





In communities across the United States—urban, suburban, and rural—coordination is seen as an avenue to better transportation services for seniors. The aging network has been a leader in implementing innovative coordinated transportation services. This report describes promising practices in 14 different communities where seniors have benefited from innovative efforts to coordinate transportation services. The report is intended to inspire and guide transportation practices in other communities as they try to improve the quality and cost effectiveness of their transportation services, and thus to improve the quality of the lives of their seniors and other residents. Quality transportation services are fundamental to supporting the Administration on Aging's (AoA) vision of independent, healthy, and engaged lives for seniors because such services support the development of comprehensive and coordinated systems of care for seniors.

## How We Developed This Report

The 14 communities showcased in this report provide valuable lessons for the aging network: they show how better transportation services for seniors resulted when various transportation programs were successfully coordinated. Communities where the aging network played a vital role in establishing and maintaining coordinated transportation services are emphasized, as are communities whose coordination efforts have not been fully documented in other reports. The communities were selected by consulting experts and from previous research. All of these communities demonstrate **replicable coordination strategies with significant measurable benefits.** 

### The Vital Role of Transportation in the Lives of Seniors

**Mobility is essential for independent living.** Transportation is the link that allows us to access our society's many rich but geographically dispersed activities.

Many seniors in America have concerns about their own transportation needs. Age-related changes to vision or physical and cognitive skills can challenge lifelong patterns of driving, walking, or transit use, but seniors still need to travel to lead independent and vital lives.

The typical problem for most communities is how to provide as much transportation as possible with very limited resources. When agencies work as partners with other agencies through strategic alliances—when they coordinate their efforts—they achieve much greater success in reducing duplication and inefficiencies, maximizing the results they can achieve from their limited resources, and providing large benefits to individual riders, their families, human service agencies, and communities.

Coordinated transportation programs serving seniors will be even more important in the future. In the next 30 years, there will be many more elderly persons living in the U.S., and the proportion of the elderly population to the general population will increase dramatically. **The rapid growth of our senior population means that we will need better transportation choices,** especially for the elderly of the future.

### Key Demographic Trends in Aging

The number of seniors is growing. Compared to the year 2000, by 2050 the number of people age 65 and over is projected to more than double, the number of people age 75 and over is projected to triple, and the number of people age 85 and over is projected to quintuple.

More of the population will be seniors. People 65 years of age and older were 13 percent of the population in the year 2000; they are projected to constitute 20 percent of the population in 2030.

The oldest age groups are growing fastest. In terms of numbers, the fastest-growing demographic group in the U.S. is people 85 years of age and older; their numbers are expected to double in the next 5 years. In

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percentage terms, the 75-and-over age group will show the greatest increase in terms of its proportion of the overall U.S. population.

**Life expectancy is increasing.** Average life expectancy has been increasing for more than 100 years. Life expectancy at birth is now 72.6 years for men and 79.3 years for women.

Average income levels for seniors are rising. Income and wealth of seniors is projected to increase in the next several decades, and the number of elderly poor is projected to decrease by more than 50 percent. But the future distribution of financial resources could be more unequal for seniors of the aging baby boom generation, especially for those who are poorly educated and do not have marketable labor force skills.

Health status is generally expected to improve, but there will be more seniors with disabilities. The elderly of the future will generally be in better health than today's elderly, but the longer life expectancy for seniors could create a 68-percent increase in the number of impaired elderly persons between 1990 and 2020.

Seniors are more often living alone. Thirty-one percent of the elderly now live alone. The number of older persons living with their spouses is expected to decrease slightly over time as life spans increase for both men and women.

# Transportation Implications of Demographic Trends

Projected increases in numbers and proportions of seniors mean that senior mobility and independence will be even greater concerns for society in the future. While some changes may be difficult to forecast, we can be certain that there will be real challenges in meeting at least some of the transportation needs of seniors of the future. In particular, the fact that the fastest-growing age cohort is the group of people age 85 and above has important policy and program implications: driving and the use of regular public transit now fall dramatically at or above age 85, and the prevalence of disabilities increases substantially among this group. These factors point strongly to the need for more mobility options for people age 85 and over, options that differ from driving and current public mass transit services.









Expected transportation implications of the projected demographic changes include:

- Seniors of the future are likely to travel more than seniors of today.
- There will be a greater emphasis on high-quality transportation services.
- More travel options will be needed, especially for seniors with mobility or income limitations.
- New transportation options will be needed in suburban and rural areas.
- Driving will still be the preferred means of travel for many seniors.

The combination of these factors is expected to pose substantial challenges for transportation providers. Coordination is one of the most effective strategies for addressing such challenges.

# What Is Coordination, Anyway?

Coordinating transportation services has been called "the best way to stretch scarce resources and improve mobility for everyone (Ohio Department of Transportation)." Coordination is a **technique for better resource management** in which improved organization strategies are applied to achieve greater cost-effectiveness in service delivery. Coordination means shared power, which involves shared responsibility, shared management, and shared funding. Coordination also means sharing the benefits that accrue from its application.

Coordination of transportation services is best seen as a **process for managing resources** in which organizations (that may not have worked together previously) interact to jointly accomplish their transportation objectives. Coordination is like many other political processes in that it involves power and control over resources, and it can be subject to the usual kinds of political problems and pressures, such as competing personalities and changing environments.

Coordination can improve transportation services by eliminating duplicative efforts and improving the efficiency of transportation operations. Coordinating transportation means doing better (obtaining more results, like trips) with existing resources. It requires that professionals in aging work together with persons from different agencies and backgrounds.

Recent Federal actions have substantially increased the ability of State and local stakeholders to coordinate transportation services that provide trips for seniors. For example, AoA and the Federal Transit Administration (FTA) have executed a Memorandum of Understanding, the White House has issued a Presidential Executive Order on coordinated transportation, FTA has released technical assistance materials supporting coordination efforts, and numerous Federal agencies are involved in the United We Ride program.

# Why Is Coordination Important to Programs on Aging?

From the very beginning, programs supported by the Older Americans Act have focused on a comprehensive approach to addressing the needs of seniors, requiring local partners to "develop at the substate or area level **systems of coordinated and comprehensive services** which will enable older persons to live in their own homes as long as possible." Coordination is seen as a particularly effective tool for leveraging the resources of other agencies for the benefit of seniors.

# What Are Coordination's Key Benefits?

When transportation resources are coordinated in a community, it is usually done with the expectation of positive outcomes. By working for greater efficiency in the use of transportation resources, coordination can **lower the costs of providing services.** Most communities apply these cost savings to expand services and increase the numbers of trips served, thus **increasing overall service effectiveness.** The combination of increased efficiency and increased effectiveness can create great improvements in unit costs, such as costs per trip.

The typical results of coordination are that it:

- Changes the structure of local transportation systems.
- Increases levels of transportation service integration.
- Improves transportation system performance measures.
- Creates a wide range of positive benefits, such as:
  - Increases in customer satisfaction.
  - Increases in community mobility.
  - Increases in the quality of life.









There definitely are "challenges" and "obstacles" to coordination but many studies have shown that there are no Federal legislative barriers that prohibit coordinating transportation services.

#### A Few More Comments About Coordination

Coordination is seldom easy. Expectations must be carefully managed: Coordinating transportation services may be more expensive, more difficult, and more time-consuming to achieve than most interested stakeholders initially expect. Although some agencies have hoped to see money returned to them, this has seldom happened because any cost savings realized are usually reinvested into meeting the many unmet travel needs found in most communities. Also, coordination agreements can unravel over time, so that constant work is necessary to ensure that all parties keep working together.

Because **coordination won't solve all transportation problems in all communities,** members of the aging network should recognize coordination as simply one of several possible management or problem-solving tools. Coordination is most effective where transportation efficiency can be improved. Where persons who need transportation are not being served but existing services are already highly efficient, coordination by itself is seldom an effective strategy. In these cases, additional resources are needed.

People have complained about "barriers to coordination" for many years. Some agencies and transportation operators have claimed that they would like to coordinate their services with others providers, but "barriers" in the legislation or regulations of programs through which they receive funding do not permit coordination. Because much of the funding for transportation services for seniors and other specialized client groups originates with Federal programs aimed at the unique needs of individual client groups, agencies receiving such funds need to pay close attention to the specific objectives and regulations of these programs. This can be a complex process, but it is certainly not an impossible one. There definitely are "challenges" and "obstacles" to coordination but many studies have shown that there are no Federal legislative barriers that prohibit coordinating transportation services.

# Coordination Activities at the Case Study Sites

In an effort to highlight how older adults benefit from innovative efforts to coordinate transportation services, AoA conducted case studies in 14 communities across the country. The initiative discovered that at most of the 14 sites, coordination activities are extensive and wide-ranging. They often involve multiple jurisdictions, funding sources, and transportation providers. Seniors often have a wide range of travel options, including public transit, taxis, specialized agency services, and volunteers. These members of the aging network are the leaders of coordinated transportation

activities in their communities, often serving as the key providers and brokers of trips for seniors and others. They are nearly always involved in wide-scale transportation planning efforts in their communities.

All of these activities have resulted in a wider range of travel opportunities that include trips at more times of the day and more days of the week to a wider range of destinations. Nearly all of this is accomplished at very modest costs to the riders. While activities that are innovative in some communities may be more often taken for granted in others, the wide range of accomplishments shown in Table 1 should serve as an inspiration to other members of the aging network who are concerned about how to improve transportation services for seniors.

The 14 case studies offer examples of coordinated transportation solutions from various locations around the country. They also offer significant variations in terms of service area size, types of communities served, service types and levels of service provided, annual budgets, funding sources, and coordination partners:

- Service Area Size. Service areas range from 25 square miles (Arlington County, VA) to more than 11,000 square miles (East Central IL Area Agency on Aging, Area IV AAA, Malheur County Transportation Service in OR) to 23,000 square miles (Council on Aging and Human Services Transportation's 9-county service area in eastern WA and western ID). Total service area populations range from 55,000 (Malheur County Transportation Service) to more than 1 million persons (SC Appalachian Council of Governments).
- Types of Communities Served. Many of the 14 cases serve a mix of urban, suburban, and rural areas. Arlington County, part of the Washington, DC inner suburban ring of communities, is the most highly urbanized. Systems serving communities like Monroe County, NY, and Wichita, KS, have more urban than rural riders; systems in eastern IN, ID, and VA's Shenandoah Valley serve more rural than urban riders. Council on Aging and Human Services Transportation, RIDES Mass Transit District, and Malheur County Transportation Service probably serve the most highly rural areas.
- Service Types. In most instances, the lead agency operates transportation services and also obtains trips for seniors through other agencies. The exception to this pattern is the Arlington Agency on Aging's Transportation Options, which provides information and referral services for seniors and serves as their advocate in dealings with provider agencies in their area. Some of the agencies serve as the coordinated dispatcher for their community, brokering rides through multiple nonprofit and for-profit providers (for example, Medical Motor Service). Many of the 14 agencies primarily use paid staff as drivers; Area IV AAA makes significant use of volunteers, and Partners In Care is solely a volunteer service, providing a high level of door-through-door personal assistance.
- Levels of Service Provided. Most of the 14 agencies participate in coordinated operations that offer most of their trips during the week. SC Appalachian Council of Governments, Medical Motor Service, Sedgwick County Transportation Brokerage, and East Central IL Area Agency on Aging offer services 7 days a week. Annual rides range from 2,400 (Partners In Care) to more than 750,000 (Medical Motor Service).





Community Service Organizations	Main Office	Roles, Activities, and Innovations	Area Agency Programs	Main Office	Roles, Activities, and Innovations
Community Association for Rural Transportation*	Harrisonburg,VA	Mobility resource and advocacy center for persons with specialized transportation needs and members of the general public in a largely rural region	Area IV AAA	Twin Falls, ID	Public transportation services in an 8-county rural region; uses volunteers and multiple modes
Council on Aging and Human Services Transportation	Colfax,WA	Provider/broker in 9 counties and 2 States; one of the most coordinated transportation services in the Nation; serves a very large rural area with wide funding support	Arlington Agency on Aging Transportation Options	Arlington, VA	Advocate/catalyst, information and referral center, funder, and provider of transportation services for seniors in a dense urban setting
Dakota Area Resources and Transportation for Seniors	West St. Paul, MN	Provides and brokers trips within Dakota County; programs include bus service, sharing rides, buses, drivers, and maintenance services for other providers in the county	East Central Illinois Area Agency on Aging	Bloomington, IL	Funds, plans, and provides transportation services in 16 counties with diverse geography and population
Medical Motor Service	Rochester, NY	Provides and brokers specialized transportation services to seniors and persons with disabilities using a wide variety of public and private funding sources	Malheur County Transportation Service	Ontario, OR	Sole provider of public transportation services in a large rural area; coordinates dispatching for State volunteer drivers
Partners In Care	Severna Park, MD	Provides door-through-door transportation services to passengers in need of special care; uses a formal service exchange program that enhances community interaction and decreases social isolation	The New InterUrban Rural Public Transportation System	Yorktown, IN	Provides and contracts for rural public transportation services in rural portions of 7 counties; connects to the major local urban transit system
RIDES Mass Transit District	Harrisburg, IL	Provides highly coordinated public transportation services in a large rural area en-compassing 9 counties in southeastern IL	Sedgwick County Transportation Brokerage	Wichita, KS	Administers a 3-county coordinated transit district; provides some trips and brokers others through a wide range of vendors; multiple trip types offered at a wide range of costs
St. Johns County Council on Aging	St. Augustine, FL	Enlightened PR approach to customer, worker, and community satisfaction: applies advanced technologies, serves multiple rider types including the general public, offers hands-on service, and uses a hospitality focus	South Carolina Appalachian Council of Governments	Greenville, SC	Brokers and contracts for transportation in a 6-county region and serves as the information and referral center; 7-day/week service is offered

Table 1: Promising Practices in Coordinated Transportation Services Major Activities and Innovations in the Local Communities

<sup>\*</sup> One of the case studies discusses an innovative program called Community Association for Rural Transportation, no longer in operation as of the date of this publication.

- Annual Budgets. Annual transportation expenditures range from \$100,000 (Partners In Care) to around \$3 million (RIDES Mass Transit District and Dakota Area Resources and Transportation for Seniors).
- Funding Sources. The agencies use a wide variety of funding sources to pay for the coordinated transportation services in their communities. As members of the aging network, all 14 agencies use Title III Older Americans Act funds from the AoA, although this is not the major funding source for many agencies. Eleven of the 14 agencies reported receiving funding from the localities that they serve; Council on Aging and Human Services Transportation and Sedgwick County Transportation Brokerage reported receiving funding through local property taxes, which is an extremely stable revenue source. Eight agencies receive Medicaid funds for transporting Medicaid eligible clients, and 8 agencies were using Section 5311 rural public transportation funds that originate from the FTA. Contracts with local human service agencies provided funding at 7 of the 14 sites, and a variety of other local funding sources were used at 6 sites. Other State and Federal programs funded fewer of these agencies.
- Coordination Partners. Some of the agencies that cover very large geographic areas (Council on Aging and Human Services Transportation, East Central IL Area Agency on Aging, and RIDES Mass Transit District, for example) coordinate with very large numbers of Federal, State, and local agencies. City and county governments are the most frequent partners (10 instances). A variety of other local partners, including public transit authorities, is next (nine cases of coordination). In six cases, aging network members coordinate with regional planners or services providers, local mental health institutions, local agencies serving persons with disabilities, and local volunteer groups.

#### Beneficial Outcomes of Coordination

Contacts at the 14 sites believed most frequently that their coordination activities had increased the cost-effectiveness of local transportation services and enhanced community mobility. Increases in quality of life and customer satisfaction were the next most frequently mentioned outcomes of coordinating transportation services for seniors. The local contacts reported the following:

- Positive changes to transportation services, including increases in the days and hours of service, and more connections with outlying rural areas and communities where no previous transportation services existed.
- Increases in efficiency, effectiveness, and cost effectiveness through ride sharing, centralized dispatching, brokering trips using multiple providers, two-way communications with drivers, joint scheduling of appointments with medical and other service providers, and volunteer reimbursement.
- Increases in customer satisfaction that are monitored through rider surveys and customer service lines.
- Enhanced community mobility, evidenced by strong ridership growth, especially for persons with mobility limitations, achieved through door-through-door services, more long-distance trips, and formal transfer and ridesharing arrangements with other transportation providers.





Coordination increased the cost-effectiveness of transportation and enhanced community mobility.





Planning activities, working together, and putting customers first were the coordination techniques most often employed.

• Increases in the quality of life for seniors and others served by coordinated transportation operations by decreasing their dependence on family and friends for rides, increasing their abilities to continue independent lives in their own homes, increasing overall health status through improved access to primary medical care, and increasing social interaction and reducing social isolation.

### Techniques Used to Achieve These Benefits

Local contacts were asked how they make coordination work, with a focus on working together, planning, putting customers first, adapting funding, and moving people efficiently. Members of the aging network were highly engaged in all of these activities in 3 of the 14 sites; all 14 sites put at least some effort into all 5 strategies. Planning activities, working together, and putting customers first were the coordination techniques most often employed. Six of the 14 agencies considered working together to be their most significant coordination activity.

- Working together: Some of the agencies that cover very large geographic areas (Council on Aging and Human Services Transportation, East Central IL Area Agency on Aging, and RIDES Mass Transit District, for example) coordinate with very large numbers of Federal, State, and local agencies. City and county governments are the most frequent partners for coordinated transportation services for seniors, with 10 instances in which local governments have been involved. Other local partners, including public transit authorities, were the next most frequent coordination partners with nine cases. Important and unusual partners included foundations, faith-based groups, Greyhound, local businesses (such as grocery chains or pharmacies), Metropolitan Planning Organizations, welfare-to-work programs, and the State public transit association.
- Planning: Coordinated planning activities included the creation of transportation plans, the development of shared client databases, inventories of local transportation resources, focus groups and planning conferences, one-on-one agency meetings on transportation issues and needs, needs assessment studies, and Geographic Information Systems including riders and their common destinations.
- Putting customers first: Techniques for offering high-quality customer service included hands-on assistance and door-through-door service, emphasizing customer satisfaction, free rides for escorts, multiple payment options, sensitivity training for staff, public information through newsletters, public service announcements, Web sites, customer information in multiple languages, "reminder phone calls" on the day of the ride, special attention paid to first-time riders, fare subsidies, and focus groups and surveys to monitor services and customer satisfaction.
- Adapting funding: The lead agencies use a wide variety of funding sources to pay for the coordinated transportation services in their communities:
  - Title III Older Americans Act funds from the Administration on Aging (all 14 agencies).
  - Funding from the localities served (11 agencies) and local property tax revenues (2 agencies).

- Medicaid funds for transporting Medicaid-eligible clients (8 agencies).
- Section 5311 rural public transportation funds (8 agencies).
- Contracts with local human service agencies (7 agencies).
- Various other local funding sources (6 sites).

Other State and Federal programs funded fewer agencies. Unusual funding strategies included trip subsidies from grocery stores, barter services for the use of vehicles, Greyhound ticket agent commissions, and Community Development Block Grant funding. State tax credits encourage private donations to the Community Association for Rural Transportation, Inc.

Moving people efficiently: Activities in this category include ride sharing, central dispatching, mixing client types
on vehicles, brokering trips through multiple providers including public transit agencies and private taxis, centralizing
key functions like maintenance and driver training, and using volunteers for long-distance and time-intensive trips.

# Opportunities and Challenges

While coordinated transportation services offer many benefits, few communities have captured all of the possible benefits, meaning that additional positive outcomes are possible in many localities. Coordination also requires real work, and transportation providers and planners in the aging network often face a number of challenges in their efforts to provide better transportation services for seniors. Such issues are not unique to the 14 case study communities, but the strategies the case study communities adopted for addressing these opportunities and challenges should be useful throughout the aging network.

Case study contacts identified the following opportunities and challenges as important current issues for them:

- Bringing more local agencies into coordination activities: Some potential coordination partners still hold back because of misperceptions about costs and service levels. RIDES Mass Transit District continues to recruit such agencies; Community Association for Rural Transportation has found ways to use established agencies as transportation providers.
- Obtaining benefits from new technologies: Computerized dispatching software provides significant help with ride sharing as well as cost allocation and billing for Council on Aging and Human Services Transportation, The New InterUrban Rural Public Transportation System, and others.
- Ensuring the most effective use of volunteers: Volunteer drivers and escorts can be particularly cost-effective for long-distance and time-intensive trips. Volunteers need careful recruitment, training, and recognition; Partners In Care has developed useful techniques.

Volunteer drivers and escorts can be particularly cost effective for long-distance and time-intensive trips.









Seniors using AoAsponsored services tell us:

- "It gives me the freedom to come and go for myself."
- "I depend on this bus now that my husband went to heaven."
- "This is what keeps me out of that nursing home."
- "It's like letting a bird out of a cage."

- Obtaining additional funding: Rising operating and maintenance costs, gasoline prices, and liability insurance are creating challenges for many agencies that offer trips to seniors. Local government support, particularly that provided by dedicated tax revenues, can be extremely valuable (as they are to Council on Aging and Human Services Transportation and Sedgwick County Transportation Brokerage). Because coordination creates real improvements in the cost-effectiveness of transportation services, members of the aging network in these case studies were able to tap funding sources that were previously unavailable to them, such as Federal and State transit funds (St. Johns County Council on Aging, and The New InterUrban Rural Public Transportation System), foundation grants and local businesses (Partners In Care), and local human service agencies (all 14 agencies) by fully documenting the increased cost-effectiveness of their coordinated transportation services.
- Increasing service levels and quality: In many communities, the local transportation programs don't offer same-day service now, and riders need to make reservations at least 24 hours in advance. Local advocates for seniors like their riders to have the option of same day service. Additional funding will be needed to effect such changes.
- Offering long-distance trips: Long-distance trips are a challenge for many agencies because of the time and resource costs involved. In MD, Partners In Care has instituted a special mileage reimbursement program for the volunteers who will take riders on long-distance trips.

### Transportation Needs and Options

Because seniors differ so much in their transportation needs and other characteristics, no single solution can meet all mobility needs of all seniors; a wide range of services and systems will be necessary. The majority of seniors will drive, ride with others, walk, or use transit; they can do so with a high degree of independence concerning origins, destinations, and travel times. Seniors with some limitations will need more personalized services, such as taxis or paratransit services, and will face some travel limitations due to factors such as the costs, schedules, or eligibility requirements of these services. The most frail and least independent seniors will need substantial assistance with their travel needs, including escorts or personal assistants (who might be paid professionals or volunteers) or even medically trained personnel. Figure 1 illustrates the convergence of needs and services for transporting older travelers.

Communities that support all modes of travel in the full range of public and private transportation options, often referred to as the "family of services" approach to transportation, will offer the greatest level of mobility to all their citizens, including their seniors. A community that manages all of these transportation options on a comprehensive and coordinated basis can offer truly cost-effective mobility services for all its residents.

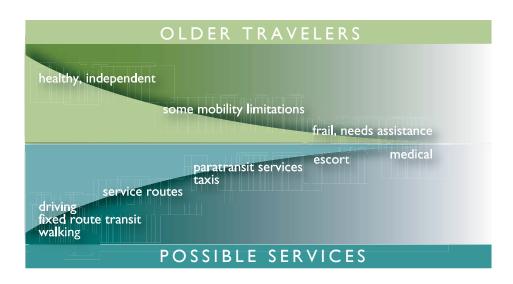


Figure 1: Transportation Options and the Needs of Individual Travelers

Mobility is vital because of the opportunities that it unlocks. Seniors unable to provide their own transportation often face extremely limited lives. Persons with serious transportation problems have much smaller ranges of economic and social opportunities. They are more likely to be isolated, seldom participating in their communities. They are less

likely to continue to live independently in their own homes. AoA-sponsored transportation services have broken this pattern of dependency and isolation, and have led to dramatic improvements in mobility and life satisfaction for the seniors who use such services.

## Summary

Coordinated transportation services offer many benefits in typical communities. This report shows how to make coordination succeed and thus enhance transportation services for seniors. Key lessons from this study for members of the aging community who are interested in better transportation services for seniors include the following:

- Tailor the services to your community.
- Use AoA funds to leverage many other funding sources.
- Actively and continually engage other partners and stakeholders.
- Ride sharing is the key to cost-effectiveness.
- Use multiple kinds of agreements and arrangements as appropriate.





These cases once again confirmed productive strategies learned from other case studies of successful coordinated transportation services. Some of the most important of these other strategies, which can be seen as common-sense approaches to enlightened management, are shown below:

- Adopt flexible approaches to services and partnerships.
- Meet diverse needs by offering a wide spectrum of services.
- Offer products and services of true value.
- Build realistic expectations about coordination outcomes.
- Collect detailed fiscal, operating, and client data.
- Make sure coordinated services are run with close attention to costs and revenues.
- Keep all stakeholders up to date about the benefits realized through coordination.
- Listen intently to both riders and partners.

Seniors need mobility for their independence and freedom. Providing increased mobility is likely to lower the overall social costs of caring for older persons. Coordination offers one means of obtaining increased mobility by maximizing the productivity of limited resources. Coordination isn't always easy, and it does require real work, but the 14 cases highlighted here show that coordinating transportation services can be a highly effective strategy in improving the mobility of seniors and others, thus increasing their capabilities for active, connected, independent, and vital lives.





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