Transportation Innovations for Seniors

A Synopsis of Findings in Rural America

Produced by

The Beverly Foundation

and

The Community Transportation Association of America

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A Synopsis of Findings

Introduction

The Beverly Foundation and the Community Transportation Association of America are pleased to present this synopsis of Transportation Innovations for Seniors in Rural America. The study, on which the report is based, was undertaken as a partnership effort of the two organizations.

The purpose of the project was to understand the context of senior transportation in rural areas; to identify transportation needs, services, challenges, and solutions; and to explore the concept, practice, and promotion of innovations within transportation services. The project coincides with the growing importance of transportation to senior and transportation service providers, seniors and their family members, and to our society as a whole.

"In rural communities, if you can't drive you probably have difficulty getting where you need to go."

The effort to understand innovation and the factors that promote it required the collection of considerable data beyond the topic of innovation. For example, it was important to understand the rural environment in which seniors live and services are provided; to be aware of their transportation needs, available services and the gaps between them; and to appreciate the many transportation challenges and solutions that have been developed. Only when the environment was understood was it possible to understand what precipitates innovation, what it looks like after it occurs, and how innovations can be shared with other organizations.

The inquiry process involved structured interviews with 52 key informants, who brought an average of 24 years of experience to the study for a total of more than 1,000 years of experience. Interview participants included policy makers, researchers, technical advisors, and transit and aging service providers. The interviews were conducted in the fall and winter of 2004 and included three general and several sub topics: (1) topics specific to rural America, (2) topics specific to seniors, and (3) topics related to innovations and ways to promote them. The 5 on-site case studies were undertaken in mid-2005 and were conducted with transportation services that exemplify multiple innovations in providing services to seniors. The sites were selected by the key informants as exemplifying multiple innovative solutions for meeting the challenges of providing transportation to seniors.

This synopsis provides a brief discussion of the rural environment in which seniors reside and transportation is provided, transportation needs, services and gaps, transportation challenges and solutions, and the factors that contribute to and promote innovation. A complete 3-part report is available in electronic form and on the websites of the partners: www.beverlyfoundation.org and www.ctaa.org.

1. Seniors in Rural America

In 2000, 23% of America's older persons lived in rural areas. Rural America is proportionately older than urban America, with older adults making up 18% of the population in 1997 compared to only 15% in urban areas. The increasing number of older adults, especially those age 85+, and their growing demand for specialized services because of frailty is viewed as one of the major challenges that must be met by transportation providers.

The percentage of senior drivers in a community declines with age. A recent study of driving expectancy reported in an article in The American Journal of Public Health indicates that there is a difference in life expectancy and driving expectancy. The implication is that both men and women will live for a period of time (as many as 6 years for men and 11 years for women) when they will be transportation dependent. It is the age 85+ population that is especially vulnerable to the need to give up their keys and become transportation dependent.

"One third of rural America does not have public transportation services."

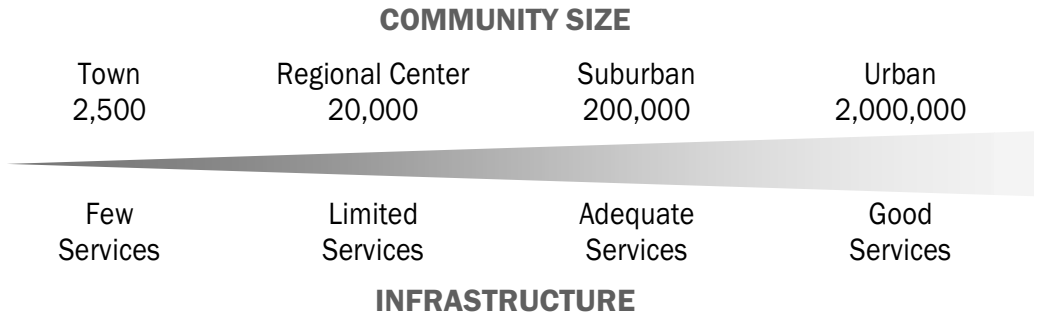
Senior conditions of frailty, poverty, and lack of family can affect the transportation options people have. When a woman is 90 she may not be able to get to the bus and wait for it. A person who has limited income may not be able to afford a car or be stranded when their ambulance trip to emergency medical service is denied. Family and community social supports may be absent or there may be no non-working relatives. This only increases the difficulties in both accessing transportation and providing it.

According to demographic data, nearly 40% of the country's transportation dependent population lives in rural areas. The high percentage of this population group is due in part to the large percentage of older adults. The proportion of the elderly population has grown as a consequence of aging in place, the outward flow of the younger population to urban areas, and retiree in-migration. The result is an increase in the population that is less mobile and less able to drive or to navigate transportation services. The growing number of older people, especially the age 85 and over population, and their growing demand for specialized services due to frailty is viewed as one of the major challenges that must be met by transportation providers.

2. The Rural Environment

Rural America often is defined as counties located outside the boundaries of metro areas with no cities with 40,000 or more residents.

Distance is what often defines the geographical landscape of rural America. In many rural areas, distance from home to work, to shopping, to a health



center, or to a volunteer activity may be 50, 70 or even 100 miles. The problem of distance is often compounded by poor road conditions and limited transportation alternatives. Consequently, distances between the people and their destinations make transportation extremely difficult.

However, the problem of distance also is related to the declining infrastructure of many rural communities. For example, many community-based services (the local doctor, health clinic, supermarket, library, bank, theatre, senior center, or beauty shop) are relocating to larger communities or to regional or urban centers. The result is twofold, for not only does the infrastructure of the community suffer, the people that depend on the availability of its services also suffer.

The decline in the infrastructure of many small towns and the distances between residences and services not only contribute to the isolation of the senior population but also complicate the delivery of services to their homes and the delivery of transportation to enable them to access important activities. The illustration above suggests the potential relationship between community size and infrastructure.

"Geography can lead to isolation of people and inability of transportation providers to organize efficient services."

3. Transportation Needs

The need for transportation is defined as "requiring transportation to get where you need to go". Destination travel to what often are described as life sustaining and life enriching destinations receives most of the attention. In many instances, travel to non-emergency medical services is viewed as the greatest need of seniors who live in rural America. At the same time, many of those interviewed for the study discussed the importance of quality of life travel. However, it is important to point out that, in the case of older adults, transportation is not always about destination, for in many instances, it also may fill the need for socialization.

While destination travel is important, "supportive transportation" also is important, especially to older adults who need assistance to and from the vehicle and at the destination. Many seniors are too weak to get on the bus, or too frail to get to the curb to catch the van, or unable to go from the vehicle into the destination without someone to help them.

4. Transportation Services

When people no longer drive, and family members can't drive them, community based transportation services may be their only hope of being able to get where they need to go. In many rural communities, a variety of transportation options are available to them. These include public transportation paratransit services; ADA transit services that correspond to the Americans with Disabilities Act legislation; private transit services;

Important Qualities of Transportation Services

on time service	courteous drivers
reassuring schedule	dependability
accurate scheduling	safety
regularly scheduled service	security
reliability	flexibility in pick up location
few connections	comfortable vehicles
convenience	not having to wait

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specialized transit programs operated by health and human service providers such as hospitals, senior centers, nursing homes and adult day services for clients, customers or patients; and supplemental transportation programs for seniors operated by private sector transit services, community groups, and volunteer groups. Interestingly, many transportation services in rural America have evolved from their origin as senior transportation programs to services that provide transportation for the general population.

The human service experience of many rural transportation providers appears to be a critical factor in having the customer focus necessary for providing transportation to seniors. If, as suggested by many experts, seniors will only use public transportation if they are treated with dignity and have confidence that their quality of life needs will be met, the human service orientation may be a critical factor in providing transportation to seniors. Other considerations of the customer focused system include flexible scheduling, appropriate vehicles, personalized one-on-one service such as door-to-door, door-through-door, and assistance at the destination.

"There is a big spike in limitations starting in the early 80's."

In operating transportation services, providers tap into a wide array of vehicles; and insurance and maintenance and repair are important considerations and a major expense. Local funding sources may make it necessary for providers to limit their service area to the local community or county. Regardless of the area served, communications are central to the delivery of transportation in rural areas, and technology is seen as important to improving schedules and customer service.

Funding for community based transportation in rural America is provided through a variety of sources. Many programs apply for grant support from government and private funding agencies and develop relationships with human service agencies to provide their transportation services. In many instances, providers also undertake fundraising activities because their passengers can't pay the full costs of transportation. The lack of growth in funding and new funding streams, the need to match funds, inconsistency in local transportation funding, earmarks for capital expenses but not for operating expenses, and the need to coordinate multiple sources and funding streams are a fact of life for rural transit providers.

5. Transportation Gaps

Transportation gaps are defined as the disparity between what is needed and wanted and what is available or provided. According to our experts, gaps occur when there is a disparity between needs for service and services that are provided. Seniors, their caregivers, and human service providers face numerous transportation gaps. Three types of gaps were identified: (1) needs/services, (2) infrastructure/support, and (3) expectations/realities.

Underlying many of these disparities is what has been called "the money gap" in what some call the lack of investment in systems and services. "The money gap" is also the result of the low population density and greater distances to destination that not only limit the ability of communities to meet the transportation needs of residents, but also limit the ability of transportation services to provide efficient and cost effective transportation services.

6. Everyday Challenges

The consequences of physical limitations which make it difficult or impossible to drive often result in the need for a variety of services, including transportation.

Such limitations and medical treatments that enable people to live longer create everyday challenges for transportation services in meeting the needs of

senior customers who require a higher level of care and support. Thus, providing "supportive transportation services" appear to be the norm rather than the exception for many transit providers. The everyday challenges that result include insuring the activities, maintaining a service schedule, training and paying drivers to provide assistance, and undertaking time consuming and expensive services such as going through-the-door of the residence or staying with passengers at the destination. As one expert said, "The cost of transportation for specialist care is very high. It is expensive to tie up a driver and a vehicle for ten hours. We charge $15 per hour so it might be $150 for a person to go to dialysis once a week, and many need to go three times a week."

Destination travel, especially long distance medical trips, present major challenges to transportation services. While such trips are necessary, they, like supportive transportation services, are time-consuming, and extremely expensive. And, according to our experts, the need for such trips is increasing dramatically. The challenge of helping people maintain their dignity and independence by providing quality of life transportation also presents a challenge for it is often not economical and in many instances political decision makers are not supportive of providing transportation for non essential purposes.

"In rural areas, people can make more money delivering pizza than delivering people."

Another important challenge that transportation providers must address in providing services to seniors emphasize the **5 A's of Senior Friendly Transportation**: treating seniors like customers, fielding drivers and staff who are sensitive to the needs of seniors, making services less intimidating, ensuring that seniors know about the services and how to use them, providing acceptable vehicles, making sure service is affordable, making schedules more flexible, and operating services efficiently and cost effectively. Another challenge, and according to some experts the biggest challenge, is staying solvent. Such challenges are not expected to diminish with the aging of the boomer population, for they are viewed as having even greater expectations than the current generation. According to some, the real problem is that social purposes that keep people connected to the community often do not get funded. The whole issue of isolation is under-recognized, under-studied, and under-funded.

7. Everyday Solutions

A number of our experts raised questions about the value and cost of a two-track transportation system: one for the general population and another one for seniors. Others suggested that providing good transportation for the public does not necessarily result in good transportation for seniors, but improving transportation for seniors will improve transportation for everyone. Many references were made to the fact that it often is the senior programs that step up to the plate to provide transportation to frail seniors. And, in many rural communities, when there is a single track program, it is because senior transportation services evolved over time to become the rural transportation service for everyone.

Many everyday solutions were suggested for meeting the challenges of providing transportation to seniors. (1) supportive transportation solutions: providing support outside the vehicle, filling the gap between bedside and curbside, training drivers, exploring insurance options, creating flexible scheduling methods, providing single passenger rides, and using appropriate vehicles; (2) senior friendliness solutions included attention to each of the 5 A's of availability, acceptability, accessibility, adaptability, and affordability; (3) general service solutions: considering seniors as customers, creating more productive travel arrangements, developing flexible scheduling methods, paying and training staff and involving volunteers, leveraging the use of available and unused vehicles, expanding the use of technology,

and participating in the use of insurance pools all of which could improve service quality, efficiency, and cost effectiveness. The chart below suggests several of the service solutions.

Almost all the experts identified community relationships, outreach activities and partnership arrangements as critical ingredients of problem solving for any transportation service, especially a service that provides transportation to seniors. Partnerships were viewed as important for service delivery, for service support, for connecting with programs geared to seniors, for working with people who can make things happen, and for creating an "ownership in success".

Most experts saw money as a key solution because rural communities are faced with inadequate funds and the on-going need for more. While there was general agreement that everyone is in a tight budget situation and there is no easy funding solution, numerous methods for securing it were suggested: changing the perceptions of potential funding sources, shaping an appropriate message about transportation for seniors, being responsive to financial constraints, creating public/ private partnerships, linking funding sources, encouraging education advocacy, finding ways to promote recognition, securing dedicated funding, and using vehicle funding to buy trips. "Attitude adjustment" on the part of seniors, transportation providers and local decision makers was viewed as a key method for improving the cost effectiveness and the funding base of transportation for seniors.

"There is a transit axiom... the longer the distance, the lower the density, the higher the costs."

8. Keys to Innovation

In addition to everyday solutions, many rural transportation services successfully introduce novel products, services and models. When such efforts produce a new or novel change from the norm or standard way of doing things, those changes are known as innovations. While leadership generally is viewed as the key to innovation, the experts interviewed for this study identified four additional elements.

A Point of Origin. A transportation service faces a major financial crisis, partially because of fixed costs, 50% of which are related to driver salaries. The service may be forced to close its doors.

An Idea Factory. The service's manager confronts the possibility of going out of business by considering the possibility of creating a volunteer driver program as a key element of its service delivery.

People Markers. Even though he is a visionary, entrepreneur, and risk-taker, the manager brings together a community group that is a source of innovative ideas and turns the good idea into an innovative model for recruitment of drivers by riders and riders by drivers.

Everyday Service Solutions

on time service	safety	convenience
reassuring schedule	few connections	regularly scheduled service
accurate scheduling	dependability	courteous drivers
pick up location flexibility	quick response	comfortable vehicles
reliability	security	not having to wait

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A Receptive Culture. The flexible structure of the transportation service, its collaborative atmosphere and its openness to change create the organizational environment in which the volunteer driver model can be implemented thus turning a creative idea into a new way of doing things.

As a group, they suggest an innovative process from its point of origin, flowing through the idea factory, experiencing a value added of traits or markers of the innovator, and entering a receptive culture in order to become an innovation.

The chart below provides examples of the people who inhabit the idea factory, the characteristics of the innovators and the type of organizational culture that might be receptive to change.

The examples illustrates the point that an innovation is often related to the ability of leaders to distinguish a problem from an opportunity, to turn a creative idea into an innovative idea, and to construct an environment that is receptive to the change that is necessary for the adaptation or adoption of an innovation. While any one of these elements can promote innovation, as a group, they are a powerhouse for change. The result can be the difference between a mediocre improvement and a change from a standard way of doing things.

"If you have a BORPSAT you can accomplish anything."

9. Promoting Innovation

One way to promote innovation would be to create innovators. However, some experts alluded to something like "an innovation gene" and others simply said they did not think it was possible to instill the ability to innovate in people. There was, however, general agreement that innovators have special characteristics or traits, and once they are discovered, they can be cultivated and nourished. Perhaps the first task is to look for leadership with respect to the person or people who are leaders, and the second is to look for traits or markers of the innovator. The third task is to cultivate innovators through training programs, meetings and conferences. Mentoring and internships were suggested as a means of cultivating the next generation of innovators.

Whatever the cultivation method, the culture of the organization in which innovators toil will determine if the innovative idea becomes an innovation. Therefore, creating an organizational environment

Elements of Innovation

An Idea Factory	People Markers	A Receptive Culture
key person	imagination	willingness to change
starts at the top	optimism	collaborative relationships
advisory group or board	courage of convictions	scarcity & desperation
local or county officials	opportunistic approach	knowledge of community
the manager	curiosity	community involvement
board of directors	passion	necessity
a sparkplug	charisma	limited resources
the leader	energy and vision	willingness to change
a BORPSAT*	the innovation gene	avoids one best way

*A BORPSAT is a bunch of the right people sitting around a table.

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in which innovative people and ideas can flourish is critical to innovation. Among other things, an internal system that is collaborative and open to change, communication and exchange relationships with other organizations and the environment, and even organizational poverty were mentioned as conducive to an innovative culture. As one expert commented, "if wealth promoted innovation, it would be the people with all the resources doing all the great stuff".

Transportation services in rural America tend to see themselves as obligated to share their concepts and practices as well as their innovations with their neighbors and others in their network. Usual strategies used by the innovator include communication through publications, conferences, training, technical assistance, and demonstration programs. Of course, the innovations that are being shared need to be easy to understand and use, perceived by others as having an advantage over what exists, recognized as having evident results.

"Many of our innovations are by necessity, not by design."

Successful adopters of innovations also realize that what works in one community won't always work in another community. For example, the manager or service director who tries to replicate or duplicate an innovation in its entirety may not be successful. On the other hand, such efforts may be successful if the innovation is adapted to be congruent with the values, experiences, and needs of the leaders; and the culture of the target organizations is receptive to the change that will result.

10. Case Studies

While there are many experts who say it is not possible to create an innovator, there is general agreement that the potential for innovation can be cultivated within the individual and within the organization. The five case studies that were developed in conjunction with this project were undertaken with the following transportation services.

Prairie Hills Transit
(Spearfish, South Dakota)

York County Community Action Corp.
(Sanford, Maine)

OATS
(Columbia, Missouri)

Sedgwick County Department on Aging
(Wichita, Kansas)

CARTS
(Austin, Texas)

The presentation of each case study includes information about the history, location and transit operations of the transportation services and details three innovations. The discussion of each innovation includes its context within which it occurs with regard to leadership and environment. Each example conveys the message of the significance of the point of origin or impetus for action, the people who promoted innovation, the character traits that set them apart from ordinary leaders, and the culture of the organizations which allowed the innovations to thrive.

Summary

The report produced five important messages about transportation for seniors in rural America.

(1) The out-migration of the younger population, and the in-migration and aging-in-place of the older population, has resulted in an increase in the population that is less mobile and less able to drive or navigate transportation services.

(2) Many seniors, especially those who are frail and in need of assistance, depend on community

transportation services to get to both life sustaining and life enriching activities.

(3) Transportation services face numerous operational and financial challenges in meeting the transportation needs of seniors.

(4) Transportation services generally address everyday challenges such as scheduling with everyday solutions such as technology.

(5) In addition to everyday solutions, many transportation services successfully introduce new or novel changes from the standard way of doing things. Such changes generally are described as innovations.

Perhaps the most important message is that, although transportation services in rural America are faced with enormous challenges, many of them "do a lot with a little" and not only have the ability to solve problems, but are able to mobilize the leadership necessary to develop and adapt innovative change.

Note

Look for the 4-part report and additional information related to senior transportation on the following websites:

www.beverlyfoundation.org
and
www.CTAA.org

"Sometimes it takes a long time to find the key person to make something happen."

This synopsis was produced in 2006 by the Beverly Foundation of Pasadena, California. Printing and distribution of the brochure was facilitated by the Community Transportation Association of America (CTAA). The overall project was undertaken as a partnership between the two organizations.

52 Key Informants

Introduction

The following list of 52 transportation providers, policy makers/planners, researchers, consultants, funders, and association staff members were interviewed in the course of this project. These interviewees are referred to as experts and key informants. The categories listed below are based on self-described roles identified by the key informants.

Transportation Providers

Cathy Brown
St Johns Council on Aging, St. Augustine, Florida
Alan Cantrell
Access Services, Los Angeles, California
Barbara Cline
Prairie Hills Transit, Spearfish, South Dakota
Richard DeRock
Link Transit, Wenatchee, Washington
Dan Dirks
SMART, Detroit, Michigan
Ira Doom
Bedford Ride, Bedford, Virginia
Connie Garber
York County Community Action Corp., Sanford, Maine
Valerhy Powers
Sedgwick County Dept. on Aging, Wichita, Kansas
Susan Healy Harmon
Gold Country Telecare, Nevada City, California
Dennis Horton
Mountain Empire Older Citizens, Big Stone Gap, Virginia
Karl Johanson
Council on Aging and Human Services (COAST), Washington
Lenna Kottke
Special Transit, Boulder, Colorado
Dave Marsh
Capital Area Rural Transportation System (CARTS), Austin, Texas
William McDonald
Medical Motor Service, Rochester, New York
Betty L. Newell
Community Association for Rural Transportation (CART), Harrisburg, Virginia
Dave O'Connell
Mason County Transit Authority, Shelton, Washington
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A Partnership Project of
the Beverly Foundation and the
Community Transportation Association of America

Located in Pasadena, CA, the Beverly Foundation is a 501(c)(3) nonprofit organization whose mission is to foster new ideas and options to enhance mobility and transportation for today's and tomorrow's older population.

Located in Washington, DC, the Community Transportation Association of America (CTAA) is a national nonprofit professional membership organization. Its mission is to make transportation available, affordable and accessible, particularly for those who cannot use conventional public transit services.

For more information about senior transportation innovations and options please visit the partners' websites.

www.ctaa.org

www.beverlyfoundation.org