



# ASSESSMENT OF TRANSPORTATION NEEDS OF ELDERLY AND HANDICAPPED RESIDENTS OF OZAUKEE COUNTY

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MEMORANDUM REPORT NUMBER 8

ASSESSMENT OF TRANSPORTATION NEEDS OF ELDERLY  
AND HANDICAPPED RESIDENTS OF OZAUKEE COUNTY

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## ASSESSMENT OF TRANSPORTATION NEEDS OF ELDERLY AND HANDICAPPED RESIDENTS OF OZAUKEE COUNTY

### INTRODUCTION

On June 11, 1986, the Ozaukee County Commission on Aging requested the assistance of the Southeastern Wisconsin Regional Planning Commission in conducting an assessment of the unmet transportation needs of the resident elderly and handicapped population of Ozaukee County. The purpose of this assessment was to identify the quantity and characteristics of the transportation needs of the elderly and handicapped persons residing in Ozaukee County that are not being satisfied by existing special transportation services provided within Ozaukee County.

This assessment of unmet transportation needs was accomplished by a survey and outreach effort designed to inform the transportation handicapped and elderly population in Ozaukee County that such an assessment was being conducted, and a request that those elderly and transportation handicapped persons who believe they are not being adequately served by existing special transportation services, obtain and complete a survey to quantify the number and characteristics of the trips which they would desire to make, but cannot presently make, with the existing special transportation services. Such information was considered essential to a definition of current transportation problems of the elderly and transportation handicapped in Ozaukee County, and to the formulation and evaluation of strategies to alleviate those problems.

The assessment effort was guided by the Ozaukee County Transportation Coordinating Committee, appointed by the Ozaukee County Board of Supervisors specifically to guide the provision of special transportation services for the elderly and handicapped in Ozaukee County. The membership of the Committee, which is listed in Appendix A of this memorandum, includes representatives of public agencies and private organizations which provide services for the elderly and handicapped in Ozaukee County. The Committee guided the development of the assessment effort, particularly with respect to the design of the survey and the efforts made to inform the elderly and handicapped Ozaukee County population of the survey. The Committee approved this report on June 22, 1987.

This report presents the results of that survey effort conducted in January 1987. Also provided in this report is a brief description of the existing special transportation services in Ozaukee County.

### EXISTING SPECIAL TRANSPORTATION SERVICES

Ozaukee County currently operates a door-to-door transportation service for the elderly and transportation handicapped residents of the County, that is,

all county residents of age 60 and over, and all county residents with a physical or developmental disability. Three vehicles are available for service, including one wheelchair lift-equipped van. About 650 one-way trips per month are currently made by elderly and handicapped persons using the Ozaukee County service. During the course of a year, the county program provides service to about 220 persons.

The transportation service operates daily Monday through Friday from 7:45 a.m. to 5:00 p.m., with 24-hour advance reservations for the service required. Trips for medical, nutritional, and work-related purposes receive highest scheduling priority, as it is not possible at all times to serve all trips requested. This, however, occurs rarely, and is typically handled by rescheduling, rather than refusing, a requested trip. Passenger contributions, or fares, are required on all trips, except those trips made by individuals who are eligible for Title XIX assistance. The costs for trips made by such individuals are covered by Title XIX assistance. The regular fares charged for the service range from \$1 to \$5 per one-way trip according to the distance traveled. Each rider is limited to three round trips--six one-way trips--per week.

The geographic area served includes all of Ozaukee County. No trips are made outside Ozaukee County except for limited purposes including shopping trips to Northridge Shopping Center in Milwaukee County; work-related trips within five miles of Ozaukee County; and medical trips within 10 miles of Ozaukee County to institutions and physicians where similar services do not exist within Ozaukee County. Trips are not made outside a person's home community for grocery shopping or personal business which may be available in that community.

The fares currently charged for the existing specialized transportation services do not cover the full cost of providing the service for each trip. The fee charged for the special transportation service offered by the Ozaukee County Office of Aging Services covers only about 20 percent of the total cost of providing the service. Consequently, fees at least equal to those described above would probably be charged for any new services added to address any identified unmet transportation needs.

Similar special transportation services are also provided by the Cities of Port Washington and Cedarburg, each serving only the residents of each City. The Port Washington Senior Center van operates Monday, Wednesday, and Friday from 10:00 a.m. to 4:00 p.m. Trips can be made by city residents to any location within the City; however, the van does not go outside the city limits. There is a cost of \$0.50 per one-way trip. About 410 one-way trips per month are made on the City's van service for the elderly. The list of users for Port Washington's van service includes about 50 persons. The Cedarburg Senior Center van is wheelchair lift-equipped and serves City of Cedarburg residents for travel within the City, and up to 20 miles outside the city limits. Operations run Monday through Friday from 8:00 a.m. to 4:30 p.m. at a cost of \$0.50 per one-way trip for local trips and \$1.50 to \$3 for one-way trips outside the City. The city van service currently provides about 180 trips per month to elderly and handicapped city residents. About 75 persons are regular users of the Cedarburg van service. The Ozaukee County specialized transportation service is available to residents of the communities of Port Washington and Cedarburg, but only if the specialized services provided by these communities cannot serve their trip due to capacity or other limitations.



Additional transportation services based outside Ozaukee County provide transportation to all or part of Ozaukee County. Care Cabs, Inc., based in Milwaukee, serves the area as far north as Port Washington; Medical Transports of Wisconsin, Inc., also based in Milwaukee, operates throughout Ozaukee County; and Courtesy Van, based in Fond du Lac, serves the entire State. Other transportation services exist, but serve only their clients or population; for example, the Lasata Nursing Home transit service serves only nursing home residents; Portal Industries and The Threshold serve only their own clients; and the American Red Cross serves primarily medical trips made by cancer patients.

#### DESCRIPTION OF TRANSPORTATION NEEDS ASSESSMENT PROCEDURE

The first step in the assessment of the unmet transportation needs of the elderly and transportation handicapped residents of Ozaukee County was to undertake an extensive effort to notify Ozaukee County elderly and transportation handicapped residents that such an assessment was being made, and that elderly and handicapped residents with transportation needs not being met by existing special transportation services should obtain a survey form from the County Office of Aging Services and complete and return the survey to inform the Office of Aging Services of their unmet transportation needs.

The elderly and handicapped population of Ozaukee County were notified of the assessment effort in two ways. The primary method of notification was by mailing a letter informing them of the survey effort and including with the letter a copy of the survey to be filled out and returned, using a self addressed, postage paid, mailback envelope. A copy of the letter and survey form are provided in Appendix B to this memorandum. All households with household members on available newsletter mailing lists of organizations serving the elderly and transportation handicapped population identified by the Ozaukee County Transportation Coordinating Committee were mailed this letter, survey form, and return envelope. These mailing lists were obtained from the Ozaukee County Office of Aging Services; the Community Learning Center; Ozaukee Disabled Citizens, Inc.; Portal Industries, Inc.; and the Port Washington Senior Citizens Center. Through this direct mailing, a large segment the elderly and handicapped population of Ozaukee County was directly contacted, informed of the unmet transportation needs assessment being undertaken by the County, and given the opportunity to identify their unmet transportation needs. A total of 4,756 survey packages was mailed to households with elderly and handicapped residents of Ozaukee County, representing about 20 percent of the total households in Ozaukee County. Approximately 95 percent of the mailed survey packages were sent to households with elderly household members--both handicapped and nonhandicapped--and approximately 5 percent of the mailed survey packages were sent to households with nonelderly handicapped household members.

The second method of notifying county elderly and handicapped residents of the survey effort and distributing surveys was to inform all county elderly and handicapped of the assessment effort through an extensive outreach effort which asked that elderly and handicapped residents with unmet transportation needs contact the Office of Aging Services and request that a survey form be mailed to them. The efforts made to inform Ozaukee County elderly and handicapped residents included articles in local newspapers and announcements on

local radio programs; notices posted at senior citizen centers, nutrition sites, meeting places of senior citizen clubs, special housing complexes for elderly and handicapped persons, public and private social service agencies serving handicapped persons, and local churches; and announcements placed in newsletters reaching elderly and handicapped Ozaukee County residents. Also, a Regional Planning Commission staff member was present at five of the eight senior citizen nutrition sites in the County for at least one meal to announce and describe the survey effort, distribute the survey, and answer questions. The published newspaper and newsletter articles and special announcements of the assessment effort directed elderly and handicapped Ozaukee County residents who had not been sent a survey package, but who wished to participate in the survey, to contact the Ozaukee County Office of Aging Services. Upon such contact, a very brief explanation of the survey purpose would be made; and the names and addresses of the respondent obtained. A survey package would then be mailed to the respondent. A total of 32 surveys was requested and distributed.

#### FINDINGS OF THE UNMET TRANSPORTATION NEEDS ASSESSMENT

Of the 4,788 surveys distributed directly through the mail or through the Office of Aging Services in response to a request, only 163 surveys were returned by county residents expressing an unmet transportation need. Therefore, it may be concluded that the transportation needs of nearly the entire elderly and handicapped population of Ozaukee County are adequately met by the existing special transportation services, their own personal transportation, or other transportation services. As noted earlier, the survey was designed to be completed and returned only by those elderly and handicapped residents with unmet transportation needs. Residents whose transportation needs were adequately met were not to complete and return the survey form. In completing the survey, each respondent described a trip he or she would like to make, but currently does not make using the specialized transportation services in the County.

Of the total 163 survey respondents, 111 generally desired expansion of the current specialized transit services to meet their transportation needs, which include travel outside Ozaukee County, on weekends, during early morning or evening hours, and/or more than three times per week. However, only 18 of these 111 survey respondents indicated that the lack of such service prevented them from making necessary travel. It may also be noted that 34 of these 111 survey respondents currently use the existing specialized transit services in the County. Thus, the survey identified a potential 77 "new" users of expanded service, which may be compared to the existing approximately 350 regular users of the current specialized transit services.

The survey responses are considered to represent a reasonable estimate of the current number of elderly and handicapped individuals in Ozaukee County having unmet transportation needs, and of the number of potential new users of possibly expanded service, even though mailback surveys typically are completed and returned by only about 30 percent of those receiving the survey. The survey which was conducted was not typical in a number of respects. Survey respondents had much to gain from completing and returning a survey, namely, notifying Ozaukee County officials of their needs not being met by present transportation services and potentially influencing the development of service modifications to meet those needs. Also, efforts were made to contact each

elderly and handicapped individual in the County and provide these individuals with a survey form. Efforts were also made to announce the survey effort to the entire county population so that friends or relatives of elderly and handicapped individuals could encourage them to return a survey, or assist them in completing and returning a survey.

Some members of the Ozaukee County Transportation Coordinating Committee, however, indicated that they believed the survey may have underestimated unmet transportation needs as, in their opinion, some of the more aged and isolated elderly county residents, and possibly some developmentally disabled residents, would not have completed the survey even though they had unmet needs. It should be noted that, while completing the survey would require some effort by individuals or their friends or relatives, a much more substantial effort is required to use the special transportation services. It could be postulated that those not completing the survey also would probably not use expanded services if available.

The remainder of this section of this memorandum describes the findings of the survey. It should be noted that, of the 163 surveys returned, approximately 135 were completely filled out. The responses from all 163 surveys, however, have been included in the following presentation of survey results, where possible. Also, it should be noted that some survey respondents provided multiple responses to selected survey questions; for example, some survey respondents indicated that the trip that they would desire to make would have multiple purposes, such as shopping and medical, and may, accordingly, have multiple destinations within and outside their home community. Also, the trip, because of its multiple purposes and destinations, may extend over the morning and afternoon.

The presentation of survey results begins with the description of the characteristics of those indicating unmet transportation needs, including age, disability, and home community in Ozaukee County. Next, information is provided on the specific unmet transportation needs identified by those responding to the survey. The need for special transportation service provided outside the limits of the existing services with respect to days of operation of service, hours of operation, service area, and frequency of use is discussed--that is, the need for transportation on weekends or in the early morning and evening, outside Ozaukee County, or more than three times per week is discussed. The number of survey respondents indicating that they are unable to travel as a result of those survey limits is specifically identified. Information is also provided on the needs identified with respect to expansion of service necessary within the limits of the services currently provided, that is, expansion of service within Ozaukee County which would be necessary on weekdays between normal service hours of 8:00 a.m. and 5:00 p.m. to meet the identified transportation needs. Again, those unmet transportation needs which result in trips not being made are specifically identified.

#### Characteristics of Survey Respondents

Of the 163 survey respondents indicating unmet transportation needs, a total of 140, or 86 percent, were elderly, that is, over the age of 60. Four of the 140 elderly respondents, or 3 percent, were residents of nursing homes. Of the 140 elderly respondents, 89, or 64 percent, indicated that they had a disability which affected their mobility, and the remaining 51, or 36 percent, indicated that they had no disability which affected their mobility. The

remaining 23 of the 163 respondents were under the age of 60 and had a disability which limited their mobility. None of the 23 respondents were residents of nursing homes or group homes. The disabilities identified by the survey respondents are summarized in Table 1.

It would appear that a higher percentage of those Ozaukee County residents under the age of 60 and having a disability have unmet transportation needs, as compared to the total Ozaukee County elderly population. Twenty-three county residents with a disability under the age of 60 returned the survey and indicated an unmet need, representing about 10 percent of the approximately 250 such county residents who received the survey. One hundred and forty elderly county residents returned the survey and indicated an unmet need, representing only about 3 percent of the over 4,500 elderly residents who received the survey.

The home community of the 163 Ozaukee County respondents indicating unmet transportation needs in the survey is summarized in Table 2. Also shown in Table 2 is the total elderly population in each municipality in 1980.

Transportation Needs Due To Limitations of  
Existing Service With Respect to Service Area,  
Days and Hours of Operation and Frequency of Use

The existing special transportation service provided by Ozaukee County basically operates only within Ozaukee County on weekdays between the hours of 8:00 a.m. and 5:00 p.m. Users of the service are limited to three round or six one-way trips per week. The services provided by the communities of Port Washington and Cedarburg have basically the same restrictions. However, the City of Port Washington service only operates on Mondays, Wednesdays, and Fridays, and only provides service within the City. The City of Cedarburg service will carry passengers up to 20 miles outside the city limits. Neither the City of Port Washington nor City of Cedarburg service restricts users to a number of trips per week.

Of the 163 Ozaukee County residents responding to the survey and indicating an unmet transportation need, 111, or 68 percent, indicated that they had a need for special transportation service outside the present basic limits of the specialized services provided within Ozaukee County. These 111 survey respondents included 20 nonelderly handicapped respondents and 91 elderly respondents, of whom 52, or 57 percent, reported having a handicap which limited their mobility. Of the 111 respondents, 23 were residents of the City of Port Washington and thus were principally served by the City of Port Washington specialized transit service; 16 were residents of the City of Cedarburg and were principally served by the City of Cedarburg specialized service; and 72 were residents of other communities within Ozaukee County and were served by the Ozaukee County specialized service. In addition, 34 of these 111 respondents were found to be current users of the existing specialized transportation services within the County.

The principal need for additional special transportation service cited by survey respondents was for service to be provided outside the County, with 89, or 55 percent, of the 163 survey respondents indicating a need to travel outside Ozaukee County, as shown in Table 3. Of the 89 respondents, 18 were residents of the City of Port Washington, 12 were residents of the City of

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Table 1

CHARACTERISTICS OF OZAUKEE COUNTY RESIDENTS  
RESPONDING TO UNMET TRANSPORTATION NEEDS SURVEY: 1987

	Elderly (Age 60 and over)	Nonelderly (Age 59 and under)
Not Disabled.....	51	--
Disabled		
Confined to Home.....	17	4
Require Wheelchair.....	11	13
Require Walker, Crutches, or Cane....	31	2
Have Difficulty Walking.....	21	3
Vision.....	9	1
Subtotal	89	23
Total	140	23

Source: SEWRPC.

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Table 2

HOME COMMUNITY OF OZAUKEE COUNTY RESIDENTS  
RESPONDING TO UNMET NEEDS TRANSPORTATION SURVEY  
COMPARED TO TOTAL 1980 ELDERLY POPULATION

Municipality	Surveys Returned		1980 Elderly Population (60 years of age and over)	
	Total	Percent of Total Surveys Returned	Total	Percent of Total County Elderly Population
Village of Bayside.....	--	--	15	0.2
Village of Belgium.....	5	3.1	118	1.4
Town of Belgium.....	3	1.8	251	3.1
City of Cedarburg.....	23	14.1	1,455	17.6
Town of Cedarburg.....	11	6.7	433	5.2
Village of Fredonia.....	4	2.5	134	1.6
Town of Fredonia.....	4	2.5	229	2.8
Village of Grafton.....	17	10.4	791	9.6
Town of Grafton.....	1	0.6	341	4.1
City of Mequon.....	31	19.0	1,895	23.0
Village of Newburg.....	--	--	13	0.2
Village of Thiensville.....	6	3.7	726	8.8
City of Port Washington....	33	20.2	1,287	15.6
Town of Port Washington....	7	4.3	172	2.1
Village of Saukville.....	8	4.9	190	2.3
Town of Saukville.....	1	0.6	201	2.4
No Response.....	9	5.5	--	--
Total	163	100.0	8,251	100.0

Source: U. S. Bureau of the Census and SEWRPC.

Table 3

SUMMARY OF NEEDS FOR SPECIAL TRANSPORTATION  
SERVICE EXPANSION BEYOND EXISTING SERVICE LIMITS

	Elderly Respondents Indicating Need		Nonelderly Respondents Indicating Need		Total	
	Number	Percent of Total 140 Elderly Respondents	Number	Percent of Total 23 Nonelderly Respondents	Number	Percent of Total 163 Respondents
Need for Service to Extend Outside Ozaukee County....	76	54	13	57	89	55
Need for Weekend Service.....	24	17	5	22	29	18
Need for Early Service or Evening Service.....	9	6	7	30	16	10
Need to Make More Than Three Trips per Week on Service.....	2	1	1	4	3	2
Total Respondents Indicating A Need for Extended Service <sup>a</sup> .....	91	65	20	87	111	68

<sup>a</sup>Individual respondents noting more than one need for expanded service are only counted once. Of the 111 respondents, 23 were City of Port Washington residents, 16 were City of Cedarburg residents, and 72 were residents of other Ozaukee County communities.

Source: SEWRPC.

Cedarburg, and 59 were residents of other communities within Ozaukee County. Sixty-seven respondents specifically indicated a need to travel to Milwaukee County; 12 for travel to Washington County; three for travel to Sheboygan County; two for travel to Waukesha County; and one for travel to Dane County. Of the 89 survey respondents indicating a need to travel outside Ozaukee County, 76 were elderly, representing 54 percent of the total 140 elderly survey respondents; and 13 were nonelderly, representing 57 percent of the 23 total nonelderly respondents.

Another reason for special transportation service to be provided beyond the scope of the existing special transportation services was the need to travel on weekends, which was cited by 29, or 18 percent of the 163 survey respondents. Eight survey respondents indicated a need to travel on Saturday; 12 indicated a need to travel on Sunday; and nine indicated a need to travel on both days of the weekend. Of the 29 survey respondents indicating a need to travel on weekends, 24 were elderly, representing 17 percent of the total elderly survey respondents; and five were nonelderly, representing 22 percent of the total nonelderly respondents. Also, of the 29 survey respondents indicating a need to travel on weekends, eight were residents of the City of Port Washington, six were residents of the City of Cedarburg, and 15 were residents of other Ozaukee County communities.

The need to travel prior to 8:00 a.m. or after 5:00 p.m. was cited by 16, or 10 percent, of the survey respondents. Three cited a need to travel prior to 8:00 a.m.; 11 cited a need to travel after 5:00 p.m.; and two indicated a need to travel both before 8:00 a.m. and after 5:00 p.m. Of the 16 survey respondents noting a need to travel other than between 8:00 a.m. and 5:00 p.m., nine were elderly, representing 6 percent of the total 140 elderly respondents; and seven were nonelderly, representing 30 percent of the total 23 nonelderly respondents. Two of the 16 survey respondents noting a need to travel other than between 8:00 a.m. and 5:00 p.m. were residents of the City of Port Washington, two were residents of the City of Cedarburg, and 12 were residents of other Ozaukee County communities.

With respect to the limitations on frequency of use of three round trips or six one-way trips per week--which applies only to the specialized transit service provided by Ozaukee County--three survey respondents identified a need to use the service approximately every weekday, or five times per week--all from communities in Ozaukee County other than the Cities of Cedarburg and Port Washington. Two of the three respondents indicated a need for the service each weekday to travel to and from work, and the other indicated a need to travel each weekday for personal business reasons or, more specifically, to adult day care. Two of the three survey respondents indicating a need to travel more than three times per week were elderly, representing 1 percent of the total 140 elderly respondents; and one was nonelderly, representing 4 percent of the total 23 nonelderly respondents.

The purpose of trips which would be made outside the limits of the existing Ozaukee County special transportation services was principally medical, with 66, or 59 percent, of the 111 respondents who noted a need for expanded service, indicating that the trip would be made for a medical purpose. It may be noted that 25 of the 66 respondents, or 38 percent, indicated that the medical trip would be combined with trips for other purposes as well. As indicated in Table 4, the purpose of the trips of the other survey respondents was varied,



Table 4

TRIP PURPOSE OF 111 RESIDENTS INDICATING A NEED FOR EXPANSION  
OF SPECIAL TRANSPORTATION SERVICES IN OZAUKEE COUNTY: 1987

Trip Purpose	Elderly		Nonelderly		Total	
	Number <sup>b</sup>	Percent of 91 Total Elderly Respondents With Need for Expanded Service	Number	Percent of 20 Total Nonelderly Respondents With Need for Expanded Service	Number <sup>b</sup>	Percent of 111 Total Respondents With Need for Expanded Service
Medical <sup>a</sup> .....	58	64	8	40	66	60
Personal Business.....	5	5	3	15	8	7
Shopping.....	5	5	2	10	7	6
Church.....	7	8	--	--	7	6
Social/Recreational.....	4	5	2	10	6	5
Work.....	1	1	2	10	3	3
School.....	1	1	1	5	2	2
Combination of Nonmedical Purposes..	9	10	2	10	11	10
Total	91	100	20	100	111	100

<sup>a</sup>Twenty-five respondents--including 24 elderly respondents and one nonelderly respondent--citing a medical trip purpose indicated that the trip would be combined with trips for other purposes.

<sup>b</sup>One respondent did not indicate a trip purpose.

Source: SEWRPC.

with eight, or 7 percent, indicating personal business; seven, or 6 percent, indicating shopping; seven, or 6 percent, indicating church; six, or 5 percent, for social/recreational; three, or 3 percent, for work; two, or 2 percent, for school; and 11, or 10 percent, indicating the trip involved a combination of nonmedical trip purposes.

Survey respondents were also requested to indicate the frequency of trips which they need to make, but which cannot be made due to the limited service area, days and hours of operation and frequency of use of the existing special transportation services in Ozaukee County. Table 5 summarizes the number of times per month that survey respondents reported the need to make a trip which would be outside the limits of the current special transportation services in Ozaukee County, that is, with a destination outside Ozaukee County, on a weekend, other than between 8:00 a.m. and 5:00 p.m., or more than three times per week. The majority of the respondents--62, or about 56 percent, of the 111--indicated that such trips would only be made once or twice a month.

The 111 survey respondents who indicated that they needed to travel outside the limits of the current special transportation services in Ozaukee County were requested in the survey to indicate whether this resulted in a trip not being made, or whether they were now making the trip with their own automobile, the automobile of a friend or relative, or by some other means. Only 18, or 16 percent, of the 111 survey respondents indicated that the limits of the present special transportation services being provided prevented them from making the trip, including 10 elderly and eight nonelderly respondents. Eighty-five of the 111 survey respondents, or 77 percent, including 73 elderly and 12 nonelderly respondents, indicated that they made the trip now, with 24 indicating that they use their own automobile for travel, 60 indicating that they relied on the automobile of a friend or relative, and one indicating both. Eight of these 111 survey respondents, or 7 percent, did not indicate whether or not they made the trip. It may be noted that, for those 18 survey respondents who were unable to travel as a result of the limits of the current special transportation services in Ozaukee County, their trip purpose and frequency was similar to those respondents who were able to make their trip; that is, their principal trip purpose was medical (six, or 33 percent) and trip frequency was once or twice per month (10, or 56 percent). Furthermore, of the 18 not able to travel because of the limits of the current special transportation service, 13, or 72 percent, were unable to travel due to the service area limitation; five, or 28 percent, were unable to travel due to the week-day-only operation; five, or 28 percent, were unable to travel due to the 8:00 a.m. to 5:00 p.m. operation; and one, or 6 percent, was unable to travel due to the frequency of use limitation.

The 111 survey respondents were also informed in the survey that the fees paid by users for each one-way trip on the existing specialized transportation services in Ozaukee County currently range from \$0.50 for local trips to \$5 for long trips. They were asked if they would be able to pay this current fee. Of the 111 respondents, 89, or about 80 percent, indicated that they would be able to pay this fee; 11, or 10 percent, indicated that they would not be able to pay the fee for the transportation service; and 11, or 10 percent of the respondents, did not answer this question.

Table 5

TRIP FREQUENCY OF 111<sup>a</sup> RESPONDENTS INDICATING A NEED FOR  
EXPANSION OF SPECIAL TRANSPORTATION SERVICES IN OZAUKEE COUNTY: 1987

Number of Trips per Month	Elderly		Nonelderly		Total	
	Number	Percent of 91 Total Elderly Respondents With Need for Expanded Service	Number	Percent of 20 Total Nonelderly Respondents With Need for Expanded Service	Number	Percent of 111 Total Respondents With Need for Expanded Service
1 or Fewer	37	41	5	25	42	38
2	15	16	5	25	20	18
3	2	2	1	5	3	3
4	13	14	4	20	17	15
5-12	8	9	2	10	10	9
13 or More	2	2	1	5	3	3
Total <sup>a</sup>	91	100	20	100	111	100

<sup>a</sup>Sixteen of the 111 respondents--including 14 elderly respondents and two nonelderly respondents--did not indicate a trip frequency.

Source: SERWPC.

#### Other Transportation Needs

Another 52 Ozaukee County residents completed and returned the survey. However, it would not be reasonable to consider that all 52 of these county residents had transportation needs which are not met by the present special transportation services. Three of the 52 survey respondents did not fully complete their survey as they did not describe the trip that they would like to make on the special transportation services. The trips described by 49 of the 52 residents that they would like to make on the special transportation services could all be made on the existing services; that is, the trips described by these 49 county residents would be made entirely within Ozaukee County; would be made on weekdays; would be between the hours of 8:00 a.m. and 5:00 p.m.; and would be made three or fewer times per week. Furthermore, eight of these 52 county residents indicated that they by choice do not use the special transportation services because they have their own automobile or the automobile of a friend or relative is available for travel. They further noted that they completed and returned the survey because they envisioned the potential need for the service some time in the future, or that they appreciated that the service is available should they ever need it. Also, another 11 of these 52 residents noted that, until the survey, they were unaware that the existing services could meet their needs. Sixteen of the 52 respondents were found to be current users of the existing specialized transportation services within the County.

The responses by some of the 52 residents did indicate a need for some review and possible modification of the existing transportation services. One response from a City of Port Washington resident indicated that the present services did not permit full choice of destination for certain trips such as shopping. Two respondents--both residents of the City of Cedarburg--indicated that the present service did not meet their needs because they had difficulties entering and exiting the vehicles which provide the service. Three indicated that the present service did not meet their needs because the service required at times rescheduling of their shopping or personal business travel, and the service was at times late in serving them. All three of these survey respondents were residents of communities in Ozaukee County other than the Cities of Cedarburg and Port Washington, and thus were eligible only for the special transportation service provided by Ozaukee County. One survey respondent--a resident of the City of Port Washington--indicated that medical assistance was required during travel and the present services did not provide such medical assistance.

The purpose of the trips which these 52 survey respondents indicated they would like to make on the special transportation services provided in Ozaukee County was principally medical, with 31, or 60 percent, of the 52 respondents indicating that the trip would be made for a medical purpose. It may be noted that 14 of the 31 respondents, or 45 percent, indicated that the medical trip would be combined with trips for other purposes as well. The purpose of the trips of the other survey respondents was varied, with six, or 12 percent, indicating shopping; three, or 6 percent, indicating personal business; three, or 6 percent, indicating social/ recreational; one, or 2 percent, indicating school; and four, or 8 percent, indicating the trip involved a combination of nonmedical purposes. The survey respondents were also requested to indicate the frequency of trips which they would need to make on the existing special transportation services in the County. The majority of the respondents--31, or about 60 percent, of the 52--indicated that the trips would only be made

once or twice a month; eight, or about 15 percent, would make trips four times per month; and five, or 10 percent, would make trips five to 12 times per month.

The 52 survey respondents who indicated an unmet transportation need, although their necessary travel was capable of being served by the existing services, were requested in the survey to indicate whether this trip was not being made at the present time, or whether they were now making this trip with their own automobile, the automobile of a friend or relative, or by some other means. Only eight, or 15 percent, of these 52 survey respondents indicated that they presently are not making the trip by some other means. Of these eight survey respondents, two were residents of the City of Port Washington and were eligible to use the City's special transportation service; two were residents of the City of Cedarburg and were eligible to use the City's special transportation service; and the remaining four were residents of other Ozaukee County communities and were eligible to use the County's special transportation service. Thirty-nine of the 52 respondents, or 75 percent, indicated that they made the trip now, with 14 indicating that they use their own automobiles for travel and 27 indicating that they relied on the automobile of a friend or relative, and one indicating that he/she uses a handicab for travel. Five respondents did not respond to the question. It may be noted that, for those eight survey respondents who noted that they were unable to travel on the existing special transportation services in Ozaukee County, their trip purpose and frequency were similar to those respondents' who were able to make their trip; that is, their principal trip purpose was medical--five, or 63 percent--and trip frequency was once or twice per month--six, or 75 percent. Furthermore, of the eight indicating that they were not able to travel because they did not use the existing special transportation services in Ozaukee County, two indicated that they did not use the services because they were not aware of them; two indicated that they did not use the services because they have encountered difficulties in scheduling trips; one indicated that he/she did not have full choice of destinations for shopping trips; one indicated that he/she had difficulties using the vehicle; and one indicated that he/she needed medical assistance on the trip.

#### SUMMARY AND CONCLUSIONS

On June 11, 1986, the Ozaukee County Commission on Aging requested the assistance of the Southeastern Wisconsin Regional Planning Commission in conducting an assessment of unmet transportation needs of the elderly and handicapped population in Ozaukee County. The purpose of this assessment was to identify the quantity and characteristics of the transportation needs of the elderly and handicapped persons residing in Ozaukee County that are not being met by existing special transportation services provided within Ozaukee County.

The assessment effort was guided by the Ozaukee County Transportation Coordinating Committee, which was appointed by the Ozaukee County Board of Supervisors to guide the provision of special transportation services for the elderly and handicapped population of Ozaukee County. Membership of the Committee includes representatives of public agencies and private organizations which provide services for the elderly and handicapped in Ozaukee County. The Committee guided the development of the assessment effort, particularly with respect to the design of the survey and efforts made to inform the elderly and handicapped Ozaukee County population of the survey.

Ozaukee County currently operates a door-to-door transportation service for the elderly and transportation handicapped residents of the County which provides service to about 220 such persons during the course of a year. The service operates daily Monday through Friday from 8:00 a.m. to 5:00 p.m., with 24-hour advance reservation required. Trips for medical, nutritional, and work-related purposes receive highest scheduling priority. No trips are made outside Ozaukee County except for limited purposes. Fares charged range from \$1 to \$5 per one-way trip, according to the distance traveled; and cover about 20 percent of the total cost of providing the service. Each rider is limited to three trips per week. Similar services, with similar restrictions, are provided by the Cities of Port Washington and Cedarburg within their city limits. The services provided by these communities provide transportation to about 50 persons and 75 persons, respectively.

The first step in the assessment of the unmet transportation needs of the elderly and handicapped residents of Ozaukee County was to undertake extensive efforts to notify Ozaukee County elderly and handicapped residents that such an assessment was being made. The elderly and handicapped population of Ozaukee County were notified of the assessment effort in two ways. The primary method of notifying was by mailing them a letter informing them of the survey effort and including with the letter a copy of the survey to be filled out and returned, using a self-addressed, postage paid, mailback envelope. All households with household members on available newsletter mailing lists of organizations serving the elderly and transportation handicapped population identified by the Ozaukee County Transportation Coordinating Committee were mailed the letter, survey form, and return envelope. A total of 4,756 survey packets was mailed to households with elderly and handicapped residents of Ozaukee County, representing about 20 percent of the total households in the County. The second method used in notifying Ozaukee County elderly and handicapped residents was to inform them through an extensive outreach effort--including articles in local newspapers and announcements on local radio programs; notices posted at senior centers, nutrition sites, meeting places of senior citizen clubs, special housing complexes for elderly and handicapped persons; public and private social service agencies serving handicapped persons; local churches; and newsletters. A total of 32 surveys were requested and distributed.

Of the 4,788 total surveys distributed through the mail or through the Office of Aging Services in response to a request, only 163 surveys were returned by county residents having unmet transportation needs. Therefore, it may be concluded that transportation needs of nearly the entire elderly and handicapped population of Ozaukee County are adequately met by existing special transportation services, their own personal transportation, or other transportation services. As noted earlier, the survey was designed to be completed and returned only by those elderly and handicapped residents with unmet transportation needs.

Of the total 163 survey respondents, 111 generally desired expansion of the current specialized transit services to meet their transportation needs, which include travel outside Ozaukee County, on weekends, during early morning or evening hours, and/or more than three times per week. However, only 18 of these 111 survey respondents indicated that the lack of such service prevented them from making necessary travel. It may also be noted that 34 of these 111 survey respondents currently use the existing specialized transit services in

the County. Thus, the survey identified a potential 77 "new" users of expanded service, which may be compared to the existing approximately 350 regular users of the current specialized transit services.

Of the 163 survey responses indicating unmet transportation needs, a total of 140, or 86 percent, were elderly, that is over the age of 60. Of the 140 elderly respondents, 89, or 64 percent, indicated they had a disability which affected their mobility. The remaining 23 of the 163 respondents were under the age of 60 and had a disability which limited their mobility. Only four of the survey respondents, or 3 percent, were residents of nursing homes.

Each survey respondent was asked to identify the trip which he/she would like to make but which is unable to be made as a result of the limits of present special transportation services. Of the 163 Ozaukee County residents responding to this survey and indicating an unmet transportation need, 111, or 68 percent, indicated that they had a need for special transportation service outside the present limits of the services, that is, they had a need for service on weekends or before 8:00 a.m. or after 5:00 p.m., a need to travel outside Ozaukee County, or a need to travel more than three times per week. These 111 survey respondents included 20 nonelderly handicapped residents and 91 elderly respondents. Of the 111 respondents, 23 were residents of the City of Port Washington and thus were principally served by the City of Port Washington's special transportation service; 16 were residents of the City of Cedarburg and were principally served by the City of Cedarburg's specialized service; and 72 were residents of other communities within Ozaukee County and were served by the Ozaukee County specialized transportation service. It was found that 34 of these 111 persons, or 31 percent, were current users of the existing specialized transportation services within the County.

The principal need for additional special transportation service cited by survey respondents was for service to be provided outside the County, with 89, or 55 percent, of the 163 survey respondents indicating a need to travel outside Ozaukee County. Twenty-nine, or 18 percent, of the 163 survey respondents indicated a need to travel on weekends. Sixteen, or about 10 percent, of the survey respondents, indicated the need to travel prior to 8:00 a.m. or after 5:00 p.m. With respect to limitations placed on frequency of use of three trips per week, three survey respondents identified a need to use the service approximately every weekday, or five times per week.

The purpose of the trips which would be made outside the limits of the existing Ozaukee County special transportation service was principally medical, with 66, or 59 percent, of the 111 respondents who noted the need for expanded service indicating that the trip would be made for a medical purpose. The frequency of trips which would be made outside limits of the existing special transportation services in Ozaukee County would be only about once or twice per month, as the majority of the respondents--62 of the 111--indicated that such trips would be made only once or twice a month.

Of the 111 survey respondents who indicated that they needed to travel outside the limits of the current special transportation services in Ozaukee County, only 18, or 16 percent, of the 111 survey respondents indicated that the limits of the present special transportation service being provided prevented them from making the trip. Eighty-five of the 111 respondents indicated that

they made the trip now by either their own automobile or the automobile of a friend or relative. Eight of the 111 respondents did not indicate whether or not they made the trip.

Another 52 Ozaukee County residents completed and returned the survey, including 16 persons who were found to be current users of the existing specialized transportation services within the County. However, it would not be reasonable to consider that all 52 had transportation needs which are not being met by the present special transportation services. The trips described by these survey respondents that they would like to make on the special transportation services were all possible to make on the existing services, that is, they were entirely within Ozaukee County, would be made on weekdays, would be between the hours of 8:00 a.m. and 5:00 p.m., and would be made three or fewer times per week. It should be noted that eight of the 52 respondents indicated that they used their own automobile or the automobile of a friend or relative to travel now, and that they completed the survey to indicate that they could have a potential need for service in the future. Another 11 of the 52 respondents noted that, until the survey, they were unaware that the existing services could meet their needs. Comments by eight of the 52 respondents could indicate the need for review and possible modification of the existing services. Of these eight survey respondents, two were residents of the City of Port Washington and were eligible to use the City's specialized transportation service; two were residents of the City of Cedarburg and were eligible to use that City's specialized transportation service; and the remaining four were residents of other Ozaukee County communities and were eligible to use the County's special transportation service. One of these eight respondents indicated that the present services did not permit full choice of destination for certain trips such as shopping. Two indicated difficulties entering and exiting the vehicles which provided the service. Three indicated that the present services occasionally required rescheduling of the shopping or personal business travel. One indicated that medical assistance was required during travel and the present services did not provide such assistance.



## **APPENDICES**

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Appendix A

OZAUKEE COUNTY TRANSPORTATION COORDINATING COMMITTEE

Rhea Yovanovich, Chairman.....	Director, Port Washington Senior Center
Susan Larson, Secretary.....	Executive Director, Community Learning Center
John G. Blank.....	Supervisor, Ozaukee County Board
Clarence Behling.....	Supervisor, Ozaukee County Board; and Member, Ozaukee County Commission on Aging
Janet Casper.....	Member, Ozaukee County Comprehensive Services Board
Sharon Freeman.....	Aging Services Director, Ozaukee County Office of Aging Services
Sandra Hanson.....	Member, Ozaukee County Disabled Citizens, Inc.
William A. Heimlich.....	Planning Supervisor, Wisconsin Department of Transportation, District 2
Frederick R. Hesselbein.....	Program Director, Ozaukee County Comprehensive Services
Lawerance A. Neve.....	Director, Ozaukee County Department of Social Services
Helen A. Ramon.....	Executive Director, Southeastern Wisconsin Area Agency on Aging
John Regenfuss.....	Executive Director, Portal Industries, Inc.
Fanita Schemel.....	Citizen Member
William A. Schroeder.....	Chairman, Ozaukee County Board
Evelyn Welter.....	SEN-HAN, Inc.

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PHONE: (414) 284-9411  
377-6400  
Ext. 279-280

Appendix B  
OZAUKEE COUNTY  
OFFICE OF AGING SERVICES

SHARON FREEMAN  
DIRECTOR

Courthouse, Room 302  
P.O. Box 307  
PORT WASHINGTON, WISCONSIN 53074-0307

January 5, 1987

Dear County Resident:

The Ozaukee County Office of Aging Services is conducting a survey of county senior citizens and handicapped residents to identify the transportation needs of our elderly and handicapped residents that are not being met by current services. The information that is gathered in this survey will be used to assist our office in planning for improvements in transportation service to the elderly and handicapped residents of Ozaukee County.

If you believe that the existing specialized transportation services within Ozaukee County are adequately meeting your transportation needs, then we ask that you disregard this survey. If, on the other hand, you believe that you have transportation needs which cannot be met by the existing specialized transportation services, then we ask that you fill out the survey form enclosed with this letter and return it to the Office of Aging Services, using the accompanying self-addressed envelope.

The survey requests data for trips that you would like to make by special transportation services within Ozaukee County but are unable to make using the specialized transportation services which are currently available within the County. It is important that you describe only those trips that you are currently unable to make using existing services if the Office of Aging Services is to accurately establish a description of the unmet transportation needs of senior citizens and handicapped persons.

The Office of Aging Services wants to assure you that your response to the survey will be kept entirely confidential. The data obtained will be presented only in combination with data from other persons surveyed. Individual responses to surveys will not be reported or released by this office.

Should you have any questions concerning completion of this survey form, or about your participation in the survey, please do not hesitate to contact me at 284-9411 or 377-6400, extension 279 or 280. Thank you for your cooperation.

Sincerely,



Sharon Freeman  
Aging Services Director

SF/  
Enclosures

Appendix B (continued)  
OZAUKEE COUNTY  
OFFICE OF AGING SERVICES

ELDERLY AND HANDICAPPED NEEDS SURVEY

I. Please provide us with some information concerning your age, any mobility limitations you may have, and your home community.

1. What is your age?

☐ 18 or under.

☐ 19-59

☐ 60 and over.

2. Are you disabled?

☐ No

☐ Yes

If you answered yes, how does your disability affect your mobility?

☐ Have trouble getting  
around

☐ Confined to house.

☐ Use aid other than  
wheelchair (cane, walker,  
crutches, brace)

☐ Other \_\_\_\_\_

☐ Use wheelchair

\_\_\_\_\_  
(Please describe)

3. What is your home community?

☐ City ☐ Village ☐ Town of \_\_\_\_\_

II. Please tell us about the most important trip you are unable to make using the existing specialized transportation services within Ozaukee County. Describe the trip as completely as possible. Do not describe a trip you presently make using an existing specialized transportation service.

4. This trip would be made:

☐ Within your  
home community.

☐ Between your home community and  
another community outside Ozaukee  
County. Please specify  
community outside Ozaukee County:

☐ Between your home  
community and  
another community  
in Ozaukee County

\_\_\_\_\_  
\_\_\_\_\_

5. What would be the purpose of the trip?

☐ Work

☐ Nutrition Site Meal

☐ School

☐ Shopping

☐ Social/Recreational

☐ Other:

☐ Medical/Dental

☐ Personal  
business

\_\_\_\_\_  
(Please specify)

Appendix B (continued)

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6. Do you make this trip now without using an existing specialized transportation service?

☐ No

☐ Yes

If you answered yes, how do you make this trip now?

☐ By your own car

☐ Other: \_\_\_\_\_

☐ By car of a relative  
or friend

\_\_\_\_\_  
(Please specify)

If you answered no, why do you not use an existing specialized transportation service--such as the Ozaukee County Office of Aging Services van, the Cedarburg senior citizens van, or the Port Washington senior citizen van--to make this trip?

☐ Not aware of existing  
service

☐ Other: \_\_\_\_\_

☐ Trip not served by  
existing service

\_\_\_\_\_  
(Please describe)

7. Would this trip occur on a weekday, a Saturday, or a Sunday?

☐ Weekday

☐ Saturday

☐ Sunday

8. Would this trip occur during the morning, afternoon, or evening?

☐ Early morning (before  
8:00 a.m.)

☐ Afternoon (12:00 p.m. to  
5:00 p.m..)

☐ Morning (8:00 a.m. to  
12:00 p.m.)

☐ Evening (after 5:00 p.m.)

9. How many times each month would you make this trip? \_\_\_\_\_

10. Fees paid by users for each one-way trip on the existing specialized transportation services currently range from \$0.50 for local trips to \$5 for long trips. Would you be able to pay what is currently charged on the existing services?

☐ No

☐ Yes

11. Please provide us with your name and telephone number. This information is optional and will only be used if an explanation of your survey responses is required.

Name: \_\_\_\_\_

Telephone Number: \_\_\_\_\_

III. If you would like to tell us about additional trips which you are unable to make on the existing specialized transportation services, you can do so by requesting an additional survey form from the Ozaukee County Office of Aging Services at 284-9411 or 377-6400, extension 279 or 280.

Thank you for your response

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**SOUTHEASTERN WISCONSIN REGIONAL  
PLANNING COMMISSION STAFF**

Kurt W. Bauer, PE, AICP, RLS. . . . . Executive Director  
Philip C. Evenson, AICP . . . . . Assistant Director  
Kenneth R. Yunker, PE . . . . . Assistant Director  
Robert P. Biebel, PE . . . . . Chief Environmental Engineer  
John W. Ernst. . . . . Information Systems Manager  
Gordon M. Kacala . . . . . Chief Economic Development Planner  
Leland H. Kreblin . . . . . Chief Planning Illustrator  
Donald R. Martinson . . . . . Chief Transportation Engineer  
Bruce P. Rubin . . . . . Chief Land Use Planner  
Roland O. Tonn, AICP . . . . . Chief Community Assistance Planner  
Joan A. Zenk . . . . . Administrative Officer