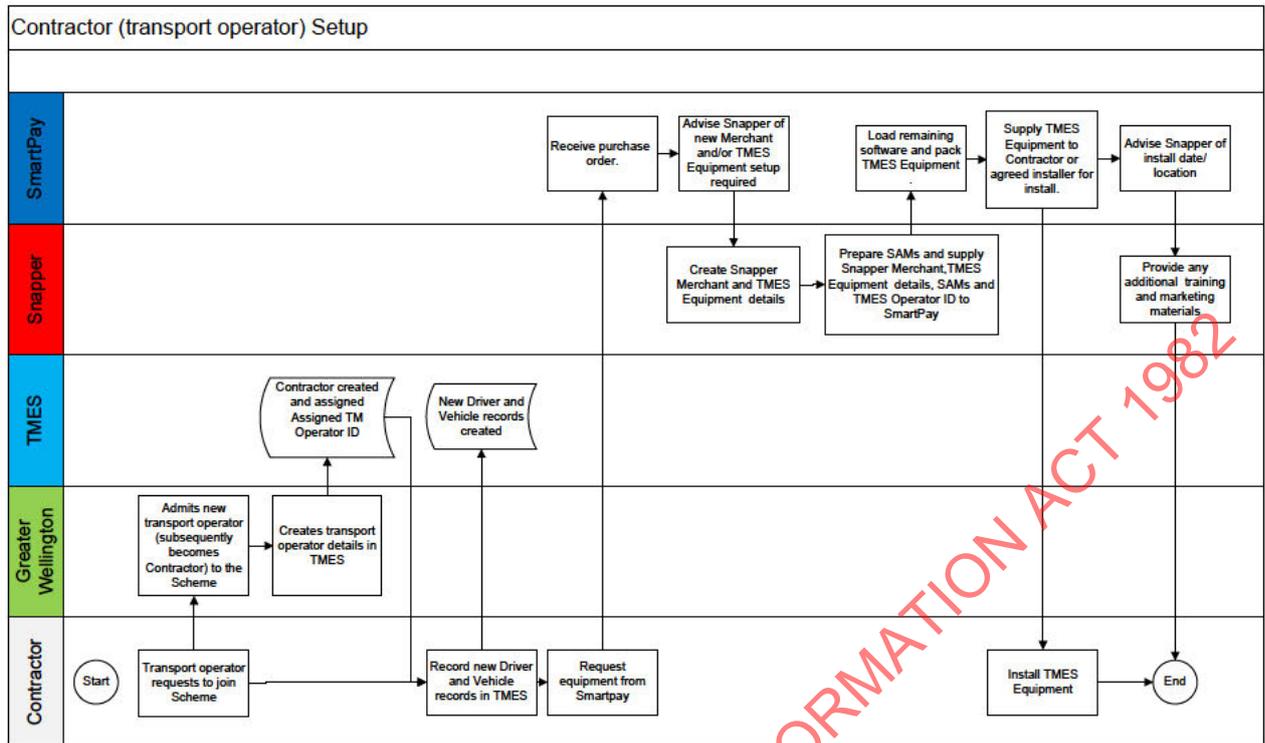





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### Schedule 7: TMES Equipment Set-up Process

The following flow-process is necessarily generic and may be subject to variation dependant on the individual requirements of the Contractor.



**Schedule 8: Driver Terms and Conditions of Access to the Total Mobility Scheme.**

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# Document 15

**From:** [Annette Meates](#)  
**To:** s 9(2)(a)  
**Cc:** [Whitney Adam](#)  
**Subject:** Number of Total Mobility Hoist trips taken  
**Date:** Friday, 25 October 2024 10:04:03 am  
**Attachments:** [image001.png](#)

---

s 9(2)(a)

The number of hoist trips taken over the last 2 years is approximately as follows:

- For FY 22-23 - 270,922
- For FY 23-24 - 245,034

Calculating the total \$10.00 fee paid is straight forward.

Ngā mihi

Annette Meates (she/her)  
Principal Advisor Public Transport  
Te Toki Tūhono – Transport Services, Multimodal Integration

s 9(2)(a)

## **NZ Transport Agency Waka Kotahi**

44 Bowen Street

Private Bag 6995, Wellington 6141, New Zealand

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# Document 16

**From:** [Annette Meates](#)  
**To:** [Whitney Adam](#)  
**Subject:** RE: Total Mobility - funding questions  
**Date:** Friday, 2 August 2024 4:32:30 pm  
**Attachments:** [image001.png](#)  
[image002.png](#)

---

Kia ora Whitney  
Some responses below;

## 1. How the TM scheme is administered

PTAs have responsibility for the day-to-day management of the Total Mobility scheme and have agreements in place with transport operators in each region.

The Total Mobility scheme is managed by PTAs in line with policy and guidance set by the Ministry of Transport and NZTA.

The following publicly available documents outline how the scheme operates:

- *Total Mobility scheme: policy guide for local authorities (July 2023)* outlines the background, policy and procedures for the scheme including roles and responsibilities of local authorities, such as training for drivers and assessors.

<https://www.nzta.govt.nz/assets/resources/total-mobility-council-guide/Total-mobility-scheme-local-authorities.pdf>

Item 1.4 in the above document outlines further what is required of PTAs to administer the scheme.

- *Total mobility around New Zealand: a regional guide to using the Total Mobility scheme (July 2023)* identifies the transport operators who provide wheelchair accessibility.

<https://www.nzta.govt.nz/resources/total-mobility-scheme/>

## 2. Tracking PTA spending

The Transport Investment Online (TIO) is the mechanism we use to capture and manages all NLTP activities, including monthly expenditure on Total Mobility.

There are 3 activity classes for TM;

- 517 - TM operations
- 519 – wheelchair hoist installation
- 521 - payments for wheelchair hoist use

## 3. Training

In the first link above under item 5.2 I noticed it said, **The cost of providing the training will be financially assisted by Waka Kotahi at the local authority's funding assistance rate through work category 517: Total Mobility operations.**

I realised this is different to what I said yesterday, apologies. I'll need to find out how we determine if at all, how the operations funding line is broken down to show any training spend. So I shall follow up on this and come back to you.

## 4. Reporting to MoT

We don't report directly to MoT on the TM scheme.

Hope that is helpful for now. Have a good weekend and talk more next week.

Ngā mihi

Annette Meates (she/her)  
Principal Advisor Public Transport  
Te Toki Tūhono – Transport Services, Multimodal Integration

s 9(2)(a)

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---

**From:** Whitney Adam s 9(2)(a)  
**Sent:** Thursday, August 1, 2024 6:12 PM  
**To:** Annette Meates s 9(2)(a)  
**Cc:** Julia Harker s 9(2)(a)  
**Subject:** RE: Total Mobility - funding questions

Hi Annette

Thanks for the call earlier.

In addition to the questions we talked about, could you provide a short summary on how the TM scheme is administered by NZTA ie how PTA spending is tracked and then how (or to what extent) that is reported to MOT?

Thanks  
Whitney

---

**From:** Annette Meates s 9(2)(a)  
**Sent:** Thursday, August 1, 2024 12:38 PM  
**To:** Whitney Adam s 9(2)(a)  
**Cc:** Julia Harker s 9(2)(a)  
**Subject:** RE: Total Mobility - funding questions

Kia ora Whitney

On your questions below perhaps an initial phone call is helpful. In the interim some points below will answer most questions.

I am available this afternoon from 3.30pm if that works for you?

1. Funding split / breakdown

The cost of Total Mobility is funded as follows;

- 50% is NLTP and Local share – this 50% has a further split within it, of which 40% is paid by the PTA, and 60% is from the NLTP. This is aligned to the Funding Assistant Rates (FAR) that is applied to most transport investments across the country.
- 25% is Crown Funding
- 25% is from the user

2. Hoist funding

The FAR rate of 60% is applied to Hoist purchase and installation costs. PTAs know this and it is on our website [Hoist Funding Assistance Rate](#)

There is a \$10 fee for every occasion that a hoist is used. This amount is fully funded at 100% by the NLTP (no contribution from the PTA) and no charge to the user.

Funding is only used for the cost of the trip and hoist installation and use.

3. Funding in 2023-24 was \$57,805 million

TM Funding in 2023-24			
Local			15580
NZTA funding			25882
Crown / Community Connect funding			16343
<b>total</b>			<b>57805</b>

Happy for you to book a call if that is helpful.

Ngā mihi

Annette Meates (she/her)  
Principal Advisor Public Transport  
Te Toki Tūhono – Transport Services, Multimodal Integration

s 9(2)(a)

**NZ Transport Agency Waka Kotahi**

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**From:** Whitney Adam s 9(2)(a)

**Sent:** Wednesday, July 31, 2024 10:19 AM

**To:** Andrew Wilson s 9(2)(a) Julia Harker s 9(2)(a)

Annette Meates s 9(2)(a)

**Subject:** RE: Total Mobility - funding questions

Great, thanks Andrew. Happy to talk over the phone Annette – perhaps a teams call instead of mobile? I'm online today and tomorrow, Thursday or next week Wednesday to Friday.

---

**From:** Andrew Wilson s 9(2)(a)

**Sent:** Wednesday, July 31, 2024 10:15 AM

**To:** Julia Harker s 9(2)(a) Whitney Adam s 9(2)(a)

Annette Meates s 9(2)(a)

**Subject:** RE: Total Mobility - funding questions

Hi Whitney,

Annette is increasingly across all things Total Mobility will be best placed to help.

[@Annette Meates](#) see below. Please touch base with Whitney and support as needed.

Ngā mihi

**Andrew Wilson** (he/him)

**Team Leader / Public Transport**

s 9(2)(a)

---

**From:** Julia Harker s 9(2)(a)

**Sent:** Wednesday, July 31, 2024 8:08 AM

**To:** Whitney Adam s 9(2)(a) Andrew Wilson

s 9(2)(a)

**Subject:** RE: Total Mobility - funding questions

Kia ora Whitney

Andrew and his team are probably best placed to help you with these funding queries.

Ngā mihi

Julia

---

**From:** Whitney Adam s 9(2)(a)

**Sent:** Tuesday, July 30, 2024 5:05 PM

**To:** Andrew Wilson s 9(2)(a) Julia Harker s 9(2)(a)

**Subject:** Total Mobility - funding questions

Hi Andrew and Julia

s 9(2)(f)(iv)

Part of that is creating a clear picture of how funding is currently broken down.

Here are some questions - could you please help with them:

- **Installation of wheelchair hoists and ramps** – do PTAs provide co-funding to vehicle operators to install wheelchair hoists and ramps, or is this only funded through the NLTF? Do any PTAs provide any additional funding, on top of NLTF, to encourage the supply of wheelchair hoist and ramp vehicles?
- **Installation of wheelchair hoists and ramps** – the NLTF funds grants vehicle operators 60% of the cost to install wheelchair hoists and ramps. How was the 60% figure chosen (if known)?
- **Breakdown of use of funding** – please assist with the table below.

	<b>Funding source</b>	<b>Funding in 2023/24</b>
Trip fare subsidies (to cap)	75% made up of: NLTF (30 percent) Crown (25 percent) PTAs (20 percent)  People who take the trip (25 percent)	\$21.7 million \$12 million \$12 million
Fees to reimburse drivers for using wheelchair hoists (\$10/trip)	NLTF only? Do PTAs provide any funding?	
Vehicle modifications (up to 60% of cost)	NLTF only? Do PTAs provide any funding?	
<i>Is funding used for any other purposes? Admin? Training / certifying of drivers etc?</i>	??	

Thanks

Whitney

**Whitney Adam** ([she/her](#))

Kaitohutohu Matua | Senior Adviser, Urban Development and Public Transport  
Auckland Policy Office

**Te Manatū Waka Ministry of Transport**

My working days are Wednesday, Thursday and Friday



---

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# Document 17

**From:** [Annette Meates](#)  
**To:** [Kathleen Wong](#)  
**Cc:** [Leah Coghill](#); [Whitney Adam](#); [Callum Gill](#)  
**Subject:** RE: Total Mobility Data  
**Date:** Thursday, 15 August 2024 1:41:12 pm  
**Attachments:** [image001.png](#)  
[image002.png](#)

Kia ora Kathleen  
See responses in red below.

Ngā mihi

Annette Meates (she/her)  
Principal Advisor Public Transport  
Te Toki Tūhono – Transport Services, Multimodal Integration

s 9(2)(a)

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---

**From:** Kathleen Wong s 9(2)(a)  
**Sent:** Thursday, August 15, 2024 11:42 AM  
**To:** Annette Meates s 9(2)(a)  
**Cc:** Leah Coghill s 9(2)(a); Whitney Adam s 9(2)(a); Callum Gill s 9(2)(a)  
**Subject:** RE: Total Mobility Data

Thanks Annette, this is really helpful for us

We have a few follow up questions:

- Does NZTA have oversight or an idea of wheelchair accessible vehicles (small vehicles and vans) that are in operation in NZ that sit outside of the TM scheme? **No, NZTA does not collect any data about this. This information is not readily available in the motor vehicle register either. I spoke with a member of that team today and they advised that when a vehicle gets modified there may be a way to find this out, but it is not readily available.**
- What standards do the vehicles and drivers have to meet to operate a wheelchair accessible vehicle? **There is a raft of legislative requirements for vehicle standards including wheelchair accessibility and information on the NZTA website about this. A few useful links below, <https://vehicleinspection.nzta.govt.nz/virms/hvsc/occupant-features/wheelchair-restraints> <https://www.nzta.govt.nz/driver-licences/getting-a-licence/medical-requirements/disabilities-and-driving/> this link includes information about who can modify a vehicle. <https://www.nzta.govt.nz/assets/resources/factsheets/31/docs/31-disabilities-injuries-and-driving.pdf> Training for operating such a vehicle is undertaken by PTAs.**
- Does NZTA have any data to understand what the demand is for wheelchair vehicle bookings, the availability of those vehicles, and the ability for people to book them (noting the feedback we've had in the past from PTAs about taxi driver conduct [i.e. prioritising SESTA or a non-wheelchair trip])? **We don't have data but we do hear the same anecdotal point you refer to, which is that during peak travel hours there is often a shortage of vehicles due to operators prioritising SESTA ETC.**

Ngā mihi nui,  
Kathleen Wong (she / her)  
Kaitohutohu | Adviser – Urban Development and Public Transport  
Te Manatū Waka - Ministry of Transport  
s 9(2)(a) [www.transport.govt.nz](http://www.transport.govt.nz)



---

**From:** Annette Meates s 9(2)(a)  
**Sent:** Wednesday, August 14, 2024 5:05 PM  
**To:** Kathleen Wong s 9(2)(a)  
**Cc:** Leah Coghill s 9(2)(a); Whitney Adam s 9(2)(a); Callum Gill s 9(2)(a)  
**Subject:** RE: Total Mobility Data

Hi Kathleen

I had the below to hand for another reason and it may address your enquiry? It is the number of wheelchair accessible vehicles in the TM scheme taken from the Annual Return from PTAs. It does not include buses or train that are also wheelchair accessible. We would not have visibility of not for profit organisations.

**Number of wheelchair accessible vehicles within the Total Mobility scheme as reported by Public Transport Authorities**

Region	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23
Auckland	128	130	150	129	152	133	140	131	153
Bay of Plenty	13	13	17	17	17	16	19	24	29

Canterbury	44	49	53	46	50	46	48	46	47
Gisborne	4	4	4	4	4	4	1	1	2
Hawkes Bay	19	22	24	25	24	23	24	25	27
Manawatu-Whanganui	16	17	22	12	15	16	16	17	19
Marlborough-Nelson-Tasman	9	10	12	12	11	10	10	9	9
Northland	2	2	2	4	4	6	6	6	7
Otago	17	15	17	18	19	20	23	19	16
Southland	6	6	9	9	8	8	8	10	10
Taranaki	7	6	6	8	10	10	10	12	12
Waikato	22	17	17	17	21	20	20	35	32
Wellington	38	42	46	41	42	41	37	42	39
West Coast	1	1	3	3	3	3	4	3	3
<b>TOTAL</b>	<b>326</b>	<b>334</b>	<b>382</b>	<b>345</b>	<b>380</b>	<b>356</b>	<b>366</b>	<b>380</b>	<b>405</b>

Happy to discuss if it was something else you needed.

Ngā mihi

Annette Meates (she/her)  
Principal Advisor Public Transport  
Te Toki Tūhono – Transport Services, Multimodal Integration

s 9(2)(a)

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Private Bag 6995, Wellington 6141, New Zealand  
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**From:** Kathleen Wong s 9(2)(a)  
**Sent:** Wednesday, August 14, 2024 11:50 AM  
**To:** Annette Meates s 9(2)(a)  
**Cc:** Leah Coghill s 9(2)(a) Whitney Adam s 9(2)(a) Callum Gill s 9(2)(a)  
**Subject:** Total Mobility Data

Kia ora Annette

Hope you're well

Does NZTA hold data on how many operating accessible small passenger vehicles there are in NZ (both profit and not-for-profit)?

Ngā mihi nui,  
**Kathleen Wong** (she / her)  
Kaitohutohu | Adviser – Urban Development and Public Transport  
**Te Manatū Waka - Ministry of Transport**  
s 9(2)(a) | [www.transport.govt.nz](http://www.transport.govt.nz)



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## Document 18

**From:** [Annette Meates](#)  
**To:** [Whitney Adam](#)  
**Subject:** RE: Total Mobility Data Analysis - cost and usage trends 2019-2024  
**Date:** Tuesday, 3 September 2024 12:37:10 pm  
**Attachments:** [image001.png](#)  
[TM data Report V3.2.pdf](#)

---

Kia ora Whitney here is the tidied up version. Delete the other one sent.  
Talk soon

Ngā mihi

Annette Meates (she/her)  
Principal Advisor Public Transport  
Te Toki Tūhono – Transport Services, Multimodal Integration

s 9(2)(a)

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**From:** Whitney Adam s 9(2)(a)  
**Sent:** Thursday, August 29, 2024 10:53 AM  
**To:** Annette Meates s 9(2)(a)  
**Subject:** RE: Total Mobility Data Analysis - cost and usage trends 2019-2024

Hi Annette – all good.

Thanks  
Whitney

---

**From:** Annette Meates s 9(2)(a)  
**Sent:** Thursday, August 29, 2024 10:36 AM  
**To:** Whitney Adam s 9(2)(a)  
**Subject:** RE: Total Mobility Data Analysis - cost and usage trends 2019-2024

Hi Whitney  
Letting you know I spotted a date mistake in the report, but will send a final version next week after talking with Talia.

Ngā mihi

Annette Meates (she/her)  
Principal Advisor Public Transport

s 9(2)(a)

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**From:** Whitney Adam s 9(2)(a)  
**Sent:** Thursday, August 29, 2024 9:33 AM  
**To:** Annette Meates s 9(2)(a)  
**Subject:** RE: Total Mobility Data Analysis - cost and usage trends 2019-2024

Great, thank you Annette!

---

**From:** Annette Meates s 9(2)(a)  
**Sent:** Thursday, August 29, 2024 8:49 AM  
**To:** Whitney Adam s 9(2)(a)  
**Cc:** Nick Potter s 9(2)(a)  
**Subject:** RE: Total Mobility Data Analysis - cost and usage trends 2019-2024

Mōrena Whitney

Yes of course, happy for you to share with your team.

On your last point we think we'll put it on our website, but let me confirm that first. I am meeting with Talia about it on Monday so will confirm after that.

Ngā mihi

Annette Meates (she/her)  
Principal Advisor, Public Transport  
Te Toki Tūhono – Transport Services, Multimodal Integration

s 9(2)(a)

**NZ Transport Agency Waka Kotahi**

44 Bowen Street

Private Bag 6995, Wellington 6141, New Zealand

[Connect with us on social media](#)ōrena Whitney



**From:** Whitney Adam s 9(2)(a)  
**Sent:** Wednesday, August 28, 2024 4:44 PM  
**To:** Annette Meates s 9(2)(a)  
**Cc:** Nick Potter s 9(2)(a)  
**Subject:** RE: Total Mobility Data Analysis - cost and usage trends 2019-2024

Hi Annette

Thanks for sharing this. We will have a read.

Noted re wider distribution – would it be okay to share it with my Ministry of Transport colleagues working on the Total Mobility review, with a caveat not to share wider? These people would be Callum Gill, Kathleen Wong and Jessica Ranger.

In terms of content that could be used once it is released to PTAs, would there be anything that we cannot use in the public discussion document?

Thanks  
Whitney

---

**From:** Annette Meates s 9(2)(a)  
**Sent:** Wednesday, August 28, 2024 4:04 PM  
**To:** Whitney Adam s 9(2)(a); Nick Potter s 9(2)(a)  
**Subject:** Total Mobility Data Analysis - cost and usage trends 2019-2024

Kia ora Nick and Whitney

Attached is the NZTA data analysis undertaken to assess user cost and trends for the TM scheme. Note this is a data analysis only and does not make any recommendations at this stage.

We will share it next week with PTAs so not for wider distribution just yet.  
Happy to discuss it contents further if that is helpful.

Ngā mihi

Annette Meates (she/her)  
Principal Advisor Public Transport  
Te Toki Tūhono – Transport Services, Multimodal Integration

s 9(2)(a)

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# Document 19

**From:** [Annette Meates](#)  
**To:** [Whitney Adam](#)  
**Cc:** [Kathleen Wong](#); [Adam Lawrence](#)  
**Subject:** RE: Total Mobility users - demographic profile  
**Date:** Thursday, 12 September 2024 4:51:47 pm  
**Attachments:** [image002.png](#)  
[image003.png](#)

Kia ora Whitney

We don't ask for this type of information from PTAs.

Some PTAs may have this information through their eligibility assessment process, but I think as you have found already it will be inconsistent across the country.

I can make enquiries to see how well this information might be being collected and come back to you.

Ngā mihi

Annette Meates (she/her)  
 Principal Advisor Public Transport  
 Te Toki Tūhono – Transport Services, Multimodal Integration

s 9(2)(a)

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**From:** Whitney Adam s 9(2)(a)  
**Sent:** Thursday, September 12, 2024 4:36 PM  
**To:** Annette Meates s 9(2)(a)  
**Cc:** Kathleen Wong s 9(2)(a); Adam Lawrence s 9(2)(a)  
**Subject:** Total Mobility users - demographic profile

Hi Annette

Thanks for the call yesterday about Total Mobility.

I meant to raise yesterday - we've been working on building up a high-level demographic profile of Total Mobility users, and how that has changed over time. Kathleen has contacted most PTAs individually and they've provided variable information, partly extracted from Ridewise and from their own TM surveys, if they have done them.

We're aware of holes in the data though.

So that we are not doubling up on this, I wanted to check whether NZTA have a demographic profile of users by PTA area? Specifically, things like age, type of disability/ies, gender, ethnicity and how this has changed over time. For example, we're trying to answer questions like whether the people using TM who are older are presenting disabilities that are age related.

This is the table format we're compiling the info into (it's very draft, missing lots of PTAs), but as an idea:

Region	Auckland Transport	Greater Wellington Regional Council	Environment Canterbury	Bay of Plenty	Waikato Regional Council	Otago Regional Council	Invercargill City Council
Age	Due to population aging the On Demand Mobility team expects the demand for TM services to increase substantially between 2023 and 2030.  Currently approximately 73 percent of clients are over age 65.  AT admits children to the TM scheme once they reach	As of August 2024: <ul style="list-style-type: none"> <li>0-9: 53</li> <li>10-19: 368</li> <li>20-29: 597</li> <li>30-39: 553</li> <li>40-49: 627</li> <li>50-59: 1096</li> <li>60-69: 1787</li> <li>70-79: 3294</li> <li>80-89: 5171</li> <li>90-99: 2695</li> <li>100-109: 104</li> </ul> Based off export of active profile, the larger number of 0-9 & 100-109 is due to <ul style="list-style-type: none"> <li>incorrect birthdays</li> <li>temporary cards</li> </ul>	As of September 2024: <ul style="list-style-type: none"> <li>&lt;20: 1%</li> <li>21-60: 12%</li> <li>61+: 87%</li> </ul>	Range between 6-103yrs old  As of 2023: <ul style="list-style-type: none"> <li>New clients 1130</li> <li>&lt;20: 30</li> <li>21-60: 121</li> <li>61-80: 368</li> <li>81+: 611</li> </ul> As of 2024: <ul style="list-style-type: none"> <li>New clients 1501</li> <li>&lt;20: 50</li> <li>21-60: 217</li> <li>61-80: 499</li> <li>81+: 735</li> </ul>			In the last 12 months, 437 new clients were added to the scheme in Southland: <ul style="list-style-type: none"> <li>&lt;20 = 16</li> <li>21-60 = 62</li> <li>61-80 = 168</li> <li>80+ = 191</li> </ul> Up until recently, the client D.O.B. wasn't mandatory, so we only have mixed data on the age of our entire client base – see below.  <b>Complete Age range summary</b>

	intermediate school age. Below this age we do not think that any children travel independently.	<ul style="list-style-type: none"> <li>(90-109) not being informed of a customer's passing</li> <li>missing customers with no birthday entered</li> </ul> <p>All time:</p> <ul style="list-style-type: none"> <li>No age provided: 2082</li> <li>0-16: 483</li> <li>17-29: 1052</li> <li>30-64: 4783</li> <li>65+: 19584</li> </ul>				<ul style="list-style-type: none"> <li>0-10 =8*</li> <li>11-20 =26</li> <li>21-30 =90</li> <li>31-40 =58</li> <li>41-50 =62</li> <li>51-60 =156</li> <li>61-70 =248</li> <li>71-80 =482</li> <li>81-90 =704</li> <li>90+ =307<sup>[1]</sup></li> <li>Not defined = 170</li> </ul>
Disability types	<p>We have an extremely wide range of disabilities:</p> <ul style="list-style-type: none"> <li>Epilepsy</li> <li>cerebral palsy</li> <li>dementia</li> <li>anxiety</li> <li>low blind vision</li> <li>hearing impaired</li> <li>wheelchair users</li> </ul> <p>Many clients live with multiple issues (particularly as they age). We have seen an increase in clients with anxiety issues since Covid.</p>	<p>Clients have one or more of the following:</p> <ul style="list-style-type: none"> <li>Mobility</li> <li>Sensory</li> <li>Intellectual</li> <li>Mental health</li> <li>Neurological</li> </ul>	<p>Clients have one or more of the following:</p> <ul style="list-style-type: none"> <li>Mobility</li> <li>Sensory</li> <li>Intellectual</li> <li>Metal health</li> <li>Neurological</li> </ul> <p>No specific reports, but note there are agencies that assess clients for eligibility in disability fields their organisations specialise in. They note</p> <ul style="list-style-type: none"> <li>8% of active clients have neurological impairments<sup>[2]</sup></li> <li>6% of active users have sensory impairments</li> <li>1% of active users have intellectual impairments</li> <li>85% of active users have a combination of either physical, mental health or multiple impairments.</li> </ul>	<p>Clients have one or more of the following:</p> <ul style="list-style-type: none"> <li>Mobility</li> <li>Sensory</li> <li>Intellectual</li> <li>Metal Health</li> <li>Neurological</li> </ul>	<p>Currently 2311 Active Clients in total with multiple</p> <ul style="list-style-type: none"> <li>Sensory: 626</li> <li>Physical: 1580</li> <li>Neurological: 666</li> <li>Mental: 281</li> <li>Intellectual: 205</li> </ul> <p>Not Specified = 257 (these are the clients who were transferred over to Ridewise in 2018 conversion from our previous paper-based system. Impairment types for existing clients were not researched and entered)</p>	

Does that make sense? I can also give you a call if easier.

Thanks  
Whitney

**Whitney Adam** ([she/her](#))  
Senior Adviser | Urban Development and Public Transport  
Auckland Policy Office  
Ministry of Transport Te Manatū Waka

My working days are Wednesday, Thursday and Friday



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<sup>[1]</sup> From ICC: I would treat all age data collected for the 0-10 range and 90+ range with caution. Since D.O.B. became mandatory in Ride Wise, to update a client's address, we've needed the client's date of birth, meaning a faux d.o.b. being entered on occasion to get the address up-to-date - hence the very old or very young age data anomaly.

<sup>[2]</sup> \*The number of active users with neurological impairments is likely higher than noted as there are a number of active clients that were registered with the Stroke Foundation, but this organisation has withdrawn from Total Mobility and their clients were transferred to a general agency recently.

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RELEASED UNDER THE OFFICIAL INFORMATION ACT 1982

From: [Annette Meates](#)  
 To: [Whitney Adam](#)  
 Cc: [Andrew Wilson](#)  
 Subject: Total Mobility summary 2021 - 24  
 Date: Friday, 9 August 2024 2:15:03 pm  
 Attachments: [image001.png](#)

Kia ora Whitney as discussed earlier in the week, below is a table that breaks down the Total Mobility spend by work category.

**Total Mobility Work Categories 517, 519, 521 - NLTP period  
 2021-22 to 2023-24**

WC 517: Total mobility operations	2021/22	2022/23	2023/24	2021-24
NLTF	10,981,256	14,066,382	23,173,438	48,221,076
Local Share	7,320,836	9,377,586	15,448,957	32,147,379
Crown appropriation	-	8,045,514	12,136,020	20,181,534
<b>Total</b>	<b>18,302,092</b>	<b>31,489,482</b>	<b>50,758,415</b>	<b>100,549,989</b>

WC 519: Total Mobility wheelchair hoists and ramps	2021/22	2022/23	2023/24	2021-24
NLTF	111,339	169,206	197,030	477,575
Local Share	74,226	112,803	131,354	318,383
Crown appropriation	-	-	-	-
<b>Total</b>	<b>185,565</b>	<b>282,009</b>	<b>328,384</b>	<b>795,958</b>

WC 521: Payments for Total Mobility wheelchair hoists and ramps	2021/22	2022/23	2023/24	2021-24
NLTF	1,819,728	2,444,084	2,511,993	6,775,805
Local Share	-	-	-	-
Crown appropriation	-	-	-	-
<b>Total</b>	<b>1,819,728</b>	<b>2,444,084</b>	<b>2,511,993</b>	<b>6,775,805</b>
			<b>total over 3 years</b>	<b>108,121,752</b>

Regarding the report which analyses data for the last 5 years, there are still some edits taking place at this end, so I'll have it to you next week.

Please call if you have any questions about the above table.

Ngā mihi

Annette Meates (she/her)  
 Principal Advisor Public Transport  
 Te Toki Tūhono – Transport Services, Multimodal Integration

s 9(2)(a)

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**Date** 15 April 2025

**Subject** Response to Ministry of Transport questions on Total Mobility

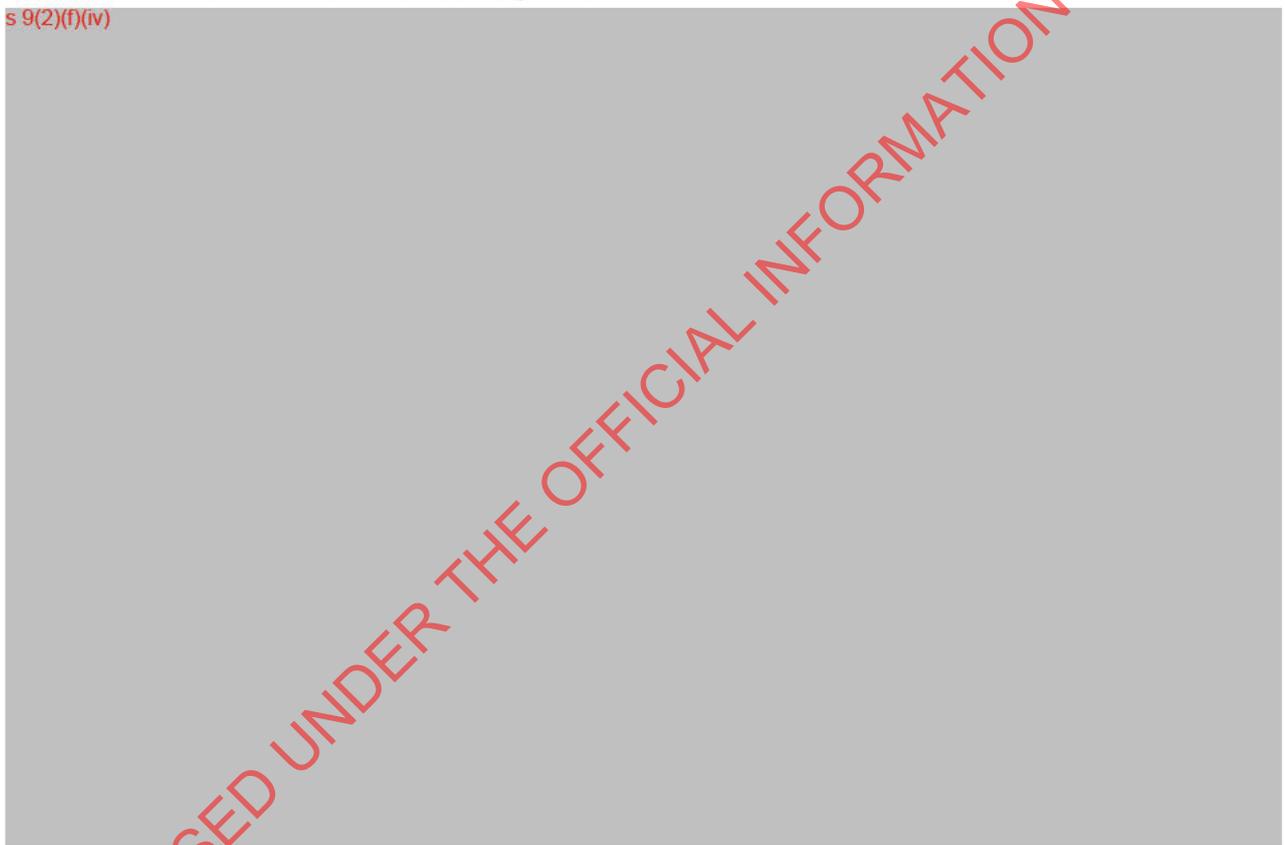
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## Questions and answers

1. **Q:** Provide table showing what was forecasted/budget for over the previous period and how this compares to the 2027-30 period (and how this looks for the different shares).

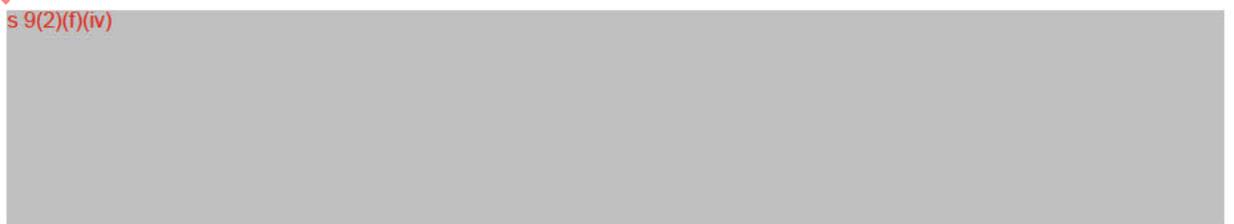
**A:** The following table provides forecast Crown fare concession funding requirements based on current demand trends and policy settings. CC funding is demand driven while SGC is bulk funded with an annual CPI adjustment.

s 9(2)(f)(iv)



2. **Q:** Show how the Crown Share is tracking (show the trend) but most importantly need to clearly state the scale what increase in the appropriation will be required for the next period i.e. a budget bid for budget 2026. There are lots of variations of numbers that I have seen so would like to get a single source.

s 9(2)(f)(iv)



3. **Q:** Provide table showing how demand has been increasing faster than was forecasted for. I was wondering if we could generate a table that outlines what was originally budgeted/forecasted expenditure for both Crown and NLTF and what was spent (maybe a graph would be useful). It would also be good how accurate forecasting has been.

**A:** Total expenditure and funding sources are shown in the Appendix. Base forecasts have identified significant and ongoing increases in TM demand due to several factors but there are no previous forecasts at a national level suitable for comparison.

The following table shows actual annual usage to Feb-25. This shows significant increases in the number of clients and TM trips per year. The number of trips per client has flattened off but the number of clients entering the scheme is continuing to increase rapidly. If we assume growth in trip rates flatten off, there remains a significant increase in demand due to clients entering the system.

**Table : Total Mobility usage data**

Report period	Active clients	Vehicle trips	Trips per client (annual)	Avg fare paid	Avg fare subsidy	Private revenue ratio
Mar-16 to Feb-17		1,614,299		8.60	8.40	50.5%
Mar-17 to Feb-18		1,609,167		8.90	8.80	50.4%
Mar-18 to Feb-19		1,689,522		9.40	9.20	50.4%
Mar-19 to Feb-20		1,739,851		9.70	9.30	50.9%
Mar-20 to Feb-21	37,669	1,500,443	39.8	8.50	11.90	41.6%
Mar-21 to Feb-22	37,765	1,460,800	38.7	10.90	10.30	51.6%
Mar-22 to Feb-23	40,274	1,799,117	44.7	7.40	17.70	29.5%
Mar-23 to Feb-24	46,696	2,318,768	49.7	8.00	20.30	28.3%
Mar-24 to Feb-25	52,688	2,696,526	51.2	8.20	20.60	28.6%

Note: Table excludes Hawke's Bay, Gisborne and West Coast as data not included in national admin system during full period of analysis

4. **Q:** Provide similar tables to above for CSC and Super gold.

**A:** Total expenditure and funding sources are shown in the Appendix. The above tables include CC PT and SGC funding forecasts. The following tables provides the demand inputs for both the CC and SGC appropriations.

**Table 3: Forecast demand for Crown fare concessions (by year)**

Year		Forecast passenger demand (000)				
		Community Connect scheme			SGC scheme	Crown
		TM	PT (CSC)	CC Total	SGC	Grand Total
21/22	Actual	1,561	-	1,561	9,246	10,807
22/23	Actual	2,187	-	2,187	11,573	13,760
23/24	Actual	2,591	6,422	9,013	14,396	23,409
24/25	Estimate	2,900	9,200	12,100	16,300	28,400
25/26	Forecast	3,200	9,600	12,800	16,800	29,600
26/27	Forecast	3,600	9,900	13,500	17,400	30,900
27/28	Forecast	3,900	10,300	14,200	18,100	32,300
28/29	Forecast	4,300	10,800	15,100	18,900	34,000
29/30	Forecast	4,700	11,200	15,900	19,600	35,500

Table notes:

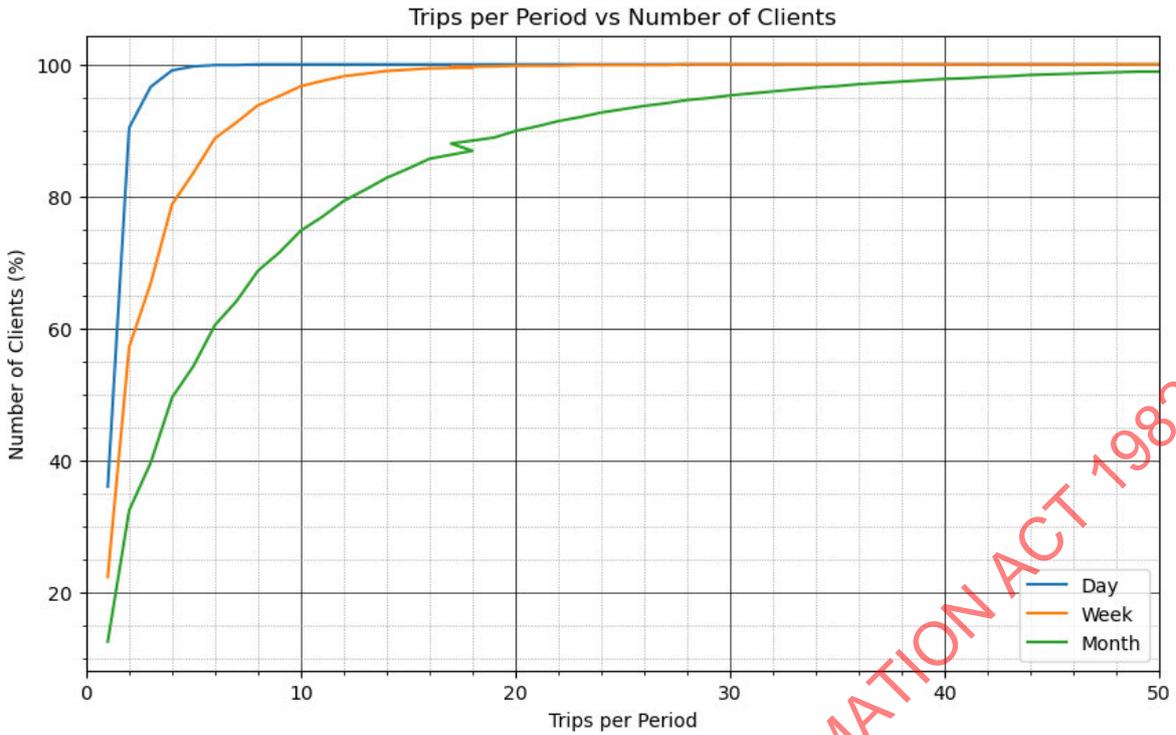
1. Total Mobility Crown discount (half-price), PT = Public transport Community Services Card (CSC) 50% discount, SGC = SuperGold free off-peak travel
2. TM and PT forecasts based on demand and fare level trends.
3. Assume 4% growth in PT demand going forward, with 2024/25 as baseline growth.
4. Assume CSC is 5.7% of PT demand going forward, and SGC is 10% going forward.
5. Assume 2% inflation increase in SGC in line with current multi-year appropriation.

5. **Q:** Please confirm the statement "Since the introduction, the covid response and the making Crown Share the number of Total Mobility boardings have increased from about 1.5 million trips in 2021/22 to 2.7 million in 2024/25. By 2030 the NZTA forecast over 3 million trips will be taken." Is still accurate.

**A:** The statement is mostly correct, but we have since updated our forecasts. As per above, demand was 1.5 million trips in 21/22 and is now forecast to be 2.9 million in 24/25 and up to 4.7 million trips by 2030. This ongoing growth is driven by significant increases in the number of clients entering the scheme compared to historically. There is no data on how long this trend will continue as it is unprecedented.

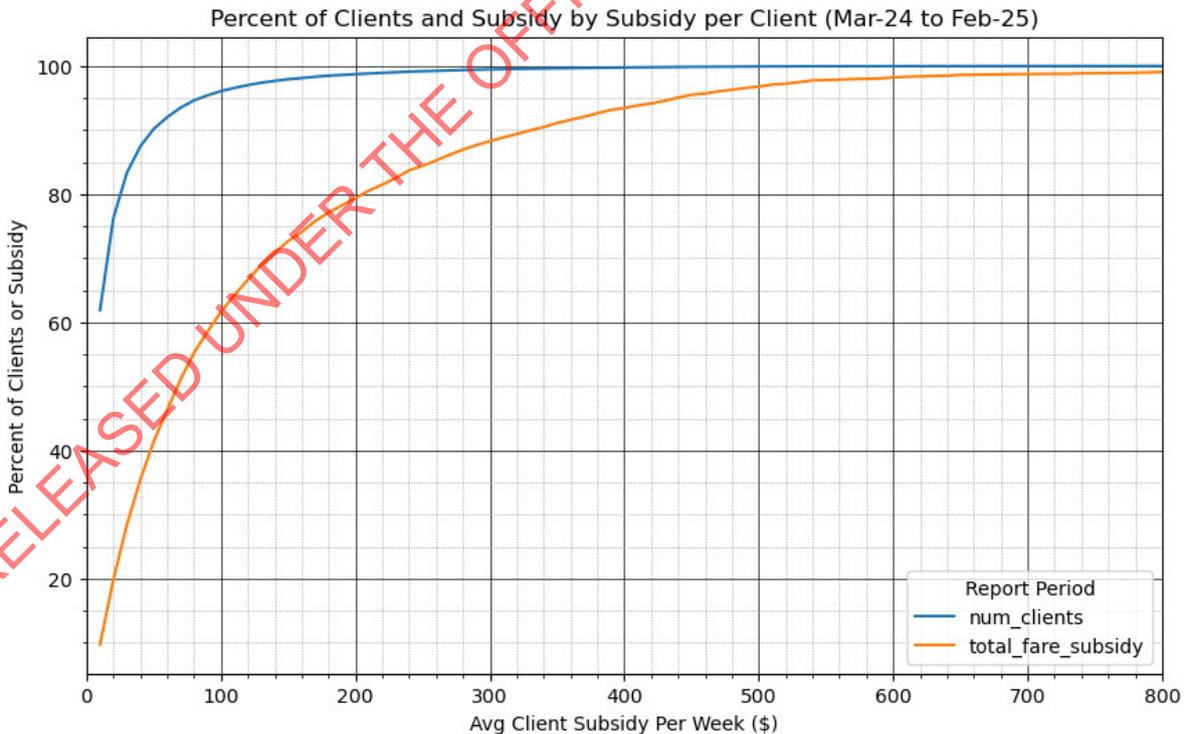
6. **Q:** Please confirm the indicating that while overall demand is increasing individual use is not excessive. For example, most Total Mobility clients take less than 10 trips per month (with about 35% using taking 2 or less trips).

**A:** The following figure, for the period Mar 2024 to Feb 2025, shows that 30% of clients make fewer than 2 trips per month and 80% of clients make 11 or fewer trips per month.



7. **Q:** Please confirm the data about usage that suggests about 50% of the total fare revenue is attributable to the 20% of 'high user' clients who use over 15 trips per month.

**A:** The following figure shows the percentage of clients or subsidy against the average client subsidy per week, for the period Mar 2024 to Feb 2025. This indicates that over 90% of clients receive \$100 or less subsidy per week and that this accounts for just over 60% of the total annual subsidy.



8. **Q:** What is the immediate cost pressure for 2025/26 that is being managed?

**A:** We have updated our estimates. The following assessment shows the 2025/26 growth expectations across both Total Mobility and Community Service Card concessions are potentially 2% higher than for the 2024/25 period. This suggests a potential shortfall of less than \$1m across the appropriation 2025/26.

**Table 4: Community Connect Crown funding, 2024/25 and 2025/26 forecasts**

	2024/25			2025/26	
	Vote Transport	NZTA forecast	Forecast vs 24/25 Vote Transport	NZTA forecast	Forecast vs 24/25 Vote Transport
Public transport	24,335	12,000	-12,335	12,500	-11,835
Total Mobility	12,000	22,000	10,000	24,500	12,500
Admin	208	208	-	208	-
<b>Total</b>	<b>36,543</b>	<b>34,208</b>	<b>-2,335</b>	<b>37,208</b>	<b>665</b>
<b>Percent change</b>			<b>-6.4%</b>		<b>1.8%</b>

Table notes:

1. The admin portion of appropriation has been copied forward and not been forecast.
2. PT CSC demand has increased 43% compared to prior to CC changes (Jul24-Feb25 vs Jul23-Feb24). This is likely due to people moving from other concessions when CC became more targeted.
3. PT overall trips have increase 4.1% over same period (Jul24-Feb25 vs Jul23-Feb24)
4. PT average fare (adult card) has increased 8.6% over same period (Jul24-Feb25 vs Jul23-Feb24)

9. **Q:** Please provide a table that shows PTAs who have reported the highest cost pressure. Does this show what the budgeted for and actual spend?

**A:** The following table shows the latest NZTA forecast vs approved budget for NLTF + local share combined of Total Mobility continuous programme expenditure (exclude Crown funding and NLTF top-up from the previous year). This indicates eight regions with a funding shortfall of greater than 5% with a shortfall nationally of \$14 million, or 36% of current budget (as at 31 March). This shortfall is split 60:40 between NLTF and local share. The most significant funding gaps are Auckland, Canterbury, Wellington, Otago and Bay of Plenty.

NZTA manages funding demand on the NLTP by first working with and providing delegated authority to the PTAs to manage within the funding approved programme, which includes the authority for PTAs to transfer funds between work categories or from future year funding during the 2024-27 period. If the PTA cannot manage funding demand within the approved programme budget, the PTA can request a cost increase from NZTA. An increase of funding is not guaranteed as the request needs to be affordable and a priority for additional investment from the NLTF.

Based on the forecasts below for the current financial year and what this infers for the 2024-27 period, there will be a significant budget shortfall that most PTAs will struggle to manage within their funding approved 2024-27 programmes. It is likely that the PTAs will seek additional funding from the NLTF, the increase in funding needed for the 2024-27 period is unlikely to be affordable to the Public Transport Services activity class investment target that has been approved by the NZTA Board.

**Table 5: Forecast NLTF + local share funding for Total Mobility, 2024/25**

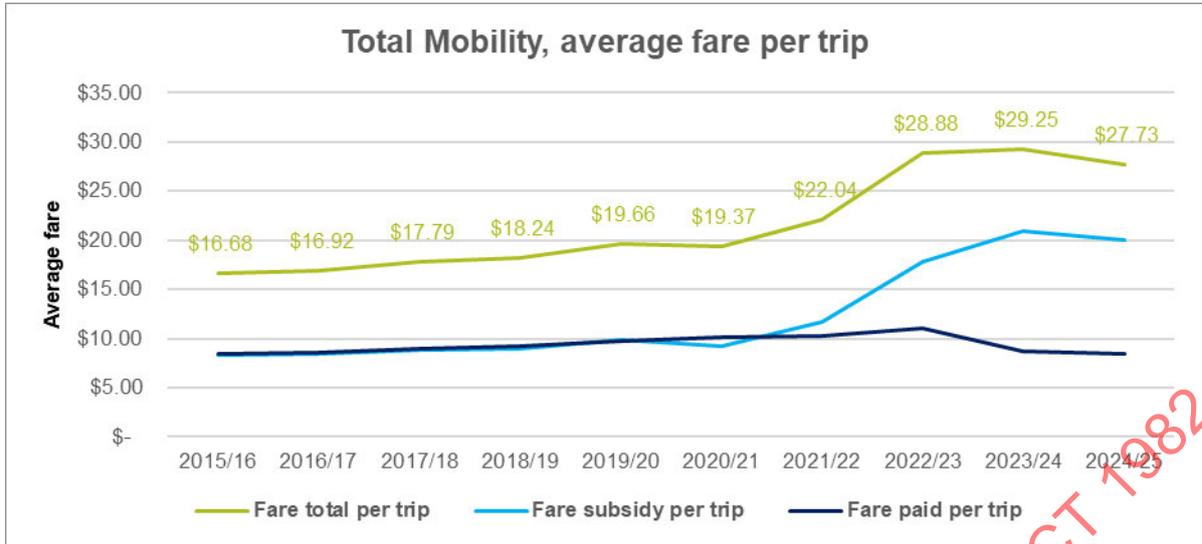
	NLTF + Local share funding (\$000)				
	2024/25				
	Budget as at 31 Mar 2025	NZTA Forecast	Diff #	Diff %	Funding shortfall (where >5%)
Auckland	13,512	19,764	6,252	46.3%	6,252
Canterbury	7,770	11,746	3,976	51.2%	3,976
Wellington	5,032	6,607	1,575	31.3%	1,575
Horizons	1,880	2,199	319	17.0%	319
Hawkes Bay	2,601	2,136	-465	-17.9%	-
Otago	1,431	2,322	891	62.3%	891
Waikato	1,721	1,637	-84	-4.9%	-
Invercargill	963	1,327	364	37.8%	364
Bay of Plenty	1,442	2,156	714	49.5%	714
Taranaki	834	805	-29	-3.5%	-
Nelson-Tasman	786	687	-99	-12.6%	-
Northland	657	673	16	2.4%	-
Marlborough	280	353	73	26.1%	73
West Coast	263	276	13	4.9%	-
Gisborne	204	82	-122	-59.8%	-
<b>Total</b>	<b>39,376</b>	<b>52,770</b>	<b>13,394</b>	<b>34.0%</b>	<b>14,164</b>
<b>Shortfall</b>					<b>36.0%</b>

**10. Q:** The current demand reimbursement model exposes the scheme to cost pressure. Does NZTA have thoughts on specific funding setting changes that could stabilise this or would work better? i.e., what funding mechanisms could change?

**A:** SGC was previously funding based on reimbursement rates as per CC but due to funding pressures such as those being seen in CC transitioned to a bulk funding arrangement. This involved significant negotiations with PTAs at the time.

One option would be to transition the PT CC concession to a similar bulk funding arrangement, potentially combining both CC and SGC into a single Crown fare concessions appropriation for public transport. A multi-year appropriation is strongly recommended as would provide greater certainty and help improve longer-term (beyond single year) financial planning by removing significant funding risks and required assumptions around these. It would be particularly important to align Crown funding with the NLTP funding cycle as NZTA and PTAs must make assumptions as to impact on NLTF and local share funding depending on what Crown funding is or is not available.

Other considerations could include supply side measures such as investigating mechanisms to address the significant increases in taxi fares over the last five years. The following chart shows that the fare subsidy increased significantly from when the subsidy % increased from 50% to 75% in December 2022. Interestingly the fare paid by the client has not changed significantly over that time, or across the last decade.



Source: Monthly PTA reporting.

**11. Q:** *I have assumed that while working in a demand driven model is challenging there are budgetary measure that can be put in place to make sure we don't always spend more than is forecast/budgeted for. Or do you think there is a case for changing the model.*

**A:** There should be further consideration given to the model. Any changes should be developed in consultation with PTAs. The previous engagement process for SGC (some 5-10 years) could be a model for this.

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## Appendix A Detailed tables

### A.1 Total Mobility forecast by year to 2029/30

National		Client travel		Client fares					
Region	Year	Client trips (000)	Period change	Fare paid (\$000)	Fare subsidy (\$000)	Fare total (\$000)	Avg fare paid per trip (\$)	Average subsidy per trip (\$)	Average total fare per trip (\$)
National	18/19	1,825	-	16,815	16,469	33,285	\$ 9.21	\$ 9.02	\$ 18.24
National	19/20	1,683	-7.8%	16,424	16,668	33,092	\$ 9.76	\$ 9.90	\$ 19.66
National	20/21	1,793	6.5%	18,116	16,611	34,727	\$ 10.10	\$ 9.26	\$ 19.37
National	21/22	1,561	-13.0%	14,776	18,329	33,105	\$ 9.47	\$ 11.74	\$ 21.21
National	22/23	2,187	40.1%	16,030	38,878	54,908	\$ 7.33	\$ 17.78	\$ 25.10
National	23/24	2,591	18.5%	20,395	54,308	74,703	\$ 7.87	\$ 20.96	\$ 28.83
National	24/25	2,943	13.6%	23,767	64,616	88,383	\$ 8.08	\$ 21.96	\$ 30.03
National	25/26	3,237	10.0%	26,666	73,950	100,616	\$ 8.24	\$ 22.84	\$ 31.08
National	26/27	3,561	10.0%	29,920	84,631	114,551	\$ 8.40	\$ 23.77	\$ 32.17
National	27/28	3,917	10.0%	33,570	96,855	130,425	\$ 8.57	\$ 24.73	\$ 33.30
National	28/29	4,309	10.0%	37,666	110,845	148,510	\$ 8.74	\$ 25.73	\$ 34.47
National	29/30	4,739	10.0%	42,261	126,855	169,116	\$ 8.92	\$ 26.77	\$ 35.68
National	NLTP 2018-21	5,302	-	51,355	49,748	101,104	\$ 9.69	\$ 9.38	\$ 19.07
National	NLTP 2021-24	6,339	19.6%	51,201	111,515	162,716	\$ 8.08	\$ 17.59	\$ 25.67
National	NLTP 2024-27	9,741	53.7%	80,353	223,197	303,550	\$ 8.25	\$ 22.91	\$ 31.16
National	NLTP 2027-30	12,965	33.1%	113,496	334,555	448,051	\$ 8.75	\$ 25.80	\$ 34.56

National		Forecast expenditure				
Region	Year	Fare paid by client (\$000)	Fare subsidy (\$000)	Fare total (\$000)	Overheads (\$000)	Total expenditure (\$000)
National	18/19	16,815	16,469	33,285	2,142	35,427
National	19/20	16,424	16,668	33,092	4,725	37,817
National	20/21	18,116	16,611	34,727	3,573	38,300
National	21/22	14,776	18,329	33,105	2,037	35,142
National	22/23	16,030	38,878	54,908	450	54,458
National	23/24	20,395	54,308	74,703	3,219	77,923
National	24/25	23,767	64,616	88,383	9,692	98,076
National	25/26	26,666	73,950	100,616	11,092	111,709
National	26/27	29,920	84,631	114,551	12,695	127,245
National	27/28	33,570	96,855	130,425	14,528	144,953
National	28/29	37,666	110,845	148,510	16,627	165,137
National	29/30	42,261	126,855	169,116	19,028	188,144
National	NLTP 2018-21	51,355	49,748	101,104	10,440	111,543
National	NLTP 2021-24	51,201	111,515	162,716	4,806	167,522
National	NLTP 2024-27	80,353	223,197	303,550	33,480	337,030
National	NLTP 2027-30	113,496	334,555	448,051	50,183	498,235

National		Forecast subsidy (WC517)				
Region	Year	Crown	NZTA	Local	NLTF + local	Total subsidy
National	18/19	-	11,159	7,453	18,611	18,611
National	19/20	-	14,094	7,299	21,393	21,393
National	20/21	-	12,374	7,810	20,184	20,184
National	21/22	2,063	10,981	7,321	18,302	20,365
National	22/23	14,984	14,066	9,378	23,444	38,428
National	23/24	18,905	23,173	15,449	38,622	57,527
National	24/25	21,539	31,662	21,108	52,770	74,309
National	25/26	24,650	36,235	24,157	60,392	85,042
National	26/27	28,210	41,469	27,646	69,115	97,326
National	27/28	32,285	47,459	31,639	79,098	111,383
National	28/29	36,948	54,314	36,209	90,523	127,471
National	29/30	42,285	62,159	41,439	103,598	145,883
National	NLTP 2018-21	-	37,626	22,562	60,188	60,188
National	NLTP 2021-24	35,953	48,221	32,147	80,368	116,321
National	NLTP 2024-27	74,399	109,367	72,911	182,278	256,677
National	NLTP 2027-30	111,518	163,932	109,288	273,220	384,738

## A.2 Community Connect and SuperGold appropriation forecasts

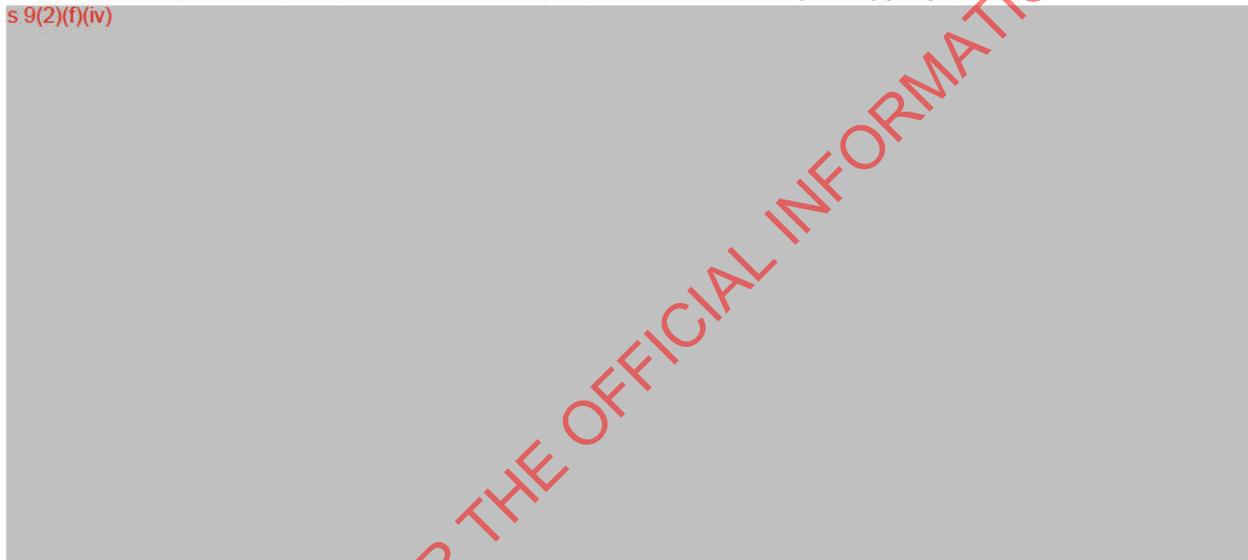
Year		Forecast passenger demand (000)				
		Community Connect scheme			SGC scheme	Crown
		TM	PT (CSC)	CC Total	SGC	Grand Total
21/22	Actual	1,561	-	1,561	9,246	10,807
22/23	Actual	2,187	-	2,187	11,573	13,760
23/24	Actual	2,591	6,422	9,013	14,396	23,409
24/25	Estimate	2,900	9,200	12,100	16,300	28,400
25/26	Forecast	3,200	9,600	12,800	16,800	29,600
26/27	Forecast	3,600	9,900	13,500	17,400	30,900
27/28	Forecast	3,900	10,300	14,200	18,100	32,300
28/29	Forecast	4,300	10,800	15,100	18,900	34,000
29/30	Forecast	4,700	11,200	15,900	19,600	35,500

Assume 4% growth in PT demand and funding going forward, with 2024/25 as baseline growth.

Assume CSC is 5.7% of PT demand going forward, and SGC is 10% going forward.

Assume 2% inflation increase in SGC in line with current multi-year appropriation.

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### A.3 Total Mobility NZTA forecasts by PTA - 2024/25

Region	Client trips (000)	Forecast expenditure				
		Fare paid (\$000)	Fare subsidy (\$000)	Fare total (\$000)	Estimated admin overheads	Total expenditure
Auckland	760	9,400	24,201	33,601	3,630	37,231
Canterbury	538	4,439	14,383	18,822	2,157	20,980
Wellington	436	2,977	8,090	11,067	1,214	12,280
Horizons	269	1,307	2,693	4,000	404	4,404
Hawkes Bay	153	900	2,615	3,515	392	3,908
Otago	140	988	2,843	3,832	427	4,258
Waikato	139	859	2,005	2,864	301	3,165
Invercargill	106	473	1,625	2,099	244	2,343
Bay of Plenty	143	934	2,640	3,573	396	3,969
Taranaki	65	375	986	1,361	148	1,509
Nelson-Tasman	60	329	841	1,170	126	1,297
Northland	48	301	824	1,125	124	1,248
Marlborough	44	157	433	590	65	655
West Coast	23	94	338	432	51	483
Gisborne	19	233	100	333	15	348
<b>Total</b>	<b>2,943</b>	<b>23,767</b>	<b>64,616</b>	<b>88,383</b>	<b>9,692</b>	<b>98,076</b>

Region	Client trips (000)	Forecast subsidy (WC517)			
		Crown (\$000)	NZTA (\$000)	Local (\$000)	Forecast subsidy (\$000)
Auckland	760	8,067	11,858	7,906	27,831
Canterbury	538	4,794	7,048	4,698	16,540
Wellington	436	2,697	3,964	2,643	9,304
Horizons	269	898	1,320	880	3,097
Hawkes Bay	153	872	1,281	854	3,007
Otago	140	948	1,393	929	3,270
Waikato	139	668	982	655	2,305
Invercargill	106	542	796	531	1,869
Bay of Plenty	143	880	1,293	862	3,036
Taranaki	65	329	483	322	1,133
Nelson-Tasman	60	280	412	275	967
Northland	48	275	404	269	948
Marlborough	44	144	212	141	498
West Coast	23	113	166	110	389
Gisborne	19	33	49	33	115
<b>Total</b>	<b>2,943</b>	<b>21,539</b>	<b>31,662</b>	<b>21,108</b>	<b>74,309</b>

Assume that trips grow by 10% p.a.

Assume that overheads are 15% of expenditure

Assume that inflation is 2% p.a.