

## Products From The Beverly Foundation

In the nine years that the Beverly Foundation has undertaken research and demonstration activities in the area of senior transportation, it has produced numerous reports, publications, articles, snapshots, and a technical materials book from its research and demonstration activities. Below are several examples.

### Major Beverly Foundation Products

- 1999 *Transportation in an Aging Society: Focus Group Project Report*
- 2000 *Supplemental Transportation Programs for Seniors (AAAFTS)*  
*Transportation for Elders: The Tie That Binds (ASA's Generations)*
- 2001 *The Human Side of the Enterprise (Beverly Enterprises)*
- 2002 *Directory of STPs in America*
- 2003 *Adult Day Services Report (the Archstone Foundation)*
- 2004 *Transportation for Older Adults: Options Booklet*  
*Innovations for Seniors: Public and Community Transit Services (CTAA)*  
*A Report on STPs in America (AAAFTS)*
- 2005 *Focus Group Report on the TRIP Program (TRIP)*  
*How to Establish and Maintain Door-Through-Door Transportation (Westat)*  
*STAR Search 2004: Report on Volunteer Driver Programs*
- 2006 *Volunteer Driver TurnKey Kit*  
*Risk Management in Volunteer Driver Programs (AARP)*  
*Stories from the Road: Stories from the Heart*  
*Volunteer Driver Recruitment: An Idea Book for Action*  
*Transportation Innovations for Seniors: A Report from Rural America (CTAA)*  
*STAR Search 2005: Report on Volunteer Driver Organizations and Drivers*
- 2007 *California Clearinghouse of STPs: A STAR Search 2006 Report*  
*A "How To" Guide for Developing a Statewide Clearinghouse of STPs*  
*Volunteer Driver Tip Book*  
*Transitions to Options: How They Affect Older Adults (APTA)*  
*NCST Fact Sheet Series (NCST)*  
*STAR Search 2007: A Report on Faith in Action Transportation Programs*
- 2008 *Public Transportation Programs for Seniors: Final Report (APTA)*  
*Transportation 101: How To Start a Volunteer Driver Program*  
*Brief on Volunteer Drivers*  
*2008 Fact Sheet Series*

For more information about these and other products produced by the Beverly Foundation, please visit the Beverly Foundation website ([www.beverlyfoundation.org](http://www.beverlyfoundation.org)) or the website of the STP Exchange ([www.stpexchange.org](http://www.stpexchange.org)).

# Beverly Foundation

Fact Sheet Series Vol. 1 (1)

# The Beverly Foundation

## Highlights

- **History**  
*Originally organized and funded by Beverly Enterprises*
- **An Early Pioneer**  
*In 2000, the Foundation revised its mission and became a pioneer in transportation options for older adults*
- **Innovative Projects/Results**  
*Details the Foundation's research and demonstration projects and their practical results*
- **Methods of Operation**  
*Describes a small organization that leverages its research and demonstration capacity through partnerships*
- **A 2008 Transition**  
*Outlines the Foundation's method of streamlining its operations*
- **Products**  
*Provides a list of major products developed by the Foundation during the past nine years.*

**September, 2008**

For More Information Visit  
[www.beverlyfoundation.org](http://www.beverlyfoundation.org)



The Beverly Foundation  
Pasadena, CA

## History

The Beverly Foundation was organized in 1979 by Beverly Enterprises.<sup>1</sup> At the time, the Corporation was the largest provider of long term care in the United States. The Foundation's purpose was to develop long term care informational and training materials and provide technical assistance for the professional staff, the corporation, and other providers. In 1984, the corporation granted stock options to the Foundation, and the proceeds from their sale enabled the Beverly Foundation to become an independent, 501(c)(3) operating foundation.

### The Beverly Foundation At A Glance

**Patron** Beverly Enterprises  
**Date Organized** 1979  
**Date of Independence** 1984  
**Organizational Status** Operating Foundation  
**Location** Pasadena, California  
**Initial Purpose** Long Term Care Materials & Training  
**Current Mission...**  
*to foster new ideas and options  
 that enhance mobility and transportation  
 for today's and tomorrow's older adults*

## Senior Transportation Agenda

In 2000 the Trustees of the Foundation recognized the importance of transportation in facilitating the public policy agenda that encourages older adults to remain in their homes as long as possible. While the Foundation's Trustees were concerned about the role of transportation in getting services to isolated, homebound elders; they believed it was even more important to get elders out of their homes and to the places they needed to go. In focusing on senior transportation, the Foundation not only made the transition from institutionally-based long term care; it also focused on what may be the most critical element of community-based support for older adults.

<sup>1</sup>Beverly Enterprises was founded in 1963, and founded the Beverly Foundation in 1979. In 2005, the corporation was purchased by Golden Gate Enterprises.

**An Early Pioneer**

In 1999, the vast majority of initiatives in senior transportation addressed the challenge of senior driver safety. The theme of the Beverly Foundation's transportation initiative was: "in order to limit driving or stop driving, older adults must be able to access transportation options in their community so they can get to both life-sustaining and life-enriching destinations and activities". At that time, little was known about what type of transportation options existed, where they were located, and whether they were successful.

The Beverly Foundation began its research on senior transportation with the purpose of identifying and documenting transportation options for older adults. The results were used to undertake demonstrations and prepare reports and technical materials for organizations interested in promoting transportation options for older adults.

**Illustrative Projects**

**Major Research and Demonstration Initiatives**

- Focus Groups on Attitudes About Driving...1999*
- STP (Senior Transportation Program) Mobilizer Project...2000*
- Volunteer Friends Pilot Project in Pasadena, CA...2001*
- Directory of Transportation Options...2002*
- Innovations in Transportation for Seniors...2003*
- Senior Transportation in Rural America...2004*
- Risk Management and Volunteer Driver Programs...2005*
- Clearinghouse of Transportation Options...2006*
- Understanding Transportation Transitions ...2007*
- Survey of Public Transportation and Seniors...2008*

While it dedicates some of its resources to support its STAR Search/STAR Awards program, the Foundation dedicates the bulk of its resources to support its projects at the local, state, and national levels. One of its earliest initiatives was a *Volunteer Friends* pilot project in Pasadena, CA which was undertaken in partnership with the AAA Foundation for Traffic Safety. Other endeavors that

have contributed to the field of senior transportation include research on volunteer driver programs and volunteer drivers, research on innovations in rural transportation for older adults, and research on efforts by public transportation services to meet the transportation needs of older adults.

**Innovative Results**

In the past nine years, the Beverly Foundation has identified and documented almost 1,000 transportation options for older adults which it labeled STPs (Supplemental Transportation Programs for seniors); and has surveyed more than 700 volunteer drivers. While its research efforts have produced a large body of data, the methods used for gathering the data and the results of data analysis are what make its work exceptional. For example, the Foundation's surveys of STPs are undertaken through national networks. Additional research methods have included key informant inquiries, and focus group projects which gather both qualitative and quantitative data. Its early focus group efforts identified the 5 A's of Senior Friendly Transportation (availability, acceptability, accessibility, adaptability, and affordability) and those 5 A's were later adapted to a method of calculating senior friendliness. Data collected on STPs provided important information on the assistance needs of senior passengers and the inability of traditional transportation services to meet those needs; and data collected on volunteer driver programs resulted in considerable "how to" information in the form of a TurnKey Kit for planning a volunteer driver program. These are but a few of the examples of innovative results of the Beverly Foundation's research.

**New Areas of Exploration**

- Research Initiatives...*
  - Combining Quantitative and Qualitative Methods*
  - Surveying Organizations through National Networks*
  - Resulting in National Data and Information*
- Senior Transportation Research Identifying...*
  - STPs in America*
  - The 5 A's of Senior Friendliness*
  - Special Issues About Volunteer Driver Programs*
  - Special Transit Assistance Needs of Seniors*
  - Transitions of Seniors to Transportation Options*
- Materials Development On...*
  - How To Organize STPs and Volunteer Driver Programs*
  - How To Assess and Limit Risk*
  - How to Organize a Volunteer Friends Model*
  - How To Calculate Senior Friendly Transportation*

**Methods of Operation**

The Beverly Foundation maintains its offices in Pasadena, CA and supports a small technical staff. It supplements its staff with senior advisors, consultants, and the technical and operational support of its trustees. In most instances the Foundation undertakes projects in partnership with other national organizations. For example, the AAA Foundation for Traffic Safety was one of its early senior transportation partners and continues as a partner in a new initiative called the STP Exchange described below. Other partners have included AARP, the Community Transportation Association of America, the American Public Transportation Association, the American Society on Aging, the National Center on Senior Transportation, Shepherd's Centers of American, Easter Seals Society, Faith in Action, and Beverly Enterprises. While its partners often co-fund project initiatives, its partnerships have the primary purpose of linking with technical expertise and providing channels for distribution.

**Major Transportation Partners**

- AAA Foundation for Traffic Safety*
- Community Transportation Association of America*
- American Public Transportation Association*
- National Center on Senior Transportation*
- The ENO Foundation*

**A 2008 Transition**

In 2008, the Beverly Foundation embarked on a strategy which set the stage for mining its database, preparing professional and consumer publications, streamlining its research methods, expanding its distribution methods, and creating opportunities for information exchange among STPs in America. What follows are several examples of the results. (1) As a follow-up to a 2007 fact sheet project with the National Center on Senior Transportation (NCST), the Foundation set out to prepare a series of 10 fact sheets describing its activities and their outcomes. A list of these fact sheets is presented below\*. (2) In addition to preparing articles on public transportation services for older adults, the Foundation also drew on information and data on volunteer driver programs and volunteer drivers to prepare a workbook on organizing a volunteer driver program and a briefing paper and article on volunteer drivers. (3) In recognition of the growing concern regarding dementia and driving, the Foundation addressed the importance of dementia friendly options by preparing written materials, making presentations, and adapting its senior friendliness calculator as a "dementia friendliness calculator". (4) For the first time, the Foundation's annual STAR Search survey was administered online, and targeted inquiries on the impact of fuel and the impact of mileage reimbursement were administered via e-mail and on-line surveys. (5) Timely feedback on the results of STAR Search was provided to winners of the \$50,000 in STAR Awards via personal letter (and check) and general notification was provided via e-mail and media release. Timely feedback on the results of the targeted surveys was provided via media releases and e-mail announcements which linked respondents to survey results and reports. (6) In early 2008, the Beverly Foundation created the STP Exchange for information and idea exchange among STPs in partnership with the AAA Foundation for Traffic Safety and the Independent Living Partnership. The STP Exchange provided the venue for the 2008 STAR Search survey.

**2008 Initiatives**

- Data Application...*
  - 2008 Fact Sheet Series\**
  - Transportation 101 (Vol. Driver Program Workbook)*
  - Brief on Volunteer Drivers*
  - Work on Dementia Friendly Transportation*
- Articles...*
  - Public Transportation Programs for Seniors*
  - Transportation for People with Dementia*
  - Volunteer Driver Contributions*
- Research Methods....*
  - On-Line Surveys of STPs*
  - Targeted Inquiries on Special Issues*
- Exchange Methods...*
  - Feedback on Targeted Inquiries*
  - The STP Exchange*

ness calculator". (4) For the first time, the Foundation's annual STAR Search survey was administered online, and targeted inquiries on the impact of fuel and the impact of mileage reimbursement were administered via e-mail and on-line surveys. (5) Timely feedback on the results of STAR Search was provided to winners of the \$50,000 in STAR Awards via personal letter (and check) and general notification was provided via e-mail and media release. Timely feedback on the results of the targeted surveys was provided via media releases and e-mail announcements which linked respondents to survey results and reports. (6) In early 2008, the Beverly Foundation created the STP Exchange for information and idea exchange among STPs in partnership with the AAA Foundation for Traffic Safety and the Independent Living Partnership. The STP Exchange provided the venue for the 2008 STAR Search survey.

*\* Many of the research initiatives and program activities are described in detail in the Beverly foundation's 2008 Fact Sheet series. The 10 Fact Sheets in this series include: #1 The Beverly Foundation; #2 Giving Up The Keys; #3 STPs in America; #4 STPs in Rural America; #5 Transportation Assistance; #6 Volunteer Driver Programs; #7 Volunteer Drivers; #8 Transportation and Dementia; #9 Volunteer Friends Model; #10 STAR Search/Awards.*