



## Travel Training for Older Adults Part II: Research Report and Case Studies

### DETAILS

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0 pages | 8.5 x 11 | PAPERBACK

ISBN 978-0-309-30794-9 | DOI 10.17226/22298

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**TRANSIT COOPERATIVE RESEARCH PROGRAM**

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**TCRP REPORT 168**

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**Travel Training for Older Adults  
Part II: Research Report  
and Case Studies**

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*Subject Areas*

Public Transportation • Passenger Transportation • Safety and Human Factors

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Research sponsored by the Federal Transit Administration in cooperation with the Transit Development Corporation

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**TRANSPORTATION RESEARCH BOARD**

WASHINGTON, D.C.  
2014  
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## TRANSIT COOPERATIVE RESEARCH PROGRAM

The nation's growth and the need to meet mobility, environmental, and energy objectives place demands on public transit systems. Current systems, some of which are old and in need of upgrading, must expand service area, increase service frequency, and improve efficiency to serve these demands. Research is necessary to solve operating problems, to adapt appropriate new technologies from other industries, and to introduce innovations into the transit industry. The Transit Cooperative Research Program (TCRP) serves as one of the principal means by which the transit industry can develop innovative near-term solutions to meet demands placed on it.

The need for TCRP was originally identified in *TRB Special Report 213—Research for Public Transit: New Directions*, published in 1987 and based on a study sponsored by the Urban Mass Transportation Administration—now the Federal Transit Administration (FTA). A report by the American Public Transportation Association (APTA), *Transportation 2000*, also recognized the need for local, problem-solving research. TCRP, modeled after the longstanding and successful National Cooperative Highway Research Program, undertakes research and other technical activities in response to the needs of transit service providers. The scope of TCRP includes a variety of transit research fields including planning, service configuration, equipment, facilities, operations, human resources, maintenance, policy, and administrative practices.

TCRP was established under FTA sponsorship in July 1992. Proposed by the U.S. Department of Transportation, TCRP was authorized as part of the Intermodal Surface Transportation Efficiency Act of 1991 (ISTEA). On May 13, 1992, a memorandum agreement outlining TCRP operating procedures was executed by the three cooperating organizations: FTA, the National Academies, acting through the Transportation Research Board (TRB); and the Transit Development Corporation, Inc. (TDC), a nonprofit educational and research organization established by APTA. TDC is responsible for forming the independent governing board, designated as the TCRP Oversight and Project Selection (TOPS) Committee.

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The TCRP provides a forum where transit agencies can cooperatively address common operational problems. The TCRP results support and complement other ongoing transit research and training programs.

## TCRP REPORT 168, PART II

Project B-41

ISSN 1073-4872

ISBN 978-0-309-30795-6

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Transportation Research Board  
Business Office  
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# FOREWORD

By Lawrence D. Goldstein

Staff Officer

Transportation Research Board

*TCRP Report 168: Travel Training for Older Adults* presents a comprehensive roadmap for how to help make travel training meet the mobility needs of older persons. The report includes an executive summary, a detailed Handbook, and a supplemental research report. The Handbook, Part I, provides an extensive set of guidelines for transit agencies and human services providers on how to build and implement training programs to help older adults who are able to use fixed route public transit. The supplemental research report, Part II, reviews the research plan that produced this report as well as the case studies used to formulate the overall strategic program.

The Handbook addresses the primary components of an effective travel training program. It defines the target market for travel training; identifies incentives and barriers to participation in training programs and subsequent use of conventional public transit; presents effective marketing and outreach strategies; describes opportunities and techniques for customized training; identifies and describes methods to monitor outcomes, refine techniques, and sustain ridership; and outlines how to address cost-effectiveness from the perspective of the provider as well as the recipient of training efforts. The Handbook focuses on practical implementation, drawing on experience from programs currently in use throughout the country.

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Travel training for older adults has become more common because it encourages greater ridership using conventional public transit services, and because transferring ridership from paratransit to conventional public transit can potentially decrease overall transit system operating costs. At the same time, there is interest in improving the quality of life of older adults—expanding opportunities for increased mobility and continued independence for those not otherwise constrained by physical or cognitive disabilities.

To meet these growing demands, transit operators need better information to understand how effective travel training can increase ridership, which older adults are likely to benefit from travel training, what barriers have to be overcome, and what elements of travel training programs are linked to greater success among different groups of older adults. This information should be useful to professionals engaged in the practice of travel training as well as other individuals interested in increasing the mobility of older persons, and it should also be of keen interest to older persons and persons with disabilities who are interested in learning more about how public transportation can meet their travel needs when and where possible.

The Handbook is built on experience gleaned from seven detailed case studies and 13 additional studies examined in a broader context. It describes key issues that should frame a training program, how to improve current travel training practices, potential obstacles,

and how to overcome those obstacles. As described, the fundamentals of any travel training program must address how to reach out to affected communities to draw users in, as well as how to identify and present benefits as well as costs of training in support of program implementation.

The transit industry and local jurisdictions can use the resources provided in this report to initiate or improve travel training programs for older persons as well as persons with disabilities. The Handbook and supplemental research report highlight best practices by leaders in the travel training field and provide suggestions for improving travel training practices. Various training practices are discussed in depth, and factors for success are enumerated. In particular, practitioners should focus their attention on key features of successful programs as presented in the report, and they should understand the challenges that such programs typically face.

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## CHAPTER 1

# Introduction to Travel Training

### The Promise of Travel Training

Travel training offers the promise of improving the mobility of older adults while also helping public transit agencies control their costs. It has been called “one of the most effective and long-lasting techniques” for achieving these goals (Koffman et al., 2011). Travel training programs are said to be in place in about 55% of transit agencies (Chia, 2008).

The importance of travel training’s promise stems from life in our automobile-oriented society where many citizens are not familiar with the benefits of traveling by public transportation or with the procedures and requirements for using public transit services. Real or perceived barriers to using public transit may be reducing the mobility and the quality of life for older adults who are facing age-related issues that interfere with independent travel. At the same time, many public transit agencies are facing severe resource constraints and need assistance in increasing the cost effectiveness of their services. Therefore, travel training can assist in achieving the following objectives:

- Increasing independent mobility and trip-making.
- Improved travel attributes: time, cost, connections.
- Increasing use of fixed route transit services.
- Saving money for service recipients and transit agencies by promoting lower cost alternatives to supplement Americans with Disabilities Act (ADA) paratransit.
- Improved quality of life for participants.

### Outcomes for Older Adults

Training older adults in the skills needed to travel safely and independently using public transportation services, particularly fixed route services, has the potential to maintain or even increase the mobility of those older adults. Seniors need access to a wide range of mobility options responsive to individual needs to ensure their access to health care,

social activities, and other key activities of daily living. When such responsive transportation services exist, older adults can comfortably age in place in their current homes, the living arrangement preferred by the vast majority of older adults. To be sure, travel training for fixed route public transportation is not “the only answer” for all older persons and all communities, but it certainly seems to be a potent tool (one that seems now to be somewhat underutilized) in the arsenal of strategies for improving or at least maintaining the mobility of older adults.

These training programs can be especially effective for older adults who may face diminishing driving skills but still need or desire independent access to the resources of their broader communities. Age-related impediments to independent travel can include items such as reduced income, reduced health, diminution of the physical, perceptual, or cognitive skills required for driving, loss of the driver in the household, or a number of other life changes that typically occur during the aging process and could interfere with mobility. Travel training can address and often ameliorate these impediments to independent travel.

### Outcomes for Transit Agencies

Existing travel training programs also show promise for being effective tools for decreasing the costs of public transit programs. Travel training programs have been promoted as potentially effective at constraining the growth of costs of ADA paratransit services, which are the most expensive form of service offered by public transit agencies. If older adults can learn to recognize fixed route public transit services as more attractive than the paratransit services that focus on persons with disabilities, the growth of paratransit services can be tempered. With a rapidly growing proportion of our population now classified as older adults (generally taken to mean persons 65 years of age and older)—and with significant constraints on funding for many public services, including

public transit—travel training for older adults could have a significant impact on transit ridership and transit finances.

The results of this project provide workable techniques for increasing the mobility of older adults through travel training programs. This is an extremely important objective precisely because a significant decline in mobility can severely decrease an older person's quality of life: fewer out-of-home activities, increases in health and nutrition problems, isolation, and depression are some of the specific issues often resulting from a significant decline in mobility.

### **From Identified Needs to Results— A Theory of Change and a Logic Model for Travel Training**

Older adults are interested in improving their mobility; public transit agencies are interested in controlling their costs. The fundamental premise of travel training is that education and training can change people's behavior and improve their lives by providing information and skills to increase travel options for older adults. Along the way, this process can support and help change the transportation services that serve the needs of this population.

Figure 1-1 provides a graphic illustration of the theory of how changes occur for individuals and transportation providers as a result of travel training. Through outreach to their partners and potential consumers, travel training programs find candidates for training. Training events can include presentations and orientations about transit and other travel options, group training sessions, or one-on-one training. Figure 1-1 shows the sequences of the next events for consumers and transportation providers, respectively. An immediate result of travel training is that consumers have a much better idea of what travel options might usefully address their travel needs. This knowledge combined with skill-based and situational training should lead to changes in their travel behavior (trip modes, trip frequency, destinations, etc.), which in turn results in improved travel options, more immediate services, lower per trip costs, and other improved travel attributes. The improved travel options will ultimately lead to improved quality of life for older adults, meaning greater mobility, more aging in place, and greater life satisfaction.

Figure 1-1 also shows the anticipated changes that travel training can generate for transportation providers. An immediate result of travel training efforts is often a better understanding of the travel needs of older adults. This may result in changes in services offered; a typical result is a greater focus on fixed route services by older adults. Note the connections diagrammed between changes in the travel behavior of consumers and the changes in services offered by transportation providers. These changes reinforce each other and can lead to further mutually beneficial outcomes including

changes in travel behavior for older consumers that can result in improved financial conditions for transit providers (e.g., more fixed route revenue, fewer or less rapidly growing ADA paratransit expenses); changes in services offered by transit providers can in turn lead to improved travel options for older consumers. The improved financial conditions for transit providers can eventually lead to an improvement in the number, frequency, and quality of transportation services that they offer or, alternatively, may be able to help offset cutbacks in public financial support for transit services.

While Figure 1-1 provides a theory of change, Figure 1-2 presents a more specific travel training logic model for these changes that traces the connections between inputs, activities, outputs, outcomes, results, and system changes. This logic model can be useful for travel training program managers and others interested in quality of life improvements for older adults. The purpose of this logic model is to illustrate detailed relationships between travel training activities and their desired outcomes.

The **inputs** to a travel training program include resources, outside supports, mission, guidelines, and standards. The components of each of these are listed in Figure 1-2. **Activities** that a travel training program will need to undertake are listed, from initial data collection through staff training to presenting the training and evaluating its results. Activities produce **outputs, outcomes, and other longer-term changes**. There are key outcomes for consumers and for transportation providers. For consumers, better understanding of transit services and enhanced travel skills lead to results such as greater use of fixed route transit, less use of ADA paratransit, greater use of other travel modes, and reduced travel time and costs. For transportation providers, travel training can lead to better understanding of the travel needs of older adults, which in turn should lead to improved travel training programs and can eventually lead to transportation system improvements. Long-term system changes for older adults can include more aging in place, which often leads to fewer nursing home placements, greater quality of life, and reduced burdens on caregivers. For transportation providers, changed travel behavior of older adults can result in increased income and cost savings, and these changes can lead to increased financial stability and the possibility of improved transportation services.

While these sequences of changes are possible, none of these changes are guaranteed in all communities. Implementation of travel training may be influenced by factors outside the control of travel training programs, including the quality and extent of local transportation services, weather and terrain, and local community support for public transportation. Some individuals are more likely to benefit from travel training than others. Factors such as national economic health and local employment trends may influence the extent to which

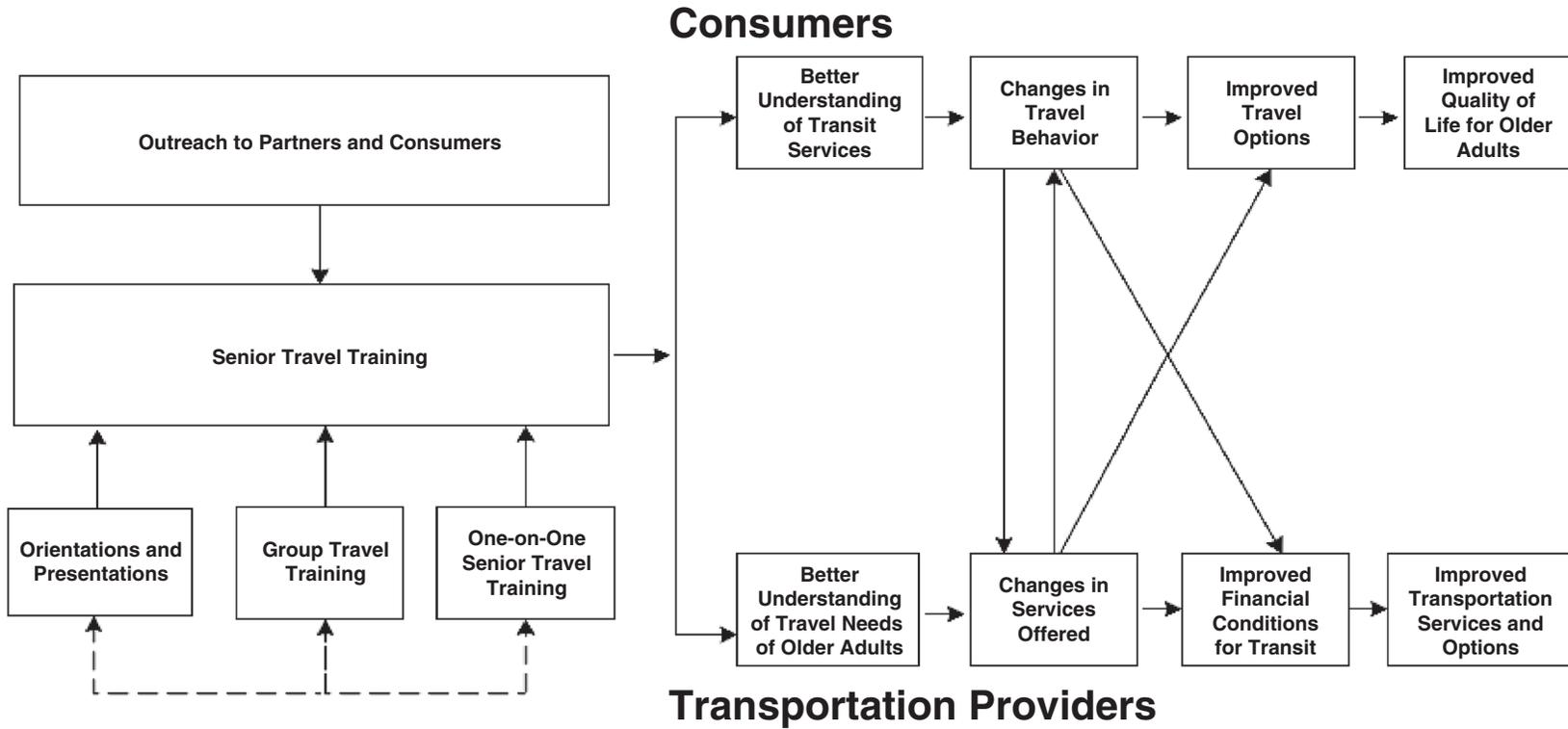


Figure 1-1. Travel training for older adults theory of change.

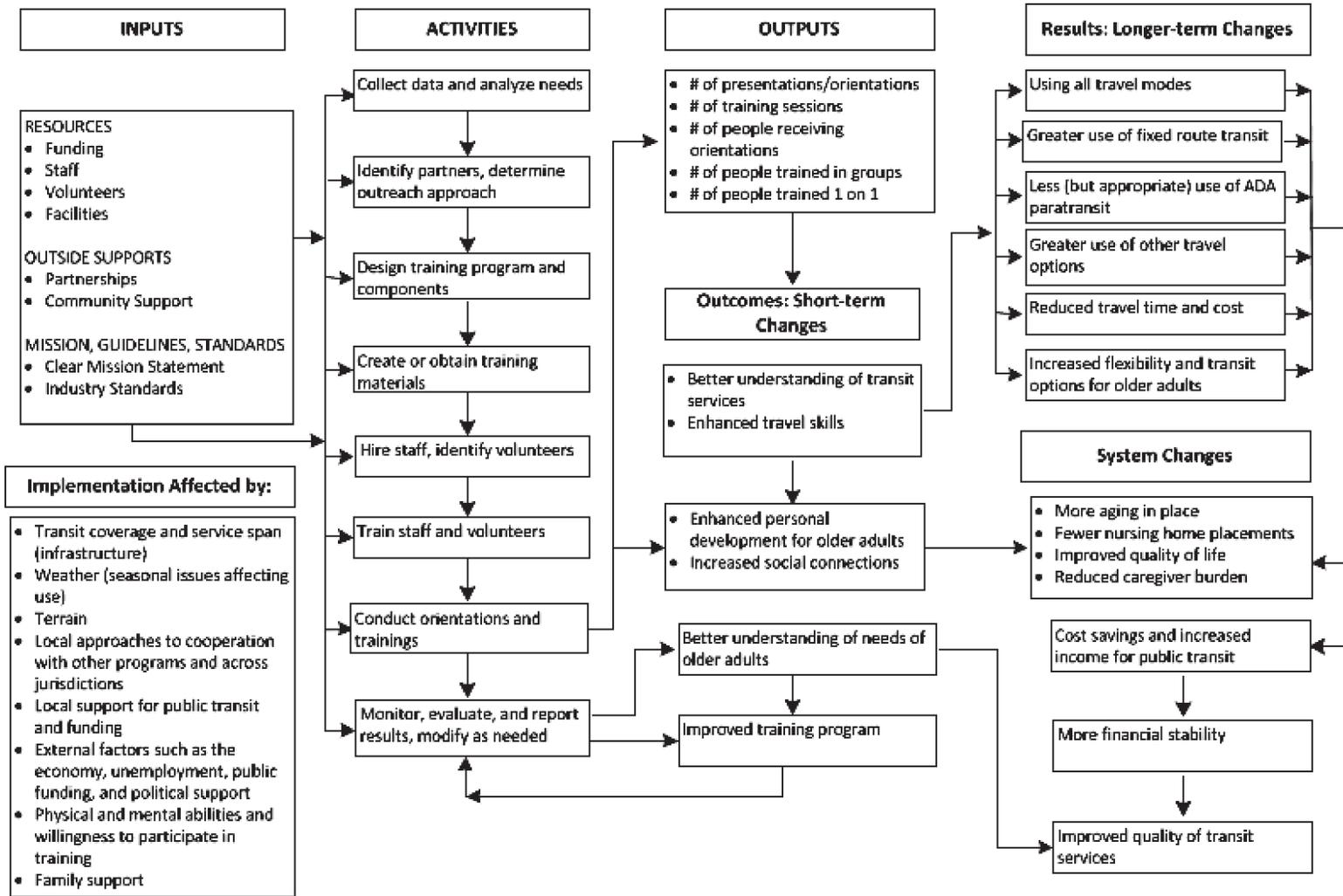


Figure 1-2. Travel training for older adults logic model.

older adults are inclined to use public transit. That said, travel training has great potential to offer significant benefits to older adults, transportation providers, the caregivers of older adults, and local communities.

## Key Issues in Travel Training

There are many issues that could be described as key concerns regarding how travel training programs can enhance the mobility of older adults. Some of the most obvious of these include the following issues.

- The prospect of greatly increased numbers of older adults in the near future:
  - Some of whom will need some assistance in fulfilling their mobility needs.
  - Some of whom have little or no experience with using fixed route transit services.
  - Some of whom will live outside public transit service areas or will not be appropriate candidates for fixed route ridership for other valid reasons.
- An increasingly uncertain future for public transportation funding, combined with the rapidly rising costs of paratransit services in absolute terms and also as a percentage of expenditures by public transportation systems:
  - Can some of the older adults who could conceivably qualify for paratransit services better satisfy their travel needs using fixed route transit?
  - Is it accurate to assume that their travel needs can be accommodated on fixed route services at essentially zero marginal costs?
- A serious lack of understanding about which travel training programs are successful and why they are successful:
  - Which programs work and why?
  - How can that information be applied to public transportation systems and communities of all sizes and features?
- Dissemination of best practices:
  - Certain transit properties have made significant strides in providing travel training services to older adults; they can serve as respected peer examples for the improvements sought by other transit operators. (See the Appendix for relevant contact information).

## Demographic Projections

Societies around the world are aging. Estimates from the United Nations (2009) show that the global proportion of people age 60 and older is expected to be about 22% in 2050, which will be double the percentage in 2009. In developed countries, projections estimate that about one-third of the population could be age 60 and older by 2050.

In the United States, the number of people 65 years of age and older is projected to increase significantly: in 2000, there were 32.6 million persons 65 and older; in 2010, there were 40.3 million (U.S. Census Bureau, 2012) or about 13% of the population. Projections suggest that there will be about 72 million people 65 years of age and older in 2030 and more than 88.5 million in 2050 or more than 20% of the population (U.S. Census Bureau, 2012). The “oldest old,” those aged 85 and over, are the most rapidly growing elderly age group. The oldest old numbered 3 million in 1994, making them 10% of the elderly and just over 1% of the total population. Because of the baby boom generation, it is expected that the oldest old will number 19 million in 2050. That would make them 24% of elderly Americans and 5% of all Americans.

This aging of the population will have profound impacts on society, particularly on transportation, mobility, and quality of life. It is well known that as people age, they may experience declines in their psychomotor, perceptual, and cognitive abilities as a result of age-related medical conditions, the medications used to treat these conditions, and/or the normal process of aging (Eby, Molnar, and Kartje, 2009). Declines in these functional abilities can make driving more difficult and less safe.

Many societies are oriented toward the use of automobiles by people of all ages, including older adults, for satisfying their mobility needs. In the United States and many other countries, personal transportation is closely linked to the automobile due, in part, to suburbanization, changing family structures, increased vehicle affordability and availability, and a lack of alternative transportation (Kostyniuk, Shope, and Molnar, 2000; McGuckin and Srinivasan, 2003). Even in areas where non-driving transportation services are available, older adults generally do not utilize the services (Eby et al., 2011). Many older adults are not familiar with the benefits of traveling by public transportation or with the procedures and requirements for using fixed route public transit services (Babka, Zheng, Cooper, and Ragland, 2008; Burkhardt, McGavock, and Nelson, 2002; Ling and Murray, 2010; Tuokko, McGee, Stepianiuk, and Benner, 2007; Wolf-Branigin, Wolf-Branigin, Culver, and Welch, 2012). Training older people to use transit services—called travel training—has the potential to help older adults who cannot or choose not to drive maintain mobility and quality of life (Burkhardt, McGavock, and Nelson, 2002; Hardin, 2005).

While older adults of the future may be more highly educated, healthier, and more active, there may also be a greater number of older persons who have mobility or income limitations. Most members of forthcoming older generations will own automobiles and will have been automobile drivers for most of their lives, including many of their years after age 65. In fact, many older people tenaciously hold onto their automobile driving, and some do so even in face of decreasing

driving abilities and increasing risk of crashes, injuries, and fatalities. The next generation of older adults is also more likely to be living in suburban rather than urban or rural areas; this expected spatial distribution of residences and trip destinations is likely to pose a significant challenge for public transit providers.

While most older adults currently travel much more often by car than by public transportation, their usage of public transit is growing, and older adults are now choosing public transportation for a greater proportion of their trips. As could be expected, older non-drivers use public transportation more than older drivers. Recent national surveys have also shown very low usage by older persons of other alternative modes, such as taxis and human services transportation. This indicates a real possibility for public transit to play a significant role in future travel patterns of older adults.

### Trends in Public Transportation Funding

Public transit agencies are currently faced with rising costs, difficulties with acquiring and maintaining funding, and increasing demand for expensive paratransit services required by the Americans with Disabilities Act (ADA). Among many other provisions, the ADA requires that paratransit programs ensure that ADA-eligible residents who cannot get to a bus stop or cannot use the fixed route transit system still have some means of getting to and from their daily tasks. Many public transit agencies are finding it difficult to provide paratransit services in a cost-effective manner.

As public transit agencies search for ways to provide transportation to all customers, travel training has the potential to save agency costs by encouraging individuals with ADA paratransit certifications to use fixed route transit or other transportation options for at least some of their travel needs. In recent years, costs to public transit agencies for providing ADA complementary paratransit services have risen faster than the costs of providing fixed route transportation, especially for some smaller transit agencies. ADA paratransit services account for a small portion of transit rides, while fixed route trips account for the vast majority of trips provided by public transit. According to a national survey of transit agencies conducted by the U.S. Government Accountability Office (GAO) (2012), the average number of ADA paratransit trips provided by a transit agency increased by 7% from 2007 to 2010, and the average cost of providing an ADA paratransit trip increased by 10% during that time period. Furthermore, GAO reported that ADA paratransit trips are more costly to provide than fixed route trips: the average paratransit trip costs \$29.30, and the average fixed route trip costs \$8.15. This situation has led transit agencies to undertake various efforts, including travel training, to ensure that potential paratransit riders understand the benefits of riding fixed route transit.

#### Transit Agency Concerns about ADA Paratransit Costs

- A typical ADA paratransit trip can cost from three to ten times as much as a typical fixed route transit trip.
- Costs for ADA paratransit services are growing faster than are costs for fixed route services.
- ADA paratransit trips are often less than 1% of a transit agency's rides but can consume more than 5% of its total expenses.
- The demand for ADA paratransit trips could increase substantially in the future.

Also, transit agencies are currently concerned about the future stability of funding sources that have traditionally supported public transportation. In July of 2012, Congress passed legislation to fund surface transportation for 2 years: entitled "Moving Ahead for Progress for the 21st Century" (MAP-21). This legislation provided \$105 billion for the following 2 years to fund road repairs, mass transit, and other critical repair and expansion projects. The problem with that legislation was that the revenues for transportation have not matched the transportation need and are falling behind. MAP-21 did not address the problem that, for the past several years, gasoline, diesel, and other federal taxes and revenues were insufficient to cover the expenditures of the Highway Trust Fund, which helps fund public transportation. This deficiency required the diversion of general fund revenues to transportation spending. Unless new funding sources can be agreed upon, federal transportation funding could be cut. Automatic federal spending cuts associated with deficit reduction include significant cuts to transportation programs.

Another issue with the MAP-21 legislation is that it eliminated two of the Federal Transit Administration's programs that have been instrumental in funding travel training programs: the Section 5317 New Freedom program and the Section 5316 Job Access and Reverse Commute (JARC) program. The kinds of activities that these programs supported have been included in an expanded Section 5310 program, which is now called Formula Grants for the Enhanced Mobility of Seniors and Individuals with Disabilities. The initial FY 2013 authorization for the expanded Section 5310 program is more than 30% less than the combined FY 2012 appropriations for the Sections 5310, 5316, and 5317 programs.

At the state and local levels, sales tax and property tax revenues used by transit providers to leverage other funding sources have been adversely affected by recent economic conditions. All of these factors create substantial pressures on

public transportation providers to operate in the most cost-effective manner, and travel training has become one of the tools used to control costs and enhance ridership.

## Research Objectives

The objective of this research was to prepare a handbook for transit agencies and human services providers on how to create, implement, sustain, and evaluate travel training programs for older adults able to use conventional public transit. The first part of this project is *TCRP Report 168: Travel Training for Older Adults, Part I: A Handbook*. The chapters of the Handbook provide basic information that all persons involved in travel training for seniors should know and apply. The second part of this project is *TCRP Report 168: Travel Training for Older Adults, Part II: Research Report and Case Studies*. It provides basic information about travel training programs and the research activities that were used to develop the findings and recommendations in the Handbook. *TCRP Report 168: Travel Training for Older Adults, Executive Summary* provides an overview of the materials in the Handbook and some of the materials in the research report. The executive summary should be useful to explain the basic features of travel training and to interest important individuals in obtaining the full results of the study to apply in their local communities.

Because of the lack of a formal travel training program in many jurisdictions and the wide variety of teaching methods and target audiences in the programs that do exist, there appears to be a pressing need for a handbook on how to create, implement, sustain, and evaluate travel training programs for older adults. Transit operators need better information to understand the following: (1) how effective travel training can increase ridership, (2) which older adults are likely to benefit from travel training, (3) what barriers have to be overcome, and (4) what elements of travel training programs are linked to greater success among different groups of older adults.

To make the best use of existing and future travel training programs, transit operators and human services transportation providers need to understand which components of current travel training programs work best in which situations, which existing program components need modification to be effective with older persons, which new components to add, who are the most likely target groups for such programs, and what are the best ways to conduct outreach to those target groups. This project helps to fulfill those needs.

## Research Methodology

The Handbook and research report were grounded in a research approach intended to emphasize lessons learned from existing senior travel training programs. The process

began with identification of programs via a literature review and web-based search for active senior travel training programs and continued with more focused tasks. Key data for this research came from previous literature and new research; the new research focused on case studies of current travel training programs. The tasks conducted in this project were the following:

1. Review literature.
2. Describe travel training methods, models, and outcomes.
3. Construct travel training profiles and identify candidates for case studies.
4. Conduct case studies.
5. Match training programs to target audiences.
6. Prepare a detailed outline of the Handbook.
7. Prepare an Interim Report.
8. Analyze factors influencing the relative success of travel training programs.
9. Prepare final reports.

## Review of Prior Research and Publications

The literature search was conducted by first developing a set of search terms. These terms were derived from previous research of the project team (Burkhardt, McGavock, and Nelson, 2002, Burkhardt, McGavock, Nelson, and Mitchell, 2002, Molnar et al., 2007) and previous knowledge of the travel training literature. The list included the following terms: travel training, transit training, mobility training, transportation training, travel instruction, and transit instruction. Several databases were searched for information and literature: Google Scholar, the Transportation Research Information Database (TRID), ScienceDirect, and University of Michigan Transportation Research Institute's (UMTRI's) Library. An Internet search was conducted using these terms. A scan of transit organization websites was conducted to locate information about travel training programs that may be less well publicized. The project team assumed that most robust programs would use the Internet to promote their programs to social services agencies and other stakeholders even if they had little expectation that older adults might initially find their program via the Internet. Finally, documents were received from project panel members about promising programs that they knew about or were operating. Collected articles were reviewed for relevance. Articles from both the United States and abroad were included, although a decision was later made not to pursue programs outside of the United States, because it was thought that such programs might lack the cultural, geographic, and financial context needed to be relevant. Results of the literature review are included in Chapter 2.

## Case Study Selection Process

Information was collected on more than 80 travel training programs from the literature review and intensive Internet search described above. The search found 70 travel training programs that appeared to be active and specifically targeted older adults, disabled people (including older adults), or people of all ages and abilities. Of these programs, 62 were in the United States and were located in 26 states. Among the travel training programs in the United States that met the criteria, 8% were targeted solely for seniors, 39% were for seniors and people with disabilities, 34% were for all riders, and 18% were solely for people with disabilities. The content of the training was variable among the programs, but most focused on the basics of using fixed route transit: planning routes, purchasing tickets, recognizing bus numbers, proper boarding and departure procedures, landmark identification, transfers, use of lifts, and emergency procedures. Many programs also had training content specific for a trainee.

The programs utilized a variety of training methods, including one-on-one or individualized training; group, classroom, or workshop training; ride-along training; and most included some form of written materials for training. A majority of the programs (58%) utilized more than one method for training.

These programs were prioritized based on the likelihood that the program might serve older adults (e.g., programs that specifically trained transition-aged high school students on using fixed route transportation were not included). The list of prime candidates for further data collection was reduced to 25 agencies that had more detailed information about their travel training programs. This list included programs that made specific references to senior adults as target populations as well as programs that might reasonably address the needs of senior adults in programs for individuals with disabilities. Those programs deemed appropriate were further explored by collecting, organizing, and synthesizing data gathered using a common template. Summary profiles were shared with program managers, and an initial set of interviews was conducted to verify that information gathered via program websites was current, accurate, and as complete as possible.

A second ranking process was conducted to identify candidates for detailed case studies that would be created following site visits to selected sites. The ranking process used 13 factors that the project team considered to be indicative of high quality programs based on earlier research and the experience of the team in consulting with transit and social services agencies serving the target audience. The first two criteria were considered to be sufficiently critical that programs had to meet the criteria in order to receive further consideration. The remaining 11 criteria were weighted based on the relative

importance of factors as identified in the literature review. Criteria included the following:

- **Willingness to provide public information:** Programs had to be willing to allow information about their program to be made public.
- **Complete description:** Program details had to be available.

Programs that met these two criteria were further analyzed to consider the following elements:

- **Senior audience:** Were older adults a primary focus and target audience for the program?
- **Participation data:** Were participant data available to assess the reach of the program?
- **Broad range of topics:** Did the travel training program cover a broad range of topics in meeting the training needs of older adults?
- **Content externally reviewed:** Were training curricula or program materials reviewed by an expert or peer panel for quality, completeness, and effectiveness?
- **Degree of customization:** Did the program customize the training content and approach to meet the needs of a variety of consumers?
- **Before and after assessment and follow-up:** Did the program conduct pre- and post-training assessments to determine consumer needs and learning progress?
- **Mixed methods:** Were multiple teaching methods used to meet audience needs?
- **Years of experience:** How many years has the travel training program been operating? The number of years of experience demonstrates program sustainability.
- **Pre-test/pilot test of program:** Was the program tested and revised before being fully implemented?
- **Measures of success:** Did the program capture measures by which to draw conclusions about the success of the program, including results for consumers?
- **Formal studies:** Were any formal studies of the program completed, either at the pilot stage or during implementation? It was felt that valuable lessons learned could be achieved if the program had been rigorously studied.

A perfect score of 100 points was possible; the highest rated programs had scores in the mid-80s to low 90s.

There are many fine travel training programs for older adults. Based on the total scores for these factors, seven travel training programs were selected as programs that would most likely yield important information on how to create, implement, sustain, and evaluate travel training programs for older adults. These seven programs received substantially higher scores than any of the other potential case study candidates. These agencies, listed in alphabetical order by their location, were as follows:

- Via Mobility Services [formerly Special Transit] Boulder, Colorado
- Regional Transportation Authority Chicago, Illinois
- New Jersey Travel Independence Program (NJTIP) @ Rutgers New Brunswick, New Jersey
- Ride Connection Portland, Oregon
- Riverside Transit Agency Riverside, California
- Paratransit, Inc. Sacramento, California
- The Kennedy Center, Inc. Trumbull, Connecticut.

For each of these seven cases, members of the research team visited the sites for multi-day observations and interviews with program staff and key local stakeholders. Site visit findings, including interview content, were combined with narratives developed from existing descriptive information about the programs using a standardized template. Use of a consis-

tent format allowed researchers interested in a specific aspect of a program to examine the seven case studies to identify the specific program variable in which they were interested.

In addition to the seven detailed case studies, the TCRP panel asked the research team to develop profiles on 13 other programs that had been part of the review process. Information from 13 other sites was collected without site visits but with extensive interviews and follow-up activities. A standardized form was used to compile one- or two-page summaries for the 13 other cases. Case studies and profiles were reviewed by their program managers to ensure that information included was accurate and current. In addition, programs were asked to consent to publishing information about the program and to providing contact information.

A number of these 20 sites are referenced throughout this research; summaries of the information from the seven sites are provided in Chapter 4 and the 13 sites in Chapter 5. The 20 sites are identified in Table 1-1.

**Table 1-1. Travel training case study sites.**

<i>Case Study Sites</i>	<i>Program</i>	<i>Sponsor</i>
<i>In-depth Case Studies</i>		
<b>Boulder, Colorado</b>	Via Mobility Services Travel Training	Via Mobility Services
<b>Chicago, Illinois</b>	RTA Travel Training Program	Regional Transportation Authority
<b>New Brunswick, New Jersey</b>	NJTIP @ Rutgers	Rutgers, The State University of New Jersey
<b>Portland, Oregon</b>	RideWise	Ride Connection
<b>Riverside, California</b>	Freedom to Go	Riverside Transit Agency
<b>Sacramento, California</b>	Paratransit Mobility Training	Paratransit, Inc.
<b>Trumbull, Connecticut</b>	Senior Mobility Orientation, Travel Training, and Other Training	The Kennedy Center, Inc.
<i>Other Case Studies</i>		
<b>Akron, Ohio</b>	Travel Training	METRO Regional Transit Authority
<b>Cambridge, Maryland</b>	DCS One-Stop Mobility Management Travel Training Program	Delmarva Community Services, Inc.
<b>Canton, Ohio</b>	SARTA Travel Training	Stark Area Regional Transit Authority
<b>Columbus, Ohio</b>	Travel Training	Central Ohio Transit Authority
<b>Grand Rapids, Michigan</b>	The Rapid Travel Training	The Rapid
<b>Grand River, Ohio</b>	Laketrans Travel Training	Laketrans
<b>Meridian, Idaho</b>	Valley Regional Travel Trainers Program	Valley Regional Transit
<b>Monterey, California</b>	Monterey-Salinas Transit Travel Training	Monterey-Salinas Transit
<b>Olympia, Washington</b>	Intercity Transit Travel Training Program	Intercity Transit
<b>San Carlos, California</b>	SamTrans Mobility Ambassador Program	San Mateo County Transit District
<b>San Jose, California</b>	The Mobility Options Program	Santa Clara Valley Transportation Authority
<b>Spokane, Washington</b>	STA Mobility Training	Spokane Transit Authority
<b>Washington, D.C.</b>	WMATA's Travel Training and Outreach	Washington Metropolitan Area Transit Authority

## Research Team Analyses

In cases where data interpretations were required, the research team solicited findings from all research team members, then compiled, then discussed in emails and conference calls. Depending on the topic and the views presented, this process could be repeated numerous times until a solid consensus was reached.

## Reviews

The research team was assisted by a formal TCRP project panel which included experts in travel training for older adults. The project panel reviewed the research team's quarterly, interim, draft, and final reports, and offered numerous suggestions and ideas for improvements. In addition, draft final materials were reviewed by topic area experts not already part of the project panel.

## Data Limitations

The research team encountered a number of problems in assembling and analyzing the data for the case studies. As a profession, travel training is relatively new. While the vast majority of its practitioners are highly dedicated, resourceful, hardworking, and sensitive to individual needs, industry standards for data recording and reporting procedures have not yet been adopted or widely practiced. Many of the 20 case study sites applied significantly different procedures to recording and reporting their budgets, expenses, and results. This means that reports received by the research team of some numerical values might not be confirmed by detailed audit procedures and that information reported by various sites may not be strictly comparable to reports from other sites.

These were some of the specific problems encountered:

- The use of varying accounting procedures and charts of accounts, meaning that some of the reported expenses were incomplete and thus understated.
- An inability to distinguish among different types of clientele: for example, distinctions between young-old and old-old or between older adults with or without disabilities were not available.
- Little differentiation of training modes or methods; some sites did not report numbers of trainees receiving one-on-one training versus other kinds of training, such as group training or orientation sessions.
- No consistent follow-up procedures for trainees in terms of content or timing. Follow-up for trainees receiving one-on-one instruction was generally good; follow-up for trainees in group sessions or receiving other training was generally poor.

- A variety of methods for determining the benefits of travel training.
- A lack of long-range (more than 12 months) follow-up and benefit estimations.
- A general lack of precision in reporting; a frequent use of "guesstimates" instead of precise reports. Information sought was often located in different places within documents and reports with some data available in computer-ready formats and other data only handwritten.
- Reporting formats often depend more on the requirements of the funding source than the content or results of the training.

All of the seven in-depth case study programs offer travel training to seniors as a component of, or outgrowth of travel training for individuals with disabilities, including school-aged students with disabilities who had reached transition age (juniors and seniors in high school and high school graduates). The programs were often unable to distinguish among different types of clientele: for example, distinctions between young-old and old-old or between older adults with or without disabilities were not available. Many of the case study programs reported results for the overall program but not for the portion of the program targeted at senior adults. In many cases, seniors constituted a small portion of the overall training program, sometimes less than 10%. Far more detailed reports and outcomes were available for one-on-one training versus group training, but many of the programs did not report one-on-one training separately for older adults.

Some potentially useful information was not available. All of the programs studied offered group orientations or trainings for senior adults. In fact, a number of these organizations indicated that group training might be an efficient way to provide travel training to individuals who are otherwise healthy and not ADA-eligible because group training appeals to persons interested in learning and socializing with others. This is a common approach in senior center activities, which is where many of the programs studied offer their senior training. However, because group trainings are often a more limited engagement between the travel training program and the seniors who participate, the opportunity to conduct follow-up activities is limited, so the research team's ability to report on outcomes and success is thus limited.

Many of these programs began with a case management perspective. This approach has numerous benefits but also creates some problems. For example, even though a particular program produces fairly detailed annual reports on its activities, the reports do not summarize and provide answers to the post-training follow-up question on what has changed for seniors following travel training. Instead, results are filed in individual case records which could not be made available to be summarized because case files are

spread out within their filing system, and confidentiality concerns would have been raised if the research team had requested such reports. In addition, reports may have been handwritten, and there is no guarantee that results would have been easily accessible.

Despite these issues, a great deal of useful information is now available from these case study sites and others inter-

ested in improving travel training programs for older adults. Basic procedures and practices are now established, and the next step for the travel training industry is to take the kinds of information presented here to apply more consistent measures of its costs, benefits, and successes and to transmit that information to its sponsors, supporters, and other stakeholders.

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## CHAPTER 2

## Travel Training Practices

**Travel Training Literature Review****The Search for Existing Travel Training Programs**

The literature review had several purposes. The first was to identify and document existing travel training programs. All significant travel training programs found in the search were documented in a spreadsheet that included the name and location of the program, the target audience, a brief description of the type of training offered and how users accessed the training, and contact information. Nearly all transit companies that had a website provided at least some form of information concerning travel training. This training ranged from a simple website page that described how to use transit services to formal assessment and individualized training for older adults.

**Impacts of Travel Training Programs**

The second and third focal points for the review were to assess documented short-term and long-term ridership impacts of travel training programs for older adults and determine the factors that are most closely associated with positive outcomes for travel training programs. Results from the review indicated that only a small number of programs have been evaluated and most of these evaluations only looked at the short-term impacts. Key evaluation studies are reviewed here.

*Austin, Texas*

The Austin Resource Center for Independent Living (1995) worked with the Capitol Metropolitan Transit Authority in Austin, Texas, to develop and evaluate a travel training program for disabled users of paratransit as a Project ACTION demonstration project. People with disabilities were hired and trained to be peer trainers. The training pro-

gram included 4 hours of classroom instruction and 8 hours of practice on fixed route buses with the peer trainer. The classroom instruction presented information on locating bus stops, using a schedule, identifying bus routes, communicating with drivers, ridership rules, paying fares, contingencies and emergency situations, developing personal objectives, self-advocacy, and assertiveness. Pre-training assessment was conducted to determine capabilities and travel needs. The evaluation included 180 paratransit passengers with disabilities who completed pre- and post-training questionnaires. The study found that the frequency of fixed route ridership among the participants increased dramatically, with 63% of participants reporting that they used fixed route transit at least once a week compared to the 21% who reported this prior to training. The study also found a large decrease in the use of paratransit services, with 39% of participants reporting that they used paratransit after training while 66% reported this prior to training. In addition, the study found that 25 of the participants completely discontinued use of paratransit as a result of the travel training.

*East San Francisco Bay Area, California*

Babka, Cooper, and Ragland (2009) conducted an evaluation of an urban travel training program for older adults in the East San Francisco Bay Area of California. The travel training course was developed by Nelson\Nygaard Consulting Associates and consisted of 2 days of group classroom-based instruction. The course included an assessment of the group's understanding of public transit; an introduction to the types of transit services that were available in the area; and instruction on fares, schedules, tickets, and route information for the two primary transit systems in the area. On the third day, questions were answered and then participants and training instructors practiced riding on both transit systems.

To evaluate this program, the researchers partnered with a local senior-oriented organization to recruit study participants.

The evaluation consisted of administration of a questionnaire that assessed, with respect to the two transit systems, participants' knowledge, comfort levels, attitudes, concerns, and degree of familiarity. Participants completed a pre-training survey immediately prior to the first day of instruction and a post-training survey after the third day of training. Fifty-three pre- and post-training questionnaires were completed in four travel training sessions. About three-fourths of study participants were female and about 80% were ages 64 to 84. About one-half had at least a bachelor's degree, nearly all had incomes of less than \$30,000, 68% lived alone, and three-fourths reported that their health was good or very good. Only one-third reported that the personal automobile was their primary mode of transportation. The two most common reasons cited for taking the travel training course were planning for the future (56%) and feeling that they had no choice (42%). The evaluation found that there was a significant increase in knowledge after completing the travel training course. This significant increase in knowledge was found for nine areas: knowing how to find the desired transit line; knowing how to find the frequency of the desired transit line; knowing the difference between day/night frequencies; knowing the cost of riding public transit; knowing where to purchase tickets; knowing about senior passes; knowing how to identify the best seats for seniors; knowing how to request a stop; and knowing how to identify the emergency exit. No other pre- or post-analyses were reported.

### *Walnut Creek, California*

A study in Walnut Creek, California, tracked the development and evaluation of a video transit training program for older adults who lived in a senior adult community (Shaheen and Rodier, 2008). Based on a literature review and focus groups, the researchers developed an informational transit training video that was specific to the residents of the senior adult community. The video used well-known and well-liked citizens of the community and focused on how to successfully navigate the local transit system and problems related to using transit to get to certain key destinations. The transit training video was evaluated through a pre- and post-training questionnaire that assessed experience, use, and perceptions of transit use. Participants were recruited through community flyers, and 129 pre- and post-training surveys were completed. The survey results showed that 74% of the respondents were female, 52% were between the ages of 75 and 84, the average length of time living in the community was 7.5 years, more than 80% had at least a bachelor's degree, and 75% had an income of at least \$20,000 (with 20% having an income of at least \$110,000). Nearly all respondents reported that the personal automobile was their primary mode of transportation, but about one-third also reported that they used transit one

or more times per week. Thus, many of the survey respondents were already familiar with how to use the local transit system.

The results showed that the transit training video significantly improved perceptions of using transit for up to 65% of the respondents who were not experienced in using the transit system. The largest changes in perceptions were for how to obtain information on schedules, costs, and payment procedures. Those who were experienced reported few barriers, including a lack of information, to using transit. The survey asked about the likelihood of making trips by transit that the respondents might usually make with an automobile. The results showed that a modest but significant number reported switching to transit after viewing the transit training video. The study also addressed where respondents would obtain transit information. After watching the video, fewer respondents reported obtaining information from a friend, family member, or brochure, and significantly more respondents reported using paper schedules, transit training courses, the Internet, and the 511 phone number or website (<http://www.511.org>).

In follow-up research, Shaheen, Allen, and Liu (2009) re-contacted 61 of the original participants who had received the video transit training 6 months to 2 years earlier to assess the long-term impacts of the training. These participants completed a questionnaire that assessed their primary mode of transportation. Responses were compared to responses made by participants prior to receiving the training. The results showed a significant decrease (20%) in people who reported the personal automobile as being the primary mode of transportation and a significant increase in the percentage of people who reported transit as their primary mode (15%). No data were presented separately on the types of transit (e.g., fixed route vs. paratransit) or on the health and driving status of the respondents. It is possible that these results were related to people having to stop driving rather than the long-term effects of the training program.

### *British Columbia, Canada*

Tuokko et al. (2007) conducted an evaluation of group transit training in British Columbia, Canada in a collaborative project between University of Victoria Centre on Aging, BC Transit, a local traffic safety commission, and a seniors' group called Silver Threads. The training program was developed and delivered by representatives of BC Transit and included instruction on effective route planning, how to locate and board buses, paying fares, finding seating, how to request a stop, how to exit the bus, and other details of using the transit system. The training also included actual use of the transit system by participants and the instructor. The evaluation included 43 participants who rarely or never used the transit system,

had no physical limitation to using the transit system, were still driving, and lived in the areas served by the transit system. Participants were randomly assigned to one of three groups: a comparison that received no training (Group 1), a group that received the training (Group 2), and a group that received the training and a free 3-month bus pass (Group 3). The groups were roughly equal in age, years of education, and gender mix. A questionnaire was developed to assess the impact of the three training conditions on use of transit, changes in driving habits, and health status. Participants were mailed the questionnaire 3 months after the training and were requested to complete the survey and mail it back to the researchers. The study found that bus use was significantly greater for Groups 2 and 3 than for Group 1. There were no significant differences between Groups 2 and 3. Thus, the possession of a free bus pass did not increase ridership among this group of participants. There were no differences between any of the groups on driving habits after training including the number of miles driven per week, days of driving per week, and driving restrictions. All groups reported that their primary mode of transportation was the personal automobile. There were also no differences in the health status between participants in the three groups.

### *Washington, D.C.*

Researchers in the Washington, D.C. area evaluated the costs and benefits of travel training (Wolf-Branigin et al., 2012). Their evaluation report discussed the potential cost savings of travel training in the following way: “Travel training for ADA paratransit customers is a means of reducing transportation agency costs by equipping and encouraging these customers to travel on the fixed route system” (Wolf-Branigin et al., 2012). The researchers first developed a cost-benefit model through a series of expert panels and conferences to identify all the costs and benefits (Wolf-Branigin and Wolf-Branigin, 2010). The costs in the model included the following

- Vehicles and equipment to provide travel training (variable  $a$ ).
- Travel training personnel (variable  $b$ ).
- Supplies, equipment, and office space (variable  $c$ ).

The benefits included increased taxes paid by customers (variable  $y$ ) and cost avoidance (the cost of paratransit trips not provided minus the cost of the fixed route trips taken instead, variable  $z$ ).

The cost/benefit ratio was calculated as:  $(y + z) / (a + b + c)$ . The net benefit was calculated using the following:  $(y + z) - (a + b + c)$ .

The researchers worked with three public transportation agencies in two Western states to obtain agency-specific data

on each of these five variables. Annual benefit-cost ratios and net benefits were calculated for each agency. The benefit-cost ratios were all positive and ranged from 1.45 to 3.98 and the net annual benefits (savings) ranged from \$201,822 to \$440,918. The researchers concluded that travel training services can save public transportation agencies money. Sowden and Wick (2001) also report similar cost benefits of travel training in British Columbia.

### **Model Programs in the Literature**

The final objective of the literature review was to identify travel training programs that could be considered examples of model programs. Because of the absence of scientific evaluations of most programs, it is difficult to reach formal conclusions about which programs are models and which are not. In the absence of these objective data, the research team sought to find articles that, based on expert opinion, either discussed specific programs as being models or best practices in travel training or suggested components considered to be necessary for a model travel training program.

In her overview of travel training programs for seniors, Hardin (2005) discussed several programs she considered to be innovative. The first was the Easy Rider Program of Special Transit in Boulder, Colorado. The strengths of the program included individualized and comprehensive training, highly qualified instructors, hands-on training under actual conditions, and a strong focus on safety. The Charlotte Area Transit System was considered a model program that utilized group training. This program included a demonstration bus for providing training rides after the group presentations. Hardin (2005) also highlighted Michigan’s Ann Arbor Transportation Authority Travel Training Program and Florida’s *Palm Tran Seniors in Motion* as examples of programs with strong group education components. The overview listed several programs as being innovative in their use of peer training (also called travel ambassadors or travel buddies). These programs were the Lane Transit District’s Bus Buddies Program (Eugene, Oregon); the Great Falls Transit District travel buddy program (Great Falls, Montana); the Napa County Transportation and Planning Agency’s travel ambassador program (Napa, California); and Austin Resource Center for Independent Living ambassador program (Austin, Texas).

Karuth (1992) reviewed a travel training course in Boston, Massachusetts, for people with disabilities and offered several recommendations for developing travel training courses. Recommended features were also applicable to travel training programs for older adults and included responding to individual travel needs and concerns; presenting actual opportunities to practice using transit; providing instruction on reading schedules, getting information, paying fares, and reduced fares and passes; including transit providers and operators in the

training; developing individualized travel plans; covering all available transit options; and being flexible to allow for group input and planning.

Moakley (2001) discussed seven similar components for a successful travel training program for disabled riders, which are also generally relevant to older adults.

- The first component was to consider each passenger as an individual and tailor the training to the needs and capabilities of the individual.
- The second was to focus the program on passengers who are most likely to become frequent transit users—those who are motivated and able to travel independently.
- The third was to establish partnerships within the community to help with training and to identify groups who might benefit from travel training.
- The fourth was to emphasize the role of planning in the training. To this end, Moakley (2001) argued that travel training should include the basics such as carrying identification, having fare payments ready, dressing appropriately for the weather, and knowing alternate routes for travel.
- The fifth was to train people on the specific routes that they need and want to travel, preferably under actual conditions.
- The sixth was to make safe travel a priority of the training, including safety while waiting at terminals and when moving through facilities.
- The final component was to periodically follow-up with people who have taken the training to see if they are taking transit trips and providing additional training if requested.

In a review of the Community Travel Training Program in British Columbia, Canada, Sowden and Wick (2001) presented recommendations for successful travel training programs for seniors and those with disabilities. These recommendations included the following:

- Participation in the training should not preclude the individual from using paratransit.
- Individual participants should be assessed to understand their abilities and potential for safe and independent travel.
- Outreach activities should be geared appropriately to target audiences.
- Service providers should be committed to the concept of accessibility for all individuals.
- Costs, benefits, and other travel training impact information should be collected, analyzed, and used to improve the program.
- The community of users (disabled, seniors, and organizations that serve these people) should be included in planning.
- Ensure that funding is available for an effective program.
- Users should be recognized as individuals with (sometimes highly) individual training needs.

- Time constraints should be taken into account to ensure the most effective use of instructional resources.
- Qualified personnel should conduct the assessment, orientation, training, and follow-up activities.

## Compilation of Model Travel Training Program Components

There was significant overlap among the recommendations of key authors of previous literature. Based on these expert opinions, the following components integral to a model travel training program for older adults were identified:

- The travel training program should be developed with input from the target audience and the service providers.
- The program should include an assessment of the individual's capabilities and travel needs.
- The training should be tailored to the extent possible to the individual's capabilities and travel needs.
- At a minimum, the program should include both an instructional component (classroom, video, etc.) and a practice component where participants use the local transit system.
- The instructional component should include information on entering and exiting the transit facility, paying fares, special passes, purchasing tickets, reading schedules, locating seating, planning trips, personal safety, and transferring. If mobility devices are used, instruction should also be included about how to use lifts or other assistance when utilizing transit facilities.
- The practice component should include a trained and well-liked instructor who rides along with the participant. Practice should include going to destinations frequented by the individual.
- The program should follow-up with participants to monitor use of transit and to ensure that all training needs have been met. Follow-up training should be available if needed.
- The program should have an ongoing system for gathering, analyzing, and tracking the impacts of the training. Important impacts include transferring of participants' use of paratransit to fixed route transit; changes in the use of fixed route transit; changes in participants' attitudes toward transit, meeting of mobility needs, and quality of life; and comparisons of the cost and benefits.

## Programs Identified as Model Programs

As part of this project, an extensive search for travel training programs for older adults in the United States was conducted. This search involved programs identified by the TCRP project panel and programs identified through an Internet search and a search of published literature. Based on the components of

a model travel training program discussed earlier, seven programs were identified as model programs worthy of in-depth case studies. While these seven programs did not necessarily include every single component of a model program, they were considered to represent the strongest candidates in terms of having incorporated model components into their operations. In alphabetical order by location, they are as follows:

- Boulder, Colorado: Via Mobility Services Travel Training, Via Mobility Services [formerly Special Transit].
- Chicago, Illinois: Regional Transportation Authority (RTA) Travel Training Program, Regional Transportation Authority of Northeastern Illinois.
- New Brunswick, New Jersey: NJTIP @ Rutgers, Rutgers, The State University of New Jersey.
- Portland, Oregon: RideWise, Ride Connection.
- Riverside, California: Freedom to Go, Riverside Transit Agency.
- Sacramento, California: Paratransit Mobility Training, Paratransit, Inc.
- Trumbull, Connecticut: The Kennedy Center Senior Mobility Orientation, Travel Training, and Training and Professional Development for Transit Staff, The Kennedy Center, Inc.

Another 13 programs were also considered to employ best practices for a model travel training program:

- Akron, Ohio: Travel Training, METRO Regional Transit Authority.
- Cambridge, Maryland: DCS One-Stop Mobility Management Travel Training Program, Delmarva Community Services, Inc.
- Canton, Ohio: SARTA Travel Training, Stark Area Regional Transit Authority.
- Columbus, Ohio: Travel Training, Central Ohio Transit Authority.
- Grand Rapids, Michigan: The Rapid Travel Training, The Rapid.
- Grand River, Ohio: Laketrans Travel Training.
- Meridian, Idaho: Valley Regional Travel Trainers Program, Valley Regional Transit.
- Monterey, California: Monterey-Salinas Transit Travel Training, Monterey-Salinas Transit.
- Olympia, Washington: Intercity Transit Travel Training Program, Intercity Transit.
- San Carlos, California: Samtrans Mobility Ambassador Program, San Mateo County Transit District.
- San Jose, California: The Mobility Options Program, Santa Clara Valley Transportation Authority.
- Spokane, Washington: STA Mobility Training, Spokane Transit Authority.

- Washington, D.C.: WMATA Travel Training and Outreach, Washington Metropolitan Area Transit Authority.

Brief descriptions of the seven model programs examined in-depth are provided below. The complete case studies on these programs are presented in Chapter 4. For additional information on the 13 model programs listed above, see Chapter 5.

## **Descriptions of Model In-Depth Case Study Travel Training Programs**

### *Via Mobility Services Travel Training, Via Mobility Services, Boulder, Colorado*

Via Mobility Services Travel Training Program is part of Via Mobility Services, (formerly known as Special Transit) a non-profit community organization in Boulder, Colorado, whose mission is “to promote independence and self-sufficiency for people with limited mobility by providing caring, customer-focused transportation options.” The Travel Training Program offers individual and group travel training to older adults, people with disabilities, and low income individuals to give them the skills to safely and confidently use the public transportation system in Boulder County. The program evolved from earlier, more informal efforts in the city of Boulder, with program growth in response to identified unmet need for travel training among older adults and people with disabilities. Via Mobility Services, which offers paratransit and other mobility services, provided the infrastructure and other resources for the program. The program represented an opportunity to meet a growing unmet need for travel training services in the Boulder area. To a great extent, this opportunity was seen as being able to expand the mobility choices for people, some of whom were already using paratransit but were capable of and interested in using more spontaneous forms of transportation. This program is considered to be a model program because it has the following components: a comprehensive set of travel training services offered, including training using actual transit services; individualized assessment and customized training programs; extensive outreach efforts; strong partnerships, promotion, and outreach; program staff that are highly competent and dedicated to serving individual program participants; and strong and dynamic leadership.

### *RTA Travel Training Program, Regional Transportation Authority of Northeastern Illinois, Chicago, Illinois*

The RTA Travel Training program provides outreach to more than 500 different private nonprofit organizations. The primary partnerships are with the Chicago Transit Authority

(CTA), Metra, Pace, and the Chicago Lighthouse for the Blind. The target audience for the RTA travel training program has been ADA applicants for complementary paratransit services. The RTA has shifted from a program that identified people eligible for travel training through the ADA paratransit application process to identifying people through outreach. The RTA Travel Training program is considered to be a model because it has the following components: individualized assessment and training, utilization of a variety of training methods including training in the field using actual transit services, short- and long-term follow-up with participants to ensure that they are still able to use transit, instruction for people who use mobility devices, and travel trainers who are well-liked and come from social services backgrounds.

### *NJTIP @ Rutgers, Rutgers, The State University of New Jersey, New Brunswick, New Jersey*

The mission of NJTIP, Inc. is “to teach persons with disabilities, senior citizens and other transportation disadvantaged populations to use public transportation as a means to increase independence and self-sufficiency.” In 2013 NJTIP Inc. became part of the Alan M. Voorhees Transportation Center in the Bloustein School of Planning and Public Policy at Rutgers, The State University of New Jersey, and became NJTIP @ Rutgers. This program is considered to be a model program because it has the following components:

- individualized assessment and customized training based on individual needs and abilities;
- a wide variety of training methods including instruction while using actual transit services;
- seminars for professionals and volunteers from social services agencies, schools, and senior residences on how to become informed advocates for public transportation, so they can better assist their clients, students, and residents with navigating the public transportation network;
- provision of short- and long-term follow-up with participants;
- incentives to promote the continued use of transit after graduation; and
- the ongoing evaluation of program costs and benefits.

### *RideWise, Ride Connection, Portland, Oregon*

Ride Connection is a nonprofit community service organization that offers transportation assistance to persons with disabilities and seniors without alternative transportation. Ride Connection serves a three-county area, including Washington, Multnomah, and Clackamas Counties. The service area is both urban and rural. The organization prides itself on an ongoing commitment to identifying transportation needs and filling them. The RideWise program teaches older

adults and people with disabilities to travel independently and safely on all forms of public and other forms of transportation. It employs a person-centered social services model based on increasing individual independence. Its overarching goal is to link people to services, to open up a person’s world to the possibilities available to them. A related goal is to maintain independent living at the trainee’s current residence for as long as possible. This program is considered to be a model program because it has the following components: individual assessment and instruction; a wide range of training programs, including a special program for those who use mobility devices; post-training follow-up with participants; consistent growth in number of participants for the past 8 years; collection and evaluation of data from most participants; and collection and analysis of program cost/benefit data.

### *Freedom to Go, Riverside Transit Agency, Riverside, California*

The Riverside Transit Agency is the Consolidated Transportation Service Agency for western Riverside County. The large service area is both urban and rural. After designing the program and hiring staff in 2010, RTA began its travel training program in 2011, with the first travel training completed in November 2011. The program was established to train and encourage people with disabilities, including older adults, to learn to use fixed route service to reduce dependency on RTA’s paratransit service. Freedom to Go has been available for older adults from the outset of the travel training program. The impetus for making the training available to older adults was senior isolation, particularly in smaller communities and rural areas. The main goals of the travel training program are to increase capabilities and self-sufficiency while facilitating the most suitable and efficient transportation service for each person. This program is considered to be a model program because it has the following components: programs that include both one-on-one and group training, individual assessment and customization of one-on-one training, incentives to post-trainees to promote continued use of fixed route transit, electronic monitoring and assessment of ridership, long-term follow-up with participants, extensive outreach, and collection of satisfaction data from participants.

### *Paratransit Mobility Training, Paratransit, Inc., Sacramento, California*

Paratransit, Inc. is a private nonprofit corporation dedicated to providing transportation services to individuals with disabilities, to the elderly, and to related agencies throughout Sacramento County. Paratransit, Inc. has been offering travel training for the past 30 years, with some of the staff working at Paratransit the entire time the program has been operating. The

program focuses on travel training for people who have disabilities, as well as the elderly, and teaches safe and proficient use of regular public transit. In Sacramento, that includes Regional Transit buses, light rail, and Neighborhood Ride route deviation shuttles. This program is considered to be a model program because it has the following components: longevity; individual assessment and training for specific destinations; incentives for participation (free bus passes); extensive outreach and program promotion; a range of training modes; follow-up with participants; highly experienced staff; and extensive recordkeeping on training, costs, and benefits.

*The Kennedy Center Senior Mobility Orientation, Travel Training, and Training and Professional Development for Transit Staff, The Kennedy Center, Inc., Trumbull, Connecticut*

The mission of The Kennedy Center is “to promote the empowerment of these individuals to achieve their optimal participation and inclusion in the community with both dignity and confidence.” The Kennedy Center (TKC) does this by offering services, including travel training, to individuals with disabilities and the elderly. In addition to training seniors and people with disabilities, TKC offers training to transit agency staff and consulting/project implementation support to other organizations starting up travel training projects. This program is considered to be a model because it has the following components: a wide variety of training approaches; individual assessment and customized training; short- and long-term follow-up with participants; instruction on a wide range of training topics; programs to train people to conduct travel training; and extensive partnerships, promotion activity, and outreach activities.

## Current Conditions and Practices of Travel Training Programs

This section summarizes the current conditions and practices of travel training programs, with particular focus on those programs considered to be model programs. Current conditions are the organizational models under which programs operate and the resources they have available to them, as well as the partnerships that are currently in place and outreach efforts being undertaken. Current practices are the types of training offered by the travel training programs, as well as the specific training content and the teaching methods used to deliver that content to the target audience.

## Organizational Arrangements and Resources

The majority of the model travel training programs operate as private nonprofit corporations, although other orga-

nizational types include consolidated transportation service agencies, state university programs, and public transportation systems. Programs draw upon a variety of resources to maintain their program efforts including grants, contracts, fees, revenues from various taxes, as well as other local and state monies. In addition, many programs rely on the efforts of volunteers to supplement their funding.

**TKC** is a private nonprofit corporation that receives funding from a mobility training grant from the Connecticut Department of Transportation via CTTRANSIT. There is no specific budget set aside for the senior travel training program. TKC uses full-time staff to support the senior travel training program, and does not use volunteers. TKC, at the time of the case study, was in the fourth year of a 5-year grant.

**NJTIP @ Rutgers** is a state university program with funding from NJ TRANSIT (for seven of the counties it serves) and federal New Freedom monies (for three of the counties it serves). The program was formed as a private nonprofit organization in 2007, but ownership was transferred to a university-based research center in 2013 to ensure sustainability. The program does not use volunteers.

**Ride Connection's RideWise** is a private nonprofit corporation funded through a federal Job Access Reverse Commute (JARC) grant, as well as funding from TriMet and state cigarette tax revenue. RideWise has nine full-time positions, as well as 40 volunteers, 22 of whom serve as Ride Ambassadors, four as Co-presenters, 10 as Transit Advocates, and four as RideWise Work Group members.

The **RTA Travel Training Program** is a public transportation system that constitutes a special purpose unit of local government and a municipal corporation of Illinois. Its revenues come from RTA's operational funding. The RTA travel training program staff includes the Manager, the Travel Training Coordinator, and five Travel Trainers. In addition, the RTA contracts with the Chicago Lighthouse for the Blind, which employs Orientation and Mobility Instructors to provide travel training to RTA's blind and visually impaired clients. The RTA does not use any volunteers.

**Paratransit, Inc.** is a private nonprofit corporation. Its revenue comes from vendor agreements with the Alta California Regional Center and the California State Department of Rehabilitation, as well as a New Freedom grant that provides mobility management and travel training in the region, a JARC grant, and funding from the South Area Transportation Management Association. In addition, Paratransit, under the name Innovative Paradigms, brings in revenue from providing consulting services and travel training program management for other agencies. Over the past few years, the travel training program has varied in size because of budgetary issues. Currently, Paratransit, Inc. has three full-time travel trainers; at one point, the program had expanded to seven full-time travel trainers.

**Via Mobility Services'** travel training program is a private nonprofit corporation that gets its funding from Boulder County, the city of Boulder, the Denver Regional Mobility and Access Council, and the Regional Transportation District, as well as United Way, foundations, and fees. The program had been receiving over \$100,000 per year from its contract with RTD, and with its new contract, that will begin again. In addition, Via's Travel Training Program recently became a vendor to provide services to the Colorado Department of Vocational Rehabilitation and Via has also been awarded federal funding (Section 5310 funds) to create a metro areawide program in 2014. Staffing resources for the travel training program include the coordinator, who represents the travel training program as well as the larger organization; two travel trainers, one of whom is Spanish speaking; and a grants/finance person for Via who works on program funding.

**Riverside Transit Agency Freedom to Go** is a Consolidated Transportation Service Agency with funding from federal New Freedom and JARC grants, as well as revenues from a local fuel tax. The Freedom to Go travel training program has three full-time travel trainers, one of whom is the travel training supervisor. Each of the travel trainers focuses on different segments of the population (students with developmental disabilities who are transitioning out of high school, people with disabilities who are using RTA's paratransit service, and older persons). The program is housed in RTA's Operations Department and is managed by the Director of Contract Operations.

## Partnerships and Outreach

All of the model programs are heavily dependent on partnerships to support their travel training activities. Key partners include transit agencies that are not only a primary funding source, but also that provide referrals to clients who either may not be eligible for ADA paratransit services or who transit agency staff think might benefit from using a mix of ADA paratransit for some needs (for example, travel to doctor's offices or medical facilities that are not near fixed routes). Transit agencies also offer fixed routes to provide flexibility and lower cost alternatives when appropriate. Human and social services agencies that provide services to individuals with disabilities or special travel needs serve a key role by providing referrals and developing travel training programs to assist their constituencies. Senior centers and senior housing complexes, especially those that are U.S. Department of Housing and Urban Development subsidized are key partners, particularly for group travel training. Hospitals are also key partners at some sites. Several programs offer training to staff and volunteers in partnering agencies to make them aware of fixed route transit options and the potential benefits of travel training for their clients. Word of mouth referrals are considered important.

**TKC** is frequently in touch with transit districts, social and human services agencies, and senior housing developments in Connecticut, but especially those serving large urban areas such as Hartford, Bridgeport, New Haven, and Norwalk. Much of their outreach efforts are word of mouth. The majority of referrals come from front-line staff in the transit districts who work on ADA eligibility issues and with older adults. With the support of the Federal Transit Administration, the Connecticut Department of Social Services, and the Connecticut Department of Transportation, TKC developed Public Transit 101, a program that includes outreach workshops with a PowerPoint training presentation and bus tours designed to increase human services agency and staff awareness of the importance of transportation for people with disabilities and seniors, including information on the range of transportation options in Connecticut.

**NJTIP @ Rutgers** partners with NJ TRANSIT, as well as regularly reaches out to and partners with agencies that serve seniors, housing projects with senior residents, and Area Offices on Aging. The NJTIP @ Rutgers Board of Directors includes representatives from some of the partnering organizations. Everyone at NJTIP @ Rutgers markets the program even though one staff person conducts the trainings with older adults, including group trainings. The program has limited its outreach efforts to the seven counties where it has been providing services under the NJ TRANSIT grant. However, part of the motivation for partnering with the Voorhees Center at Rutgers University was to expand program outreach beyond the seven counties. The Voorhees Center website has been updated to include descriptions and contact information for the NJTIP program and its staff. The NJTIP @ Rutgers staff believe there is a growing need for travel training services throughout New Jersey, especially for senior group training, and are eagerly seeking and pursuing funding opportunities in that regard.

**Ride Connection's** key partner in the RideWise program is TriMet, the local transit agency. Over many years, Ride Connection and TriMet have forged a close and productive working relationship that has proved to be greatly beneficial to both organizations. Other key partners include human services providers, volunteers, travel trainers, and the community as a whole.

In Chicago, **RTA's travel training program** primarily partners with CTA, Pace, and Metra. The program also has a contract with the Chicago Lighthouse for the Blind that provides the travel training for RTA's blind or visually impaired travel training participants. RTA, as with other model programs, has historically conducted outreach by targeting individuals during the ADA eligibility process, but has recently shifted to identifying people through outreach. RTA now has contacts to perform outreach at more than 500 social services and human services organizations. This new emphasis started

in January 2013 and is designed to increase the number of seniors receiving travel training.

**Paratransit, Inc.** conducts outreach efforts to senior communities and senior programs throughout Sacramento County. Presentations are made at most senior centers and complexes approximately once a year, with follow-up as necessary. Paratransit, Inc. also has working relationships with programs such as the Foster Grandparents Program, which is a senior organization for retired and low income persons over the age of 55. Paratransit works with organizations like this to help plan events that will be accessible using public transportation and to help seniors gain access to these events. The program also performs a group training and orientation once a year with Foster Grandparent Program participants to explain what travel training provides and how it can be used to help the volunteers.

The **Via Mobility Services** Travel Training Program partners with the Denver Regional Mobility and Access Council (DRMAC), the regional transportation coordinating agency, to offer travel training programming in the Denver metro area to serve older adults and people with disabilities. The partnership between Via and DRMAC has also resulted in a program that trains volunteers from various Denver area organizations to help older adults, people with disabilities, and low income individuals use public transit. In addition, a Train the Trainer Program is offered. Recently, one of Via's travel training was independently awarded a grant to establish travel training options for Latino older adults in the Denver metro area. The travel trainer will receive a 2-year fellowship through the Colorado Latino Age Wave Initiative (CLAWI) to work with agencies and organizations serving older adult Latinos to establish a self-sustaining travel training programs. Via also provides outreach through a program in which individual volunteers at independent living communities inform their peers of travel training options and encourage them to participate in one-on-one training.

Key partners in the **Riverside Transit Agency Freedom to Go** program include community agencies, hospitals, senior services, school districts, the Department of Rehabilitation, the Department of Education, Inland Regional Center, and RTA's Dial-a-Ride program. RTA promotes its travel training program on its website and through educational materials and activities such as bilingual brochures, mailings, and presentations to its key partners. In addition, Freedom to Go works with the Braille Institute, the California Council for the Blind, and the California School for the Deaf. Word of mouth referrals are also important.

## Types of Training

Travel training programs offer some combination of one-on-one training and group training, as well as train the trainer programs and other consultation services. The specific types

of training offered by the model programs are summarized below by program.

**TKC** offers four relevant training options:

- **One-on-one training:** The TKC travel training program got its start providing one-on-one training for people with disabilities on using fixed route transportation, and advising them on the range of transportation options available in Connecticut. In 2005, TKC sensed that seniors who might not be eligible for ADA paratransit, and even those who are, might benefit from one-on-one travel training. The target audience for one-on-one training for seniors is anyone over age 60.
- **Senior mobility orientation:** This is designed to assist seniors in using public transportation for daily travel needs. An instructor works with participants to introduce them to the bus or train routes they would like to learn. It can be as simple as helping them find and read schedules or plan a trip. The instructors will accompany individuals on their first few transit trips. TKC staff conducts Senior Mobility Orientations throughout Connecticut, focusing on senior centers, so the target population for senior mobility orientation is seniors who visit senior centers. Orientations include a discussion of all of the mobility options available to seniors, including using paratransit when it better meets the needs of ADA-eligible seniors and using fixed route transit when that best suits their needs.
- **Mobility Management Project:** In February 2011, TKC received a grant from the federal New Freedoms program to conduct a Mobility Management Project. This project aims to coordinate all transportation options for people with disabilities, seniors, and veterans in southwestern Connecticut, identify gaps in service, and help implement new service where it is most needed. Essentially, The Kennedy Center is creating a "one-stop shop" where individuals can find solutions to their transportation challenges, including travel training.
- **Travel Training Consultation:** TKC conducts "Train the Trainer" seminars and consults with agencies interested in starting a Travel Training Program. The focus is on consulting for other entities that want to start travel training programs, not on training individuals to themselves become travel trainers.

**New Jersey Travel Independence Program (NJ TIP) @ Rutgers** serves seniors, people with disabilities, students in special education, and social services professionals. The NJ TIP @ Rutgers mission is accomplished by providing three types of services that can benefit seniors:

- **One-on-one travel instruction** is designed to teach individuals with disabilities how to use public transportation safely

and independently. NJTIP @ Rutgers participants receive a personal travel instructor who travels on the bus or train with each participant and provides individualized instruction in travel skills, assistance in researching travel routes and schedules, and a free one-month bus pass upon graduation.

- **The Small Group Travel Training Program** has a maximum of 15 participants in each training session. The program supplements the original one-on-one travel instruction service. This training is appropriate for senior citizens and people with disabilities who do not need intensive personalized training. For small group travel training, NJTIP @ Rutgers works with a partner agency such as a residence for senior citizens, a senior center, or an independent living center for persons with disabilities. The partner agency recruits individuals who are interested in learning to use public transportation and NJTIP @ Rutgers provides the training.
- **Train the Trainer** and **Connect to Transit** seminars are designed for social services professionals whose job duties include travel training. The Train the Trainer seminars are appropriate for both beginning and experienced travel trainers and are specifically geared to using NJ TRANSIT bus and rail systems. Train the Trainer helps human services and community services professionals who work with seniors become more informed about travel training and more likely to recommend travel training to seniors with whom they work.

Ride Connection's **RideWise** program teaches older adults and people with disabilities to travel independently and safely on all forms of public and other forms of transportation. Services are provided at no charge for those who qualify. Their training includes:

- **One-on-one travel training** is short-term, practical, and individualized instruction to teach older adults and people with disabilities to travel safely and independently using public transportation.
- **Group travel training** is available for people receiving support through transition programs, older adult residential facilities, community centers, and more. Outings are designed to encourage the use of public transportation by choosing a familiar destination.
- **Riders Club trips** are designed to give more opportunities to become comfortable with the public transit system by creating fun adventures that include riding fixed routes to and from the destination. Activity directors at residential facilities and senior centers coordinate these regularly scheduled trips.

The target audience of Chicago's **RTA** travel training program has been ADA applicants for complementary para-

transit services, but recently shifted to recruitment through outreach. RTA's travel training program includes one-on-one training and group training.

- **One-on-one travel training:** Travel trainers train an individual for three specific trips and work with the individual until he or she can take the trips with no assistance. The trainer lets the client take a trip alone while trailing the client. Once the trainer is sure the individual can take a specific trip alone, he/she trains for a second trip.
- **Group training:** This is RTA's primary method to approach non-ADA clients. A trainer makes presentations to groups, generally including 20 to 25 people, but sometimes as large as 80 or more people. The presentations explain the RTA travel options and address safety and operational issues. Other common topics include how to pay the fare, how to ride, and how to inform the driver of desired stops.

**Paratransit, Inc.'s** target population includes individuals who are developmentally disabled, physically challenged, and mentally disabled, as well as seniors. Often those persons with more than one disability are seniors. Paratransit, Inc. offers the following types of training:

- **One-on-one training** is provided in Sacramento and a number of the surrounding communities to provide information on fixed route transit.
- **Small group training** involves "bus buddies" for people to become confident together on riding the bus.
- **Mobility training consulting** includes information on how to implement a mobility training program, methods and tools for assessing trainee abilities, a proven training model, successful instruction procedures, and methods and tools to evaluate success.

**Via Mobility Services'** target audience is made up of older adults, people with disabilities, and low income individuals. Recent efforts have also focused on Latino older adults. Most of the participants in the program no longer drive themselves. Many continue to use paratransit as well as public transportation depending on the nature of the trip or the circumstances under which it is being taken.

- The **Easy Rider Program** (ERP) is a comprehensive one-on-one travel training program designed to teach older adults and people with disabilities how to safely and confidently use public transportation to expand independent travel options. Training techniques are adapted based on an individual's abilities or disabilities. Older adults make up about one-third of participants in the ERP.
- **Seniors on the Move** is a group travel training program targeted to older adults. It has two components—a classroom

orientation on basic public transit followed by an outing on a fixed route bus. The outing is generally to a specific location/activity (e.g., a museum, shopping or an eating destination), during which a “hands-on” approach is used to discuss how to use public transit. The program is targeted to both older adults who do not drive, as well as those who still drive but may want additional transportation options.

- **Volunteer Best Buddy Program** grew out of a partnership between Via and the DRMAC that trains volunteers from various Denver area organizations to help older adults, people with disabilities, and low income individuals use public transit. Once trained, the volunteers accompany riders on transit to help them build skills and confidence in using public transit.
- A **Train the Trainer Travel Training Instruction Program** is offered that includes an intensive 2-day workshop for people interested in starting a travel instruction program.
- The **Get on Board program**, conducted in partnership with the Regional Transportation District (RTD) in Denver, was aimed at people who were already using RTD’s complementary paratransit (Access-a-Ride). RTD contracted with Via Mobility to provide travel training to help move people from paratransit to public transit.

**Freedom to Go**, based in Riverside, California, offers group training for seniors as well as one-on-one training for seniors and individuals with disabilities. Freedom to Go is founded on the belief that “people don’t need to be independent to travel train, they need to travel train to become independent.” All travel training is provided by Riverside Transit Agency travel trainers. Separate elements of the program target people with disabilities who ride paratransit service and seniors who are aging out of their driver’s licenses.

- **The Senior Ambassador Program** introduces seniors to fixed route service through group training. Typically, seniors from a senior center or other locations where seniors gather take a guided ride together. The travel trainer conducts an orientation session to introduce seniors to the steps involved in taking a bus ride and returning. The seniors agree on a destination to which they will travel, in a group, two weeks later. The trip is made on a bus that is not in service from the location where the orientation session was held but follows the same route that serves the senior center or other location where the orientation was held. At the end of the group trip, one-on-one travel training is scheduled with seniors who want additional training. Group travel training is conducted in groups of no more than ten persons, so that trips do not get over-crowded.
- **One-on-one travel training** is provided to seniors who have completed the group travel training. Training lasts as

long as required for a senior to be able to travel successfully on his or her own.

## Training Content and Methods

The specific training content and methods vary depending on the type of training offered and characteristics of the target audience and community in which the training is being offered. However, there is much overlap in content and methods across the various model programs. Training content and methods used by the model programs are highlighted below by program.

**TKC**, similar to other model programs, conducts a pre-assessment on each potential one-on-one trainee that includes information on the extent to which the individual has used public transportation, how he or she currently travels, transportation costs, identification, daily activities, concerns, cognitive recognition, physical or medical issues, questions and concerns on coping skills, and logistical issues. TKC conducts route research to help the senior get to the desired destinations. Trainers then record training recommendations. TKC staff prepares a customized training plan and continue to provide training support until the individual has mastered the skills needed to independently use fixed route transportation. TKC then conducts a post-travel training test to ensure that the individual has mastered the necessary skills to use fixed route transit.

TKC’s one-on-one trainings are in the field, and involve meetings with participants at their homes, followed by ride-along escorts to the individual’s chosen destinations. The program is customized based on the pre-training assessment and measure of pre-training skills. Issues typically addressed in one-on-one training include skills needed to use fixed route transit such as knowing what time to leave, location of the transit stop, and how to identify transit vehicles through number, color, style and/or inquiry; having appropriate identification and fare media; communication, including signaling the operator, talking to the driver about transfers or for additional information, and interacting with strangers; proper riding behavior, including knowing the rules on the transit vehicle; safely crossing streets; being prepared for unexpected circumstances; what to do if lost; proper wheelchair securement; self-advocacy; and navigating fixed routes, including signaling for a stop, exiting through a door, and making transfers. TKC conducts follow-ups at 1 month, 3 months, 6 months, and 1 year post-completion to determine the extent to which the individual is using fixed route transit, identify any problems the individual has had, determine how many round trips he or she takes within an average month, and identify the biggest difference for the individual as a result of the travel training. At the beginning and the end of training, the travel trainer completes a pre- and post-training test to

rate the participant's competence level on a skill. The training for each participant is based on the particular aspect of the travel training components which cannot be accomplished without reassurance, verbal prompts, or physical prompts. When a participant can complete all of the skills without assistance, the participant is deemed to have successfully completed travel training.

One-on-one travel training instruction at **NJTIP @ Rutgers (NJTIP)** teaches individuals how to use the public bus and rail systems so they can travel independently and safely. A personal travel instructor escorts participants on the bus or train. Travel instruction is personalized and customized to meet individual needs identified during a pre-screening process. Individualized instruction in travel skills is provided, as is assistance in researching travel routes and schedules. Trainees receive a free 1-month bus pass upon graduation. One-on-one travel instruction has five components: outreach, intake interview, route check, one-on-one travel instruction, and follow-up retraining. Small Group Travel Training includes two classroom sessions on the basics of travel training (generally taught to groups of 10–15), and includes a trip to a local destination to practice skills. Participants then take one or two additional trips with the instructor to destinations of their choosing so they can master these routes and travel them on their own. Train the Trainer Seminars include a half-day course that covers travel training basics such as understanding schedules; calculating and paying fares; emergency preparedness; and trip planning resources. A full-day classroom course covering travel training basics is available, as is a field trip on a NJ TRANSIT bus so that participants can practice the topics discussed in the classroom portion.

**RideWise's** publication *A Guide to Travel Training* describes its approach to one-on-one travel training as including “a short-term, one-on-one, intensive and individualized course of instruction designed to teach older adults and people with disabilities to travel safely and independently using public transportation” (Ride Connection, 2009). This level of service is nearly always provided by staff travel trainers. According to the publication, trainees who are successful become proficient in crossing streets safely, identifying and boarding the correct vehicle, problem solving, demonstrating decision making skills, following directions, initiating action, and maintaining appropriate behavior.

The **RTA** in Chicago uses different training methods for one-on-one training versus group training. The one-on-one training has been targeted primarily to people with intellectual or cognitive disabilities, and includes very intensive one-on-one activity customized to meet individual needs. The group training consists of orientation to different transit systems. The travel trainer discusses fare collection, boarding and alighting, safety, and rights and responsibilities. In addition, during the presentation the trainer answers questions

and offers individual attention after the presentation. There are many handouts and a PowerPoint presentation.

**Paratransit, Inc.'s** Mobility Training includes how to get to and from the bus stop or light rail train station, training to specific destinations, and how to identify landmarks. As with other model travel training programs, Paratransit, Inc.'s one-on-one training includes riding with the trainee on the bus or train, working with the trainee's schedule, and showing the trainee how to plan bus and light rail routes. Group travel training is presented at senior complexes or senior centers. Written materials are provided to seniors. They each receive a handbook for attending. Many of the seniors sign up for one-on-one training following group orientation, a result that is not widely seen in other programs such as The Kennedy Center and NJTIP @ Rutgers.

**Via Mobility Services'** travel training content includes the following programs:

- One-on-one travel training (ERP): An in-home mobility skills assessment is conducted. Pre-trip planning is conducted to check the environment. Customized travel training is then provided and includes planning a trip, getting to the bus stop and boarding, paying fare, recognizing landmarks and signaling to get off, transferring from one bus to another, using safe pedestrian skills and stranger awareness, problem solving such as missed connections, and understanding rights guaranteed by ADA.
- Group training (Seniors on the Move) covers the benefits of public transit, planning a trip, fares, using transfers, issues at the bus stop, getting on the correct bus, requesting accommodations, requesting a stop, and disembarking.
- Volunteer Best Buddy Program (through partnership with DRMAC) includes skills assessment, an overview of public transit, bus riding basics, overcoming travel barriers, an overview of rights/accommodations, how to plan a trip, disability awareness, fares, light rail, and ongoing support.
- Train the Trainer Program (through partnership with DRMAC) includes topics such as starting a travel training program; overview of instruction models; disability awareness/first-person language; program documentation; emergency procedures/ADA/Code of Ethics; professional organizations and resources; and best practices including program documentation, travel training planning, and step-by-step objectives; and how to conduct field training.

Via Mobility Services' travel training teaching methods for the one-on-one training include in-home and field training components. The field training components focus on environmental analysis and trip planning, and follow-up group training takes place over 2 days and includes a 1½ hour classroom instruction (with PowerPoint presentation) on the first day of training and a 2 hour field trip on the bus on the

second day of training. The Volunteer Best Buddy Program involves a full day of one-on-one training. Trained volunteers accompany riders and provide them with information and encouragement to build their skills and confidence. The Train the Trainer Program consists of a two-day comprehensive workshop.

**Freedom to Go's** one-on-one training covers route familiarization, how to read Riverside's Ride Guide, understanding the system map, and trip planning and mobility device training. An individual travel training plan is prepared for each senior being trained. In the course of conducting one-on-one training so individuals are able to overcome barriers, direct action is taken to mitigate and/or eliminate barriers that are encountered, including route modifications in some cases. The travel training involves the following steps prior to route training: assessment of basic skills; assessment of path of travel and barriers; assessment of personal safety skills; use of Ride Guide and maps to plan a trip; and meeting with trainee, parent, care provider, and/or guardian for travel consent. Freedom to Go's travel trainers describe and demonstrate correct methods for all skills, such as verbal cues or landmarks to recognize a bus stop, physical prompts such as a tap on the shoulder or placing a trainees hand on a stop signal, gestures such as a nod of the head, eye contact or pointing, and role playing to help problem solve an event that might happen. Once the skills have been learned, the training focuses on monitoring progress on a declining basis (described as "fading") where the trainer provides less instruction so the trainee acquires the needed independence; shadowing, where the trainer follows without being seen and the trainee completes the trip independently; independent travel, where the trainer is not along on the trip; and follow-up contacts at 1 week, 1 month, 3 months, and annual intervals.

## Travel Training Program Outcomes

Successful travel training programs generate significant benefits. The kinds of benefits created by travel training programs can be best understood as benefits for older adult travelers, persons who provide care for older adults, local transportation services, and communities. Some of the benefits are immediate and some are long term.

### Benefits for Older Travelers

Travel training can provide significant benefits for older adults. Travel training can change the entire demeanor of participants by expanding their options for getting around, thereby increasing their independence, spontaneity, and quality of life. Travel training can increase trip-making for older adults allowing them to get to the places they both need

to go and want to go, leading to enhanced mobility. Travel training can also improve the characteristics of travel, such as not needing to make advance reservations, having less dependence on paratransit and family or friends for rides, and providing the ability to use more transportation options. In the longer term, travel training can improve quality of life by allowing greater flexibility in making decisions about aging in place in their own homes and traveling spontaneously according to individual needs or desires. Travel training can enhance personal development and reduce anxiety by providing more control over one's own activities and schedule. Social connectedness is very important for an older adult's well-being, and travel training can provide an opportunity for people to become more fully engaged in the community.

Via Mobility Services in Boulder, Colorado, reported that, for the participants who reported having used public transit since they completed their training, 46% reported they get out more than they did prior to training, 60% reported that they are less dependent on family and friends for rides, and 26% reported less dependence on paratransit. A total of 67% of all respondents reported more choices of places they could go, and 80% reported greater flexibility with their times of travel.

RideWise, TriMet, and Via Mobility Services staff see travel training as life affirming. According to Paratransit, Inc., travel training is a valuable program because one can see how the independence to get around changes the participants' personalities for the better. According to Via Mobility Services travel trainers, travel training can change the entire demeanor of the participants by expanding their options for getting around, thereby increasing their independence, spontaneity, and quality of life. Several program staff emphasized that the most compelling evidence of success comes from individuals' personal stories about how their quality of life has been impacted by the program.

Based on the follow-up calls, 75% of NJTIP's graduates continued to travel by fixed route buses and trains in the year after graduation. Graduates used regular bus and train routes three times more often than they used paratransit. Historical data maintained by Paratransit showed that between 80% and 92% of travel training graduates were successfully using the fixed route system 3 months after completion of the training. According to NJTIP, per capita transit trips prior to travel training averaged 97 trips a year. After graduation, participants took 414 trips per capita.

Travel training can also provide economic benefits to individuals, but a number of these benefits have not been quantified at this time. Many short-run benefits are easily quantified. For example, travel training can lower costs for trips because fares for buses and rail systems are about one-half the price of ADA-eligible paratransit trips (or sometimes even lower). Greater accessibility should increase one's ability for more

cost-effective purchasing. It is the long-run benefits that are not so easily quantified. Over the long term, travel training helps individuals stay mobile and connected with the community. Increased access to health care can lead to health care savings and increased quality of life (Hughes-Cromwick et al., 2005). This increased health status supports more aging in place which, combined with community-based long-term care services, can lead to reduced or deferred nursing home costs (Kaye et al., 2009). Such economic benefits can be quite significant.

### Benefits to Caregivers

Recent studies have found that more than 90% of unpaid, informal caregivers for older adults provide some form of transportation assistance, usually by driving the older drivers to destinations (Eby et al., 2011). Informal caregiving has been linked to poorer health and economic hardship among caregivers (for example, see Classen et al., 2011). Travel training has the potential to ease caregiver burden, by allowing at least some of these trips to be made by bus or rail freeing up the informal caregiver for other activities while at the same time saving resources that would otherwise be spent on caring for an older adult.

The Kennedy Center noted that some family members/caregivers have expressed concern for the safety and physical limitations of older family members using fixed route transit services. Travel training is one way to alleviate these concerns. Many model programs involve the family in individual assessments, intake interviews, and developing customized training in order to best meet the needs of trainees and involve family members in the post-training follow-ups to determine if mobility needs are still being met. Model program representatives believe that family members and caregivers value this input and appreciate the benefits of keeping older adults mobile.

### Benefits for the Community

In the most general sense, travel training programs can be an essential component of a healthy community. Communities in which older adults are unable to meet all of their transportation needs are faced with greater health care costs and a general lowering of quality of life. Research shows that when people lose mobility, they are more likely to reduce spending due to a lack of access to goods and services (Kim and Richardson, 2006). Travel training can help meet these mobility needs among older adults, which in turn helps the entire community.

All of the model programs believed that they provided vital services to the communities in which they were located and that they tailored these services to the unique character-

istics of their communities. One measure of the benefits to the community is the length of the waiting list for training programs. For example, RTA's one-on-one Trip Training program has a 3- to 4-month waiting list.

### Benefits for Public Transit Agencies

The benefits of travel training for transit providers can be substantial. ADA paratransit services are considerably more expensive for public transit agencies to provide than fixed route transit. According to the U.S. Government Accountability Office (GAO) (2012), the average paratransit trip costs \$29.30; the average fixed route trip costs \$8.15; the average number of ADA paratransit trips provided by a transit agency increased by 7% from 2007 to 2010; and the average cost of providing an ADA paratransit trip increased 10% during that time period. Costs for ADA paratransit services are growing faster than are costs for fixed route services: in the San Francisco Bay Area, for all transit operators reporting to the National Transit Database from 2000 to 2009, the cost per trip for demand response/ADA paratransit increased by 82%. This was a significantly greater increase than experienced for fixed route bus service, which saw a 56% increase over the same time period (Koffman et al., 2011). For transit providers that can use the excess capacity typically available in non-rush hour situations on their transit services at essentially no additional marginal costs, there can be substantial cost savings to the transit agency. Even slowing, if not reducing, the growth in ADA paratransit services can be beneficial for transit agencies.

Most travel trainers emphasized that the purpose of the training is to increase the number of travel options available to people rather than to "get them off paratransit." Travel training can benefit transit agencies by increasing the use of public transit and contributing to a mobility options philosophy (providing people with more options). Some trainees reported informally that they used both paratransit and public transit after completing the training, depending on the purpose of trips and conditions under which they were undertaken. Mobility training benefits transit providers because it encourages the use of the most appropriate and cost-effective transit options for all riders. A training program not only saves transit dollars, it also creates more space on paratransit vehicles for riders who have no other transit options.

There are reports of significant cost savings or cost avoidance for transit agencies from the implementation of travel training programs. Transit agencies have discovered that mobility training costs are small when compared to the costs of ADA transit service, which can make the potential for savings substantial. Because differing methodologies have been applied in making these estimates, some caution in accepting these claims is appropriate.

- RideWise conservatively calculates its program benefits as a 3 to 1 ratio of benefits to costs over a 1-year period, but they are not calculating the long-term benefits of travel training, only the benefits over the first year that a trainee is using transit. The RideWise travel training program has saved money for TriMet and has slowed the growth of TriMet's ADA paratransit services.
- Paratransit, Inc. calculated that shifting just one paratransit user (who travels to work or to a program 5 days a week) to regular fixed route public transit can create a cost savings to an agency of more than \$7,000 per year. Training one person each month to be transit independent can thus provide cost savings of more than \$80,000 a year. Average cost savings for seniors are likely to be lower than this because older adults are not frequently traveling to work or to other 5-day-per-week destinations. From December 1981 to September 2012, Paratransit, Inc. trained 12,030 people, including persons with disabilities and older adults. The cost avoidance over the last 17 years in Sacramento has been calculated to be \$20,588,458.
- A study for NJTIP @ Rutgers calculated annual trips for each graduate, along with trip purpose, mode, revenue, cost, and savings per graduate. The study reached the following conclusions:
  - NJTIP increased transit ridership by more than 62,000 trips in 2011.
  - NJTIP increased NJ TRANSIT's farebox revenue by \$92,432 and resulted in \$141,449 in savings in paratransit costs, for an overall return of \$233,881 annually. NJTIP thus covered its \$200,000 travel training annual expenses and had a positive return of 17%.
  - Return on investment should increase annually as the number of graduates increases.
  - NJTIP improves the economy by allowing trained disabled residents to travel to work and other locations. Total per capita transit trips increased from 97 to 414 for NJTIP graduates, an increase of over 400%. (It is unlikely that seniors had as many trips as other individuals with disabilities since many seniors could be retired and therefore would not have work-related commuting trips included in their results.)
- A special report on Washington, D.C. Metro's Eligibility Certification Travel Training and Transit Options Program estimated possible savings of \$1.5 million in FY 2011–12 from the travel training program for persons with disabilities and older adults. The D.C. Metro's survey of 183 individuals receiving the one-on-one training found that 90% reported an increase in fixed route transit use (primarily bus use but also some rail use) and only 10% reported no change.
- King County Metro (Seattle, Washington) reported spending about \$573,000 in 2011 to provide travel training to over 300 individuals, but estimated it saved about \$1,290,000 in

paratransit costs by successfully transitioning paratransit patrons to the fixed route system (Koffman et al., 2011).

## Summary of Benefits

Successful travel training programs generate significant benefits. The most obvious kinds of benefits created by travel training programs are benefits for older adult travelers and the local transportation services. Some of the benefits are immediate and some are long term.

### *Benefits for Older Travelers*

Travel training provides numerous benefits for older adults. It can do the following:

- Expand their travel options.
- Increase their trip-making, leading to enhanced mobility.
- Provide improved travel attributes, such as no need to make advance reservations, less dependence on paratransit, and less dependence on family and friends for rides.
- Offer quality of life improvements, such as increased social connections, aging in place in their own homes, or traveling spontaneously, according to individual needs or desires.
- Enhance personal development, reduce anxiety, provide more control over one's own activities and schedule.
- Improve social connectedness, helping people become active community members.
- Provide economic benefits:
  - Fixed route public transportation costs are generally lower than most other travel alternatives, including ADA paratransit services. In most communities, older adults enjoy half-price fares on public bus and rail systems at least at some times during the day, versus as much as two times the regular fixed route fare for ADA-eligible paratransit rides.
  - Increased access to health care should improve health status and lead to lower long-term care costs.
  - Increased mobility supports aging in place, which can help to avoid or defer the costs of nursing homes.

### *Benefits for Public Transit Agencies*

The benefits of travel training for transit providers can be substantial.

- Because ADA paratransit services are considerably more expensive for public transit agencies to provide than fixed route transit, there can be substantial cost savings to the transit agency if travel training can encourage potential paratransit riders to use fixed route services instead. Even slowing, if not reducing, the growth in ADA paratransit services can be a beneficial cost avoidance strategy for transit agencies.

- Most travel trainers interviewed emphasized that the purpose of the training is to increase the number of travel options available to people rather than to “get them off paratransit.” Travel training can benefit transit agencies by increasing the use of public transit and contributing to a mobility options philosophy (providing people with more options). Some participants reported informally that they used both paratransit and public transit after completing the training, depending on the purpose of trips and conditions under which they were undertaken.
  - Travel training benefits transit providers since it encourages the use of the most appropriate and cost-effective transit options.
  - A training program not only saves transit dollars, it also creates more space on paratransit vehicles for riders who have no other transit options.
  - Travel training can build good will in the community for public transit:
    - The emphasis on cost control makes transit’s funders happy.
    - Travel training builds good will for transit’s consumers by showing that the agency cares about their needs.
- It is important to recognize that some of the benefits occur upon completion of training, while others take time to emerge and others yet are of a long-term nature.
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## CHAPTER 3

# Characteristics of Successful Travel Training Programs

## The Attributes of Successful Travel Training

Key characteristics of successful travel training programs for older adults include at least the following elements:

- Success means demonstrating that older adults who have completed travel training programs have already experienced (or are quite likely to experience) measurable mobility improvements. This means that they now have the skills to travel independently more often and to access more destinations within a reasonable level of expense.
- Success means that the travel training programs are targeting and graduating at least some people who might otherwise be expected to face significant mobility problems (such as, for example, gradually losing their ability to drive and losing their access and mobility).
- Success means that there are demonstrably positive outcomes for local transportation services: for example, ridership on fixed routes has increased; ridership on ADA paratransit has not increased to the extent otherwise expected without the travel training programs; seniors make greater use of other mobility options; and the cost of providing the training is reasonable for the benefits received.
- Success means that the program keeps accurate records of its costs, activities, and results to better meet its goals and manage its operations, create a constant improvement cycle leading to greater cost effectiveness, and demonstrate results to key stakeholders.
- Success means that the travel training program is able to generate support that can sustain its activities over an extended period of time.

This chapter takes an in-depth look at some of the attributes of successful programs using the seven in-depth case studies as information sources.

## Components of Successful Travel Training Programs

What's special and unique about successful programs? It appears that, to be successful, a travel training program must include competencies in a full range of travel training services, including outreach, training of trainers, training of individuals, and other programs to meet constituents' needs. Successful travel training programs often focus on the following principles and attributes, while taking advantage of unique factors in their communities:

- Developing an overall program philosophy.
- Tailoring travel training to individual needs.
- Tailoring travel training to the local community.
- Hiring travel trainers with the right personal qualities.
- Providing strong organizational and management leadership and support.
- Building and maintaining flexible, collaborative relationships.
- Involving and recognizing volunteers.
- Evaluating travel training outcomes.
- Realizing the benefits of technology.
- Identifying and retaining funding sources.

The following pages discuss these factors and offer some examples of how they have been applied by some successful programs.

### Developing an Overall Program Philosophy and Mission

As noted earlier, most travel trainers emphasized that the purpose of the training is to increase the number of travel options available to people rather than to “get them off paratransit.” Travel training can benefit transit agencies by increasing the use of public transit and contributing to a mobility options philosophy (providing people with more options).

Some participants reported informally that they used both paratransit and public transit after completing the training, depending on the purpose of trips and conditions under which they were undertaken. Mobility training benefits transit providers since it encourages the use of the most appropriate and cost-effective transit options for all riders.

Ride Connection believes that a key to the success of its RideWise travel training program is its focus, in numerous ways, on creating a core philosophy and delivering a clear and consistent message to all members of the community. One component of this messaging is its focus on “building trust in the most respectful way,” both with its travel training customers and with its partners. A manifestation of this is the practice of treating all trainees as “customers,” not “clients” or “students.” The focus on individuals as customers is a key component of Ride Connection’s practice of mobility management, and this includes attention to the feelings of the customers, which may include attention to concepts of dignity and fears of losing independence. It is vital to understand each person, his or her skill sets and other resources, and his or her travel needs. There is no typical training experience; Ride Connection’s program is highly flexible and highly tailored to specific individuals.

### **Tailoring Travel Training to Individual Needs**

While there are many older adults who do not need individualized training to fulfill their travel needs, the most successful training programs provide the possibility of highly tailored one-on-one training. The initial step in meeting individual needs is to explore available transportation options with new customers based on that customer’s specific needs, ability level, proximity to transit, as well as their wishes and transportation goals. An appointment with the customer in his or her own home for an initial interview is a data-intensive means of starting a training program because of the insights it offers. If the decision is made to provide individualized training, other key steps include the travel trainer scouting preferred walking and riding travel routes and establishing an individualized training plan that may vary in length and intensity depending upon the individual’s response to the training program.

For example, Via Mobility’s one-on-one training is customized to the individual being trained. It includes an in-home mobility skills assessment, pre-trip planning, and hands-on travel training. Customization is based on an initial in-home assessment, completion of a training progress checklist during the training process, and a mobility training summary completed by the trainer upon training completion. Follow-up surveys are also conducted with participants. Riverside’s Freedom to Go travel training program has three full-time travel trainers. Each of the travel trainers focuses on different

segments of the population, with one of the three trainers focused on older adults.

### **Tailoring Travel Training to Your Local Community**

It is extremely important to tailor travel training efforts to the persons and resources in the local community. Understanding the local culture of senior citizens is vital, as is a complete and thorough inventory of local transportation services. Key factors include the local culture, resources, and spatial distribution of destinations. Understanding these factors is considered a key part of any successful travel training program.

### **Hiring Travel Trainers with the Right Personal Qualities**

A competent staff that excels in customer service is a key to program success. A common theme voiced by travel training staff was that the personal qualities of trainers are often more important than job experience or background, although several programs have had substantial success employing trainers with a social services background. The travel trainers must enjoy working with people, and they must be confident in what they do. Trainers must be able to connect with participants. Personal traits of trainers such as empathy, likability, respect, patience, and kindness are central to this ability. Trainer credibility was also seen to be enhanced when the trainer was an actual transit user. Critical thinking was considered to be important to trainer effectiveness, and having established relationships in the transportation community was considered a bonus. The travel trainers not only teach how to get on and off public transportation, they also teach safety practices and support confidence development in the riders, thereby encouraging them to continue to ride public transportation. Trainers must be flexible, resilient, and calm, as they often encounter unexpected changes in the real-world training environment.

### **Providing Strong Organizational and Management Leadership and Support**

The person leading the program makes a significant difference. A dynamic leader with strong interpersonal skills, a passion for this kind of work, and expertise in areas important to the populations served—including aging and disabilities—can make a program quite successful. This person plays a central role in building and sustaining relationships with key organizational stakeholders in the community, as well as working directly with program participants.

NJTIP @ Rutgers’ Connect to Transit Training Program teaches professionals and volunteers from social services

agencies, schools, and senior residences how to become informed advocates for public transportation, so they can better assist their clients, students, and residents with navigating the public transportation network. The seminars are specifically geared to using NJ TRANSIT bus and rail systems. The Connect to Transit Training Program may benefit seniors to the extent that human services and community services professionals who work with seniors may participate in the training, become more informed about public transportation and the availability of travel training, and become more willing to recommend travel training to seniors with whom they work.

### **Building and Maintaining Flexible, Collaborative Relationships**

As might be expected, all of the case study programs are heavily dependent on partnerships to support their travel training activities. Key partners include transit agencies that are not only a primary funding source, but also provide referrals to clients who either may not be eligible for ADA paratransit services or who transit agency staff think might benefit from using a mix of fixed route travel and ADA paratransit, as appropriate. Transit agencies also offer fixed routes to provide flexibility and lower cost alternatives when appropriate.

Human and social services agencies that provide services to individuals with disabilities or special travel needs serve a key role by providing referrals and developing travel training programs to assist their constituencies. Senior centers and senior housing complexes, especially those that are subsidized by the U.S. Department of Housing and Urban Development are key partners, particularly for group travel training. Hospitals are also key partners at some sites. Several programs, as described above, offer training to staff and volunteers in partnering agencies to make them aware of fixed route transit options and the potential benefits of travel training for their clients. Word of mouth referrals are considered important.

Programs need to be flexible so that they take advantage of opportunities that arise in the community, as well as being responsive to the changing needs of the populations they serve. Such relationships are critical to the success of the program because of the opportunity they afford to leverage resources as well as continue to bring people in need into the program. These relationships are the necessary starting point for trust, something that is central to program success.

Typical program partners include the local public transit authority, adult and senior centers, mental health clinics, health care providers, community centers, health and rehabilitation centers, independent living resource centers, denominational community organizations, private taxi services, private transportation providers, and other community organizations.

In Portland, Ride Connection has extremely strong support from TriMet, the local public transit authority. Ride Connection started the RideWise program in 2004 as a result of an internal review at TriMet. Ride Connection has developed partnerships with more than 30 separate partner agencies in the area, including adult and senior centers, mental health clinics, health care providers, and others. *The Rider's Voice* is a book featuring the stories of 25 new independent travelers and advocates who have shared in the RideWise experience. This book, whose development was paid for by TriMet, includes stories that are first-person accounts of what it means to travel independently and to move about the community with purpose and without harm. Both Ride Connection and TriMet have successfully used this book to educate their Boards of Directors and various members of the community about the benefits of improving mobility for seniors and other individuals who might need travel training or other support to become more independent in their use of travel options.

Paratransit, Inc. works with the community to make sure that the travel training program is a success. It has created working relationships with senior communities, senior programs, and with senior centers in the Sacramento area. The travel training program typically visits the senior complexes once a year to promote travel training. If requested, Paratransit, Inc. will return to a senior complex more than once a year if the complex experiences a high turnover rate of residents; if they are not asked, they will ask to come back in a year.

NJTIP @ Rutgers' partnerships with NJ TRANSIT, the towns in the seven-county service area, and social services agencies that work with seniors are continuing to provide forums for NJTIP to provide travel training to seniors. NJTIP's ability to ensure its sustainability by negotiating to become part of the Voorhees Center at Rutgers University is evidence of sound fiscal and educational practices and an endorsement of the program's potential.

One of the reasons that The Kennedy Center has been successful is that it has worked effectively with the many transit districts within the state, particularly those in the southwest part of Connecticut and the larger urban transit districts. Its methods have been effective in training individuals, as recognized by feedback from participants to referring agencies and TKC, and as demonstrated by its continued success in being awarded statewide grant funding.

### **Involving and Recognizing Volunteers**

Volunteers can play a critical role in reaching out to the wider community, especially when resources are scarce. Paratransit, Via Mobility, and Ride Connection make substantial use of volunteers. RideWise and its partners also see significant benefits accruing to the volunteers who are involved in the

program. Partner agencies report high levels of satisfaction among the volunteers who work with the RideWise program. The peer-to-peer volunteer model was seen as an important component of a successful program.

## Evaluating Travel Training Outcomes

Evaluating travel training outcomes clearly requires detailed records of costs and benefits. Transit agencies have discovered that mobility training costs are small when compared to the costs of ADA transit service, which can make the potential for savings substantial:

- In Sacramento, Paratransit, Inc. calculated the cost avoidance over the last 17 years to be \$20,588,458.
- In Portland, the RideWise program conservatively estimates its program benefits as a 3 to 1 ratio of benefits to costs over a 1-year period.

At the same time, RideWise believes that one “cannot measure program success solely by ADA cost avoidance.” In Sacramento, travel training is considered to be a valuable program because the trainers can see how the increasing independence in the ability to get around changes the participants’ personalities for the better. In Boulder, program staff members noted that the most compelling evidence of success comes from individuals’ personal stories about how their quality of life has been enhanced.

More information on program benefits was earlier presented in the “Travel Training Program Outcomes” section of Chapter 2.

## Realizing the Benefits of Technology

Riverside provides an example of how farebox technology can be used to track ridership and demonstrate the results of its travel training program. Free fares on fixed route public transportation service are provided to those persons who have received travel training. This enables RTA to use recording farebox technology to measure and evaluate use of fixed route service after travel training has been completed. For people with disabilities using paratransit service, RTA provides a monthly pass on a continuing basis for those who complete travel training and use fixed route service for their travel. For older adults not eligible for ADA paratransit service, RTA introduces them to travel training in a group session and selects one senior from a group to be their travel training advocate to encourage other seniors in the group to travel. The senior advocate receives a monthly pass for his or her use as seniors in the group complete travel training. Each senior who completes the training receives a monthly pass good for 1 month.

RTA uses its recording farebox technology to track the fixed route travel, on a trainee by trainee basis, by seniors and people with disabilities who use their monthly pass to ride. If RTA observes that use of fixed route service has stopped or declined, travel trainers will check back with the riders to understand why their use has declined. Refresher training will be offered and completed to restore use of fixed route service.

## Identifying and Retaining Funding and Other Resources

Most of the case study programs serve both individuals with disabilities, seniors with disabilities, and often serve seniors who may not have a disability. In many cases, ADA-eligible individuals are a major group of trainees, in part because many programs have depended on New Freedom grant funding that is passed through their state governments to facilitate travel training. Most programs are dependent on a few but highly focused funding sources, including state departments of transportation, state transit agencies, or local government agencies. The budgets for the seven case study programs range from a bit more than \$200,000 (Riverside) to \$855,000 (the RTA in Chicago).

Via Mobility Services provides travel training services with funding from Boulder County, the city of Boulder, the Denver Regional Mobility and Access Council (DRMAC), the Regional Transportation District (RTD), the United Way, and the Rose Foundation. Many of these latter sources provide funds to the overall Via Mobility Services, which then allocates them among its many programs.

Revenues for Paratransit’s program in Sacramento come from vendor agreements with the Alta California Regional Center (ACRC) and the California State Department of Rehabilitation (DOR). The ACRC and DOR pay an hourly rate for training their clients. Additional funding came from a New Freedom grant, a Job Access Reverse Commute (JARC) grant, and from the South Area Transportation Management Association (TMA). Also, Paratransit, under the name Innovative Paradigms, provides consulting services and travel training program management for other agencies to bring in additional revenue for the agency and the local program.

Paratransit, Via Mobility, and Ride Connection make substantial use of volunteers. Ride Connection in Portland uses 40 volunteers who contribute almost 1,300 hours a year leading group trips, co-presenting senior training, serving as transit advocates, or participating as work group members.

## Key Features of Successful Programs

Most programs, including travel training programs, can be described by their components. A typical program description would include **program focus, program development,**

### partnership development, staff, program operations, outreach, and monitoring and evaluation.

Based on the research conducted for the case studies, some details of these components are typically as follows:

- **Program focus:** Tailor training to individual needs and capabilities. Focus on customer service.
- **Program development:** Provide a program that reflects local community transportation resources. Develop the training program with inputs from audiences and providers.
- **Partnership development:** Partner with key community stakeholders. Get community stakeholders invested in travel training. Be able to work with a variety of community partners. Develop strong support of the local public transit agency. Obtain internal organizational support from your parent organization.
- **Staff:** Hire travel training staff based on personal qualifications (compassion, understanding the value of travel training), including social services experience, not academic qualifications. Focus on “people skills.” Depth of staff experience is important.
- **Program operations:** Obtain sustainable funding. Integrate travel training information into agency marketing and branding efforts. Market the program through educational outreach. Assess each specific individual’s or group’s needs and capabilities. Do initial individual assessments in the homes of potential trainees. Develop forms and procedures that are written and replicable. Target group training to high-volume residential/work locations.
- **Outreach:** Look beyond ADA for trainees and benefits: reach out to more than ADA-eligible travel training candidates. Include older adults, not just ADA-eligible trainees.
- **Monitoring and evaluation:** Continually monitor and analyze program impacts. Follow-up over time to document results and offer more training if needed. Have a performance measurement system to evaluate “success.”

From one perspective, all of these components are keys to successful programs. Each of these categories represents an important facet of travel training, but some elements stand out as a bit more important than others. Based on information from the case studies and analyses by the research team, the following travel training program components seem to deserve great attention:

- **Hiring travel training staff based on personal qualifications** (like compassion and understanding the value of travel training), social services experience, and depth of experience; “people skills” are most important.
- **Tailoring training to individual needs and capabilities.** Focusing on customer service.

- **Obtaining sustainable funding.**
- **Partnering with key community stakeholders.**
- **Continually monitoring and analyzing program impacts.** Following up over time to document results and to offer more training if needed. Developing a performance measurement system to evaluate program success. Documenting the quantitative and qualitative results with regular program reports.
- **Integrating travel training into agency marketing and branding efforts;** marketing the program through educational outreach, especially to program partners.

## Finding the Right Combination of Factors

While all of the above elements are vital, real success depends upon the ability to put together a package that responds to the unique resources and challenges of each locality. Each of the case study sites developed their own combination for progress, as shown in these examples.

- In Boulder, Via Mobility attributes the success of its programs to the following principles and attributes: personal qualities of the trainers, strong leadership, consideration of the larger context, recognizing and appreciating volunteers, building and maintaining collaborative relationships, responsiveness to changing community needs and funding sources, and competencies in a full range of travel training services.
- Chicago’s RTA believes that the following factors seem to be important: all but one of the travel trainers come from a social services background; the other trainer comes from a rehabilitation background; the RTA Board is supportive; the one-on-one training is very intensive; and the work is done in-house with RTA employees, which makes management of their program easier for them.
- The NJTIP @ Rutgers program is successful, in part, because it demonstrated that an existing program from The Kennedy Center, Inc. could be adapted for use by another jurisdiction. Also, NJTIP’s partnerships with NJ TRANSIT, the towns in the seven-county service area, and social services agencies that work with seniors are continuing to provide forums for NJTIP to provide travel training to seniors. While the change in management could have been a challenge, the stability of Rutgers University as an operational base is thought by both NJTIP and the Voorhees Center to be an asset.
- Ride Connection believes that a key to the success of their RideWise travel training program is creating a core philosophy and delivering a clear and consistent message to all members of the community. The focus on individuals as customers is a key component of their practice of mobility

management; this includes attention to the feelings of the customers and understanding each person, their skill sets and other resources, and their travel needs. A competent staff that excels in customer service is a key to program success, as is increasing the mobility of potential riders. There are substantial benefits of allowing older adults to age in place, and avoiding the costs of nursing homes is certainly a primary benefit. RideWise reports a positive ratio of benefits to costs over a 1-year period and has demonstrated to TriMet that there is a productivity improvement attributable to its program that has saved money for TriMet and has slowed the growth of TriMet's ADA services. TriMet has created spreadsheets to conduct detailed calculations about the benefits of the RideWise travel training program, and considers travel training to be highly cost effective.

- In Riverside, a key reason for success is strong organizational support. RTA management started the travel training program slowly and took time to recruit and hire the right people: the hiring process was not focused on academic qualifications but on personal qualities such as heart and compassion. The three travel trainers work very well as a team and meet regularly with ADA paratransit staff.
- Paratransit, Inc. has successfully operated the travel training program in Sacramento for the past 30 years. The travel training program has been able to demonstrate considerable cost savings over this time. The amount of money for travel training has varied from year to year, but Paratransit's Travel Training Program is designed to be scalable based on the funding that is available from year to year.
- TKC believes that one of the reasons that TKC has been successful is that it has worked effectively with the many transit districts within the state, particularly those in the southwest part of Connecticut and the larger urban transit districts. TKC's success is also demonstrated by the desire of other northeastern organizations to receive "Train the Trainer" and senior travel training consulting services. TKC provides customized consulting services to help other transit agencies get started and sells three resource guides that can be used by other entities to promote senior travel training.

## Suggestions for Improved Practices

As noted, travel training is a relatively new profession. Current industry shortcomings focus on a lack of applying definitional standards to training practices and program inputs, outputs, and outcomes, and the lack of data that conclusively link specific travel training techniques or models to specific outcomes.

- Available definitions for types of training (for example, one-on-one, group training, and orientations) are not rigorously applied in all practices.

- An agreed-upon methodology for calculating benefits and costs is not available at this time. The literature contains a little information about calculating benefits and costs that has a methodological focus but does not have data associated with it.
- Benefits are not precisely defined for the travel training industry at this point in time.
- Information that is currently available is almost exclusively focused on the impacts of one-on-one training and on short-term benefits to the exclusion of long-term benefits. These practices lead to a significant understatement of actual benefits.
- Among the significant methodological issues in defining benefits and costs is the fact that the costs of travel training are often incurred immediately while the benefits are realized over a longer period of time.

With some of the basic procedures and practices now established, the industry needs to focus its attention on measuring its costs, benefits, and successes and transmitting that information to its sponsors and other stakeholders. In particular, travel training programs need to undertake the following:

- **Create, distribute, and adhere to common definitions of training activities, inputs, outputs, and outcomes.**
- **Improve documentation of benefits** to program participants, family members and caregivers, funding partners, and the community.
- **Improve documentation of program costs and benefits for all costs incurred** across target audiences and across training components (such as one-on-one training and group training) to better understand the costs and benefits of various training approaches and components.
- **Compare costs and benefits to improve program cost effectiveness.**
- **Implement processes to collect data** to create information that can provide feedback on key program elements—goals, objectives, resource allocations, and more—into training program improvements in a continuous improvement cycle.
- **Find ways to make better use of volunteers.**
- **Broaden the depth and breadth of funding commitments.**
- **Implement processes to collect data** from travel training programs that transit providers can use to improve the services that they offer to older adults and others.

Strategies to accomplish at least some of these objectives follow:

- **Develop more precise statements and measures of vision, mission, goals, and objectives.** Focus the goals and objectives on reasonable expectations of what can be achieved

in terms of outputs and outcomes of training activities. Disseminate this information to key stakeholders.

- **Adopt and apply industrywide standards for instructional activities for all travel training programs.** Areas that could benefit from greater standardization include items such as instructional approaches, personal assessments, training plans, training models, and proficiency assessments for program completion.
- **Adopt and apply industrywide standards of fully allocated cost accounting principles and performance measures for all travel training programs.** Industrywide standards are needed for common charts of accounts to record all costs incurred. Similarly, the industry needs agreed-upon standards for measuring program outputs, outcomes, and benefits.
- **Enhance monitoring and follow-up activities.** Follow training program graduates for more than 1 year to better assess the long-term impacts of training. Collect information on the differences that travel training made in the lives of all participants, including those contacted in group settings,

not just those who completed one-on-one training. The results can be used in funding justifications and accountability reports to funders and service providers that refer clients to the program. Document the impacts that travel training makes in the lives of the trainees and distribute this information widely.

- **Use group orientations as a recruitment tool** for further group and one-on-one training sessions.
  - **Obtain commitments** from Boards of Directors and management staff to the program's vision and then to adequate funding for the training program. Detailed information about program costs and benefits will substantially enhance this effort.
  - **Convene a national program leadership conference.** The travel training industry would benefit from opportunities for leaders of programs (as opposed to individual travel trainers) to interact, share lessons learned, and consider strategies to address specific challenges. The conference could focus on identifying travel training program challenges and best practice solutions.
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## CHAPTER 4

# In-Depth Case Studies

As previously noted, an extensive search for travel training programs was conducted as part of the initial activities of this project. The sources for this search included previous literature, expert advice, contacts of the research team, and an Internet search that focused on terms such as travel training, transit training, mobility training, transportation training, travel instruction, and transit instruction.

A ranking process was developed to identify candidates for detailed case studies that would include site visits to selected sites. The ranking process used 13 factors that the project team considered to be indicative of high quality programs based on earlier research and the experience of the team in consulting with transit and social services agencies serving the target audience. These criteria included factors such as the following:

- Willingness to provide public information.
- Availability of complete program details.
- Primary focus on older adults as a target audience.
- Participant data available to assess the program.
- Before and after assessment to determine consumer needs and learning progress.
- Measures of success used to draw conclusions about the success of the program, including results for consumers.

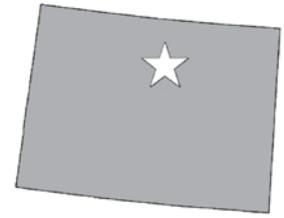
Full details about the selection process are included in Chapter 1.

There are many fine travel training programs for older adults. Based on the total scores for the 13 factors, seven travel training programs were selected as programs that would most likely yield important information on travel training programs for older adults. These seven programs, described in detail on the following pages, received substantially higher scores than any of the other potential case study candidates.

- Via Mobility Services                      Boulder, Colorado
- Regional Transportation Authority (RTA)                      Chicago, Illinois
- New Jersey Travel Independence Project (NJ TIP @ Rutgers)                      New Brunswick, New Jersey
- Ride Connection                      Portland, Oregon
- Riverside Transit Agency                      Riverside, California
- Paratransit, Inc.                      Sacramento, California
- The Kennedy Center, Inc.                      Trumbull, Connecticut

# VIA MOBILITY SERVICES TRAVEL TRAINING PROGRAM

## VIA MOBILITY SERVICES BOULDER, COLORADO



<b>Program Name</b>	<b>Via Mobility Services Travel Training Program</b>
<b>Date Established</b>	2003
<b>Sponsoring Organization</b>	Via Mobility Services
<b>Organization Type</b>	Private nonprofit corporation
<b>City, State</b>	Boulder, CO
<b>Persons Trained</b>	Seniors, people with disabilities, low income individuals
<b>Service Area</b>	Boulder County and City of Denver, CO
<b>Service Area Population</b>	2,894,071
<b>Service Area Size (Sq Mi)</b>	9,165
<b>Data for Year Ending</b>	2012
<b>Seniors Trained per Year</b>	168 (38 in one-on-one and 130 in group training)
<b>Annual Training Expenses</b>	\$145,037 (salaries, fringes, supplies, outreach, other expenses)
<b>Cost per Senior Trained</b>	Estimates are \$1,500 for one-on-one training and \$22 for group training
<b>Major Funding Sources</b>	Boulder County, City of Boulder, Denver Regional Mobility and Access Council (DRMAC), Regional Transportation District (RTD), Rose Foundation
<b>Partnering Agencies</b>	DRMAC
<b>Key or Unique Factors</b>	Comprehensive set of travel training services

### Organizational Background

Via Mobility Services Travel Training Program is part of Via Mobility Services, a nonprofit community organization in Boulder, Colorado, whose mission is “to promote independence and self-sufficiency for people with limited mobility by providing caring, customer-focused transportation options.” The Travel Training Program offers individual and group travel training to older adults, people with disabilities, and low income individuals to give them the skills to safely and confidently use the public transportation system in Boulder County.

### Program Start-Up

The program evolved from earlier more informal efforts in the city of Boulder, with program growth in response to identified unmet needs for travel training among older adults and people with disabilities. Initial funding for the

program came from the Rose Foundation and federal government sources (e.g., New Freedom Funds). Via Mobility Services, which offers paratransit and other mobility services, provided the infrastructure and other resources for the program. The program represented an opportunity to meet a growing unmet need for travel training services in the Boulder area. To a great extent, this opportunity was seen as being able to expand the mobility choices for people, some of whom were already using paratransit but capable of and interested in using more spontaneous forms of transportation (e.g., those not requiring 7-day advance scheduling). One challenge was having sufficient organizational support and resources from a variety of sources to sustain program efforts and grow beyond a relatively small scope. The lack of strong advocates for the target population was considered to be one barrier to growing the program. Current efforts focus on promoting the program among key stakeholder groups through advisory committees and other strategies.

## Program Operations

### Program Description

The Via Mobility Services Travel Training Program contains several components. The Easy Rider Travel Training Program (ERP) provides one-on-one travel training, as well as group travel training (Seniors on the Move), community presentations, the Transit Ambassador program, and community collaborations. Seniors on the Move is a group travel training program targeted to older adults. The program has two components: a classroom presentation on basic public transit orientation followed by an outing on a fixed route bus. The outing is generally to a specific location/activity (e.g., museum, shopping or eating destination), during which a “hands-on” approach is used to discuss how to use public transit. The idea is to offer an enjoyable outing while also teaching people about public transit. The program is targeted to both older adults who do not drive as well as those who still drive but may simply want additional transportation options.

The Get on Board (GOB) program, conducted in partnership with the RTD in Denver, was aimed at people who were already using RTD’s complementary paratransit (Access-a-Ride). RTD contracted with Via Mobility to offer more transportation options to individuals with ADA paratransit certification. The program was halted in late 2012 due to lack of funding. Via recently received a new 2-year contract to begin providing travel training again.

### Resources

Via Mobility reports spending \$145,037 a year on travel training. This figure includes salaries, fringe benefits, supplies, outreach, and other expenses.

From the coordinator’s perspective, there needs to be an overarching organization committed to the program and willing to financially support it; that is Via Mobility Services. In addition, there need to be actual funding sources—these included the Rose Foundation and federal sources of support at the beginning. They now also include funding through the contract with DRMAC and registration fees (\$25/participant but not generally collected), as well as support from the United Way, the city of Boulder, Boulder County, and foundations. Many of these latter sources provide funding to the overall Via Mobility Services, which then allocates them among its many programs. Via Mobility Services also received money from the Colorado Department of Transportation for mobility management but none of it goes to the travel training program. The travel training program had been receiving over \$100,000 per year from its contract with RTD, and with its new contract, that will begin again. In addition, Via’s Travel Training Program recently became a vendor to provide services to the Colorado Department of Vocational Rehabili-

tation and Via has also been awarded federal funding (Section 5310 funds) to create a metro areawide program in 2014. Staffing resources for the travel training program include the coordinator who represents the travel training program as well as the larger organization, as well as two travel trainers, one of whom is Spanish speaking, and a grants/finance person for Via who works on program funding.

### Target Audience

The target audience for the overall Travel Training Program is composed of older adults, people with disabilities, and low income individuals. Recent efforts have also focused on Latino older adults. Most of the participants in the program no longer drive themselves. Many continue to use paratransit as well as public transportation depending on the nature of the trip or the circumstances under which it is being taken. According to program staff, individuals within the target audience who participate in the one-on-one training tend to share certain personality traits such as being open to learning new things, adventurous, highly motivated, and in many cases characterized as “feisty” or “spunky.” Older adults participating in the Seniors on the Move group outings participate for a variety of reasons including wanting specific information about the bus or just wanting to have something to do. In general, individuals who are good one-on-one travel training candidates are considered to be those who want to learn how to ride the bus, have one or a few specific destinations, can learn to follow a routine, can walk or wheel independently to a bus stop, and are able to communicate verbally, in writing, or with a communication device. The extent of program focus on seniors depends on the program component, with Seniors on the Move aimed exclusively at seniors, while other program components target all of the above mentioned segments. Older adults compose about one-third of participants in the ERP.

### Training Content

There are a number of program components:

- **One-on-one travel training (ERP, GOB):** The one-on-one training program includes several components. An in-home mobility skills assessment is conducted to assess hearing, vision, mobility, and cognition. Pre-trip planning is conducted to check the environment for bus stop/sidewalk accessibility, pedestrian crossings, and memorable landmarks. Customized hands-on travel training is provided that includes planning a trip using a route schedule and map, getting to the bus stop and preparing to board, getting on, paying the fare, recognizing landmarks and signaling to get off, transferring from one bus to another, using safe

pedestrian skills and stranger awareness, problem solving such as missed connections, and understanding rights guaranteed by ADA.

- **Group training (Seniors on the Move):** The group training covers several topics including the benefits of public transit (bus and light rail); planning a trip; RTD's trip planning services; fares (local regular and discount, children's, express and regional); using transfers; issues at the bus stop; getting on the correct bus; requesting accommodations; requesting a stop; and disembarking.
- **Volunteer Bus Buddy Program** (through partnership with DRMAC): The training is designed to assist organizations interested in establishing their own in-house program, who have a pool of volunteers to draw on, and want to assist the people they serve in learning how to use public transit. The training includes the following components: skills assessment, an overview of public transit, bus riding basics, overcoming travel barriers, an overview of rights/accommodations, how to plan a trip, disability awareness, fares, light rail, and ongoing support.
- **Train the Trainer Program** (through partnership with DRMAC): This training is designed for organizations that have the staff and financial resources to establish their own in-house travel training program to serve individuals who face significant barriers to using public transit. The training includes the following topics: starting a travel training program; overview of instruction models; disability awareness/first-person language; program documentation; emergency procedures/ADA/Code of Ethics; professional organizations and resources; medications and the impact on travel training; responsibilities and best practices including program documentation (outreach efforts and contacts, trainee assessment and intake, follow-up survey, outcome measures, database management); travel training planning and step-by-step objectives; instruction strategies; skill identification; safety; field training; planning a trip; environmental analysis; and scouting the route prior to training.

### *Program Customization to Meet Audience Needs*

The one-on-one training program is customized in the following way: an initial four-page trainee assessment form is completed in the participant's home, by the trainer; a training progress checklist is completed by the trainer during the training process (with additional forms completed if training requires more than 10 days); and a mobility training summary is completed by the trainer upon training completion. Trainees are assigned to one of three categories in the summary: successful (trainee demonstrates ability to confidently, competently, and safely use public transit independently—with specific destinations identified); conditionally success-

ful (with conditional factors identified); or unsuccessful (trainee did not achieve the necessary skills for travel—with deficiencies identified). Total training hours and days are also recorded, as well as other information (e.g., who referred person, trainer comments, trainee quotes). Follow-up surveys are conducted with participants. The one-on-one training is customized to the individual being trained, while still addressing the general content areas discussed earlier. The group training is customized based on the type and location of the organization or group of participants.

### *Teaching Methods*

- **One-on-one travel training:** Teaching methods for the one-on-one training include a focus on the learning process (e.g., importance of planning and consistency, understanding how learning occurs, identifying trainee learning styles); an in-home assessment; environmental analysis (path of travel, environmental barriers, physical barriers, special considerations for trainees with limited vision or hearing, social barriers, street and intersection crossing); trip planning (select the route taking into consideration destination, pedestrian skills, path of travel, routes/transfers/intersections, time of day, accessibility, frequency of use, season/weather); scouting the route (trainer only); hands-on initial training for bus use (walking to and riding bus, returning home); follow-up hands-on training (generally up to six trips with an average of two or three trips); assessment of basic travel skills (e.g., looking for trainee to demonstrate awareness of personal space and environment, ability to recognize and respond to unsafe conditions); field training strategies (modeling, role playing, verbal cueing/rephrasing, physical prompting, fading, guided discovery, sensory learning); and a follow-up survey.
- **Group training:** The group training involves a field trip on public transit to a specific location/activity (e.g., museum, shopping, or eating destination). Information is provided to participants during the course of the field trip, thus eliminating the need for classroom instruction.
- **Volunteer Bus Buddy Program:** This program involves a full-day hands-on, one-on-one training. Trained volunteers accompany riders and provide them with information and encouragement to build their skills and confidence.
- **Train the Trainer Program:** This program consists of a 2-day comprehensive workshop.

### *Program Partners, Promotion, and Outreach*

Via Mobility Services Travel Training Program partners with DRMAC, the regional transportation coordinating agency, to offer *On the Move!* This program provides travel training programming in the Denver metro area to serve older

adults and people with disabilities. The program consists of a classroom presentation (1 hour) on how to use public transit, followed by group outing on public transit (1 hour) to allow participants to practice what they learned in class. The specific content of the program is very similar to Via's Seniors on the Move program (highlighted earlier). The program originally only worked with organizational staff but has been refocused to work directly with the clients of these organizations because of limited staff availability to participate. DRMAC has a full-time staff person who is able to devote about one-quarter of her time to outreach and following up on all travel training sessions, with help from the agency's transportation research specialist. The partnership between Via and DRMAC has also resulted in the Volunteer Best Buddy Program which trains volunteers from various Denver area organizations to help older adults, people with disabilities, and low income individuals use public transit. Once trained, the volunteers accompany riders on transit to help them build skills and confidence in using public transit. In addition, a Train the Trainer Travel Training Instruction Program is offered which includes an intensive 2-day workshop for people interested in starting a travel instruction program. The workshop addresses issues such as considerations in designing a program, public transit instruction models, respectful communication and etiquette, medications and their effect on training, and issues related to travel training preparation, process, and strategies.

Recently, one of Via's travel training was independently awarded a grant to establish travel training options for Latino older adults in the Denver metro area. The travel trainer will receive a 2-year fellowship through the Colorado Latino Age Wave Initiative (CLAWI) to work with agencies and organizations serving older adult Latinos to establish self-sustaining travel training programs.

Via's Travel Training Program also includes the Volunteer Transit Ambassador Program. As part of this program, individual volunteers at independent living communities provide peer outreach to older adults by informing them of travel training options and encouraging them to participate in ERP or Seniors on the Move. Transit ambassadors also plan outings known as "stealth travel training" to expose older adults to public transit options. Transit ambassadors receive a bus pass as a token of appreciation for their efforts. They are also provided with written materials that can be given to older adults interested in travel training (e.g., an Easy Rider Travel Instruction brochure) and copies of a "public transit questionnaire" for older adults. Ambassadors are invited to an annual luncheon at a local restaurant.

Outreach for the Seniors on the Move program occurs through letters and flyers sent to all senior centers and independent living communities. General outreach activities for Via's overall travel training program include brochures (both general Via Mobility Services and specific travel train-

ing), newsletters and presentations to agencies that have traditionally referred people, and referrals from Via's mobility specialist as appropriate. Also used but less successful have been paid advertisements, mass mailings to transit users, and representation at resource fairs.

## Results

### *Primary Benefits of Travel Training for Riders*

The Via Mobility Services Travel Training Program identifies several benefits for individuals: freedom to travel spontaneously, ability to travel independently, more transportation options, greater community involvement, increased confidence in travel abilities, and lower transportation costs. To assess the effects of the training on participants' subsequent mobility, follow-up surveys of participants are conducted each year. In 2012, one-third of participants surveyed reported having used public transit since they completed their training. Of those, 46% reported they get out more than they did prior to training, 60% reported that they are less dependent on family and friends for rides, and 26% reported less dependence on paratransit. A total of 67% of all respondents reported more choices of places they could go and 80% reported greater flexibility with their times of travel. According to one of the travel trainers, travel training can change the entire demeanor of the participant by expanding their options for getting around, thereby increasing their independence, spontaneity, and quality of life. Several program staff emphasized that the most compelling evidence of success comes from individuals' personal stories about how their quality of life has been impacted by the program.

### *Primary Benefits of Travel Training for Public Transit Agencies*

Paratransit is considerably more expensive than public transit, so to the extent that people can move from the former to the latter, there can be substantial cost savings. Most program staff emphasized that the purpose of the training is to increase the number of options available to people rather than to "get them off" paratransit. At the same time, the training can benefit transit agencies by increasing the use of public transit and contributing to a mobility options philosophy (providing people with more options). Some participants reported informally that they used both paratransit and public transit after completing the training, depending on the purpose of trips and conditions under which they were undertaken.

## Reasons for Success

Via Mobility attributes the success of its programs to the following principles and attributes.

### *Personal Qualities of Trainers*

A common theme among staff was that the personal qualities of trainers are often more, or at least as, important as job experience or background. Trainers must be able to connect with participants. Personal traits of trainers such as empathy, likability, respect, patience, and kindness are central to this ability. Trainer credibility was also seen to be enhanced when the trainer was an actual transit user. Critical thinking was considered to be important to trainer effectiveness and having established relationships in the transportation community was considered a bonus. It was also pointed out that trainers must be flexible, resilient, and calm, as they encounter unexpected changes in the real-world training environment.

### *Strong Leadership*

The person leading the program makes a difference. Via's Travel Training Coordinator is considered a dynamic leader with strong interpersonal skills, a passion for her work, and expertise in important areas related to the populations served including aging and disabilities. This is important because of the central role she plays in building and sustaining relationships with key organizational stakeholders in the community, as well as working directly with program participants.

### *Considering the Larger Context*

For example, for many people, getting to the grocery store is not the only issue; carrying the groceries home is a major challenge and often means taking multiple trips. To address this, grant funding was obtained to provide grocery carts to participants that could be taken on the bus.

### *Recognizing and Appreciating Volunteers*

Volunteers, such as those who serve in the Transit Ambassador program, are highly valued and recognized for their efforts. Volunteers can play a critical role in reaching out to the wider community, especially when resources are scarce.

### *Building and Maintaining Collaborative Relationships*

Collaborative relationships are critical to the success of the program because of the opportunity they afford to leverage resources as well as to continue to bring people in need into the program. These relationships are the necessary starting point for trust, something that is central to program success.

### *Responsiveness to Changing Community Needs and Funding Sources*

Programs need to be flexible so that they take advantage of opportunities that arise in the community, as well as be responsive to the changing needs of the populations they serve.

### *Competencies in a Full Range of Travel Training Services*

The program must include competencies in a full range of travel training services, including outreach, training of trainers, training of individuals, and other programs to meet constituents' needs.

### **Potential Challenges**

Like any lead organization in a major coordination effort, the Via Mobility Travel Training Program has faced some challenges. The following issues were identified by program staff.

#### *Outreach Is Critical*

Program staff emphasized that "you cannot talk about travel training without talking about outreach." Bringing people into the program is challenging for a number of reasons including the generally negative culture surrounding use of public transit; the stigma associated with asking for assistance; and limitations in funding and staffing that constrain the amount of outreach that needs to be done to sustain the program or allow it to grow.

#### *Successful Collaboration Requires Trust*

Developing trust with other agencies requires building and nurturing relationships with people. This takes time and effort.

#### *Reaching the People Who Need Transportation Is Often Challenging*

Individuals who need transportation are not necessarily found at the senior centers. Targeting program efforts to groups or organizations is economically feasible yet may miss many individuals who could benefit from the services.

#### *Certain Segments of the Target Audience Pose Special Challenges for Training*

Some segments of the population, such as persons with cognitive impairment or severe physical disabilities, can still use public transit, particularly if given appropriate training.

However, the training will necessarily need to be tailored to their particular situations.

### *Adequate Infrastructure Is Needed*

Issues with the infrastructure of the public transit system in the community (e.g., having buses available, having bus stops that are accessible) may limit who can benefit from the travel training. For example, many of the functional ability losses that can lead older adults to give up driving can also preclude them from using public transit even if it is available.

### *Continuity of Funding Is Not Ensured*

It is difficult to plan for the future or expand program efforts in the absence of stable and adequate sources of funding.

## **Program Replicability**

Given the right mix of funding, personnel, and community needs, all aspects of Via's Travel Training Program could be replicated. Resources needed for replication include strong leadership, trainers with the qualities described earlier, and an organizational infrastructure. Recommendations from the program coordinator for other communities interested in starting a travel training program included:

- Meeting with representatives of senior centers and other stakeholder organizations to assess interest and support.
- Determining where the program will reside.
- Getting funding in place.
- Taking advantage of resources/training on how to set up a program (e.g., Via provides a 2-day training).
- Creating marketing information to bring people into the program.

A recurring theme among program staff was the challenge of effective outreach to attain sufficient participation: “you have to have a clientele to work with.” Via suggested that the program needs to be created within a larger organization

which is either providing more general services to older adults or providing more general mobility services to the general population (like Via Mobility). Each community will have to find its best fit. An opportunity was also identified for communities starting a travel training program to forge an alliance with city transportation departments who are generally looking to increase bus ridership, as well as with nontraditional partners such as schools or jails. The issue of funding is an important one—it was recommended that communities identify a funder who will make a multi-year commitment to ensure stability of funding. Finally, the importance of having the right person to run the program was stressed—recommended characteristics included being passionate for the work, having an outgoing personality, and having expert knowledge about the populations served (e.g., disabilities).

## **Key Features**

Several features of the Via Mobility Services Travel Training Program stand out. First, the program is comprehensive in nature, offering a broad array of travel training services. At the same time, the program is flexible enough to be able to accommodate and respond to changes in the needs of the populations it serves. Program staff are highly competent and dedicated to serving individual program participants and carrying out the mission of Via Mobility Services. In addition, they recognize the importance of building and sustaining relationships with stakeholder organizations and agencies in the community, as a critical part of identifying and meeting the needs of their target service populations.

## **Sources**

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- Via Mobility Services. (2012). *Via Mobility for Life Travel Training Newsletter*, 78(2). Boulder, CO: Via Mobility Services.
- Via Mobility Services. (2013). *Via Travel Training Website*. URL: <http://viacolorado.org/services/travel-training/>. Accessed May 14, 2013.

# RTA TRAVEL TRAINING PROGRAM

## REGIONAL TRANSPORTATION AUTHORITY

### OF NORTHEASTERN ILLINOIS

#### CHICAGO, ILLINOIS



<b>Program Name</b>	<b>RTA Travel Training Program</b>
<b>Date Established</b>	1990 through community contracts, RTA brought in-house in 2005
<b>Sponsoring Organization</b>	Regional Transportation Authority of Northeastern Illinois
<b>Organization Type</b>	Public Transportation System, special purpose unit of local government and a municipal corporation of the State of Illinois.
<b>City, State</b>	Chicago, Illinois, and six surrounding counties
<b>Persons Trained</b>	1993–2005: ADA Paratransit eligible clients. In 2013: expanded to include ADA paratransit eligible individuals as well as seniors and people with disabilities not qualifying for ADA paratransit eligibility
<b>Service Area</b>	Cook, DuPage, Kane, Lake, McHenry, and Will Counties
<b>Service Area Population</b>	8,000,000
<b>Service Area Size (sq mi)</b>	2,443
<b>Data for Year Ending</b>	2012
<b>Persons Trained per Year</b>	2,074; no separate record kept of seniors trained
<b>Annual Training Expenses</b>	\$855,334—all were ADA paratransit eligible until 2013
<b>Major Funding Sources</b>	RTA Operational Funds
<b>Partnering Agencies</b>	CTA, Pace, and Metra, and approximately 500 senior centers and social services agencies
<b>Key or Unique Factors</b>	Emphasis on Safety

## Organizational Background

The Regional Transportation Authority (RTA) is an umbrella organization established by the state of Illinois for planning and budget oversight of the Chicago Transit Authority (CTA), Metra, and Pace transit agencies. There is a Board of Directors who approves an annual budget and a two-year financial plan. The Board consists of 15 members and a chairman appointed from the six-county region. The RTA Board is also required to annually review and approve a five-year capital plan, which is a blueprint of the capital activities to be funded by the RTA and executed by the CTA, Metra, and Pace. The service area is both urban and rural, because it incorporates the city of Chicago and surrounding suburban communities, but also stretches beyond the urban growth area to serve the rural portions of the six counties.

The RTA Travel Training program provides outreach to more than 500 different private nonprofit organizations. The primary partnerships are with the CTA, Metra, Pace, and the Chicago Lighthouse for the Blind.

## Program Start-Up

The RTA created its travel training program in 1990 by establishing contracts with the Chicago Lighthouse for the Blind, three Centers for Independent Living, and a Community Action Agency. Program start-up occurred in this fashion because the RTA valued the community connection to these services.

In 2004, the decision was made to bring the travel training program in-house. In 2005, the transition was completed. The Chicago Lighthouse for the Blind remained a contractor and still does travel training for RTA's blind and visually impaired clients today.

In 2013, the RTA decided to expand the travel training program to include non-ADA complementary paratransit applicants. Previously, travel training had been a part of the ADA paratransit application process and many people felt that they were required to participate in travel training even if they weren't interested. This led to unproductive staff time and effort. Currently the program is performing outreach to seniors and people with disabilities with ADA paratransit

certifications and those seniors who are not ADA eligible but could benefit from travel training.

## Program Operations

The target audience for RTA's travel training program has been ADA applicants for complementary paratransit services. The RTA has shifted from a program that identified people eligible for travel training through the ADA paratransit application process to identifying people through outreach. This new emphasis started in January 2013 and will probably increase the number of seniors being travel trained. In addition, the entire program is paperless, which is beneficial but can also be challenging.

## Resources

The RTA travel training program staff includes the Manager, the Travel Training Coordinator, and five Travel Trainers. In addition, the RTA contracts with the Chicago Lighthouse for the Blind which employs paid Orientation and Mobility Instructors to provide travel training to RTA's blind and visually impaired clients. The RTA does not use any volunteers. The RTA travel training program has an annual budget of \$855,334 shown below in Table 4-1.

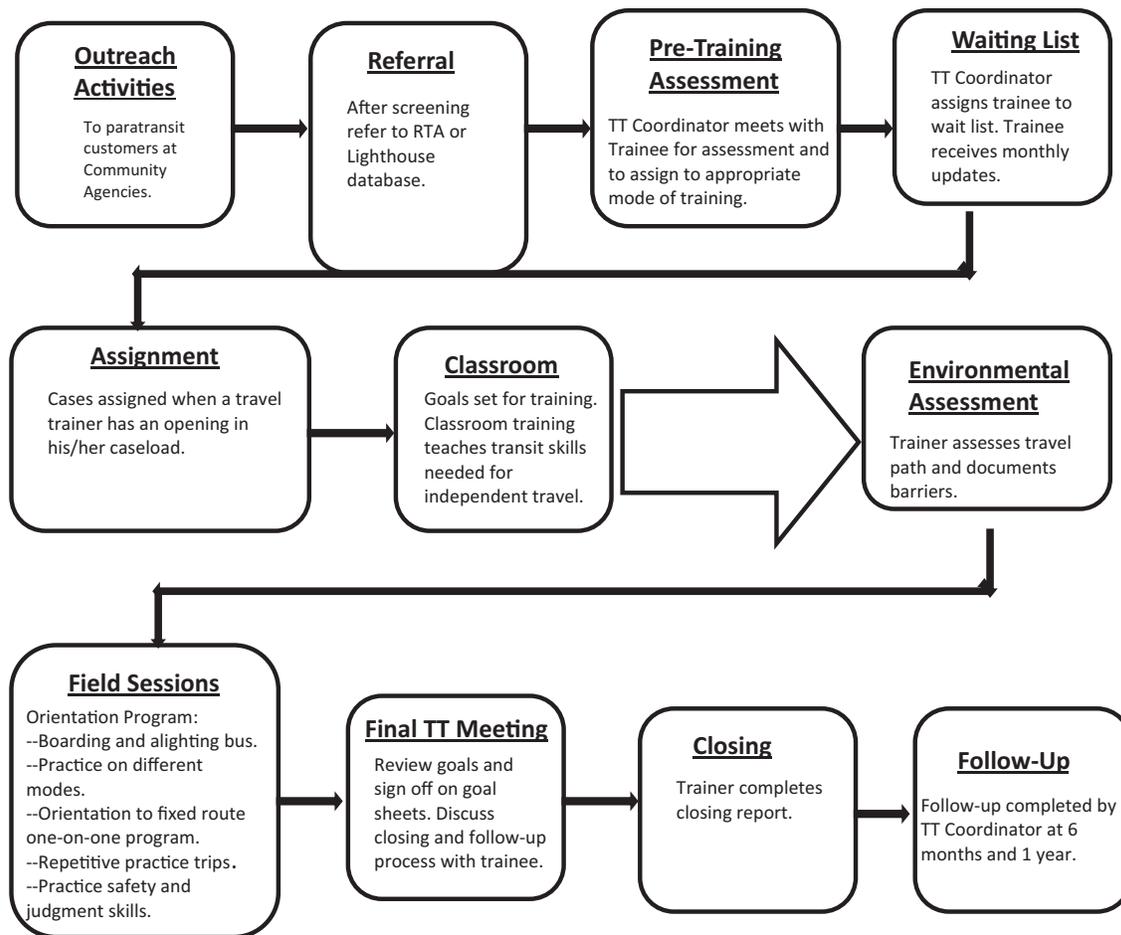
## Program Components

RTA's travel training program includes two distinct one-on-one training programs and a group training program.

- **One-on-one travel training:** In 2012, 150 customers received one-on-one travel training through two separate and distinct programs called the "Trip Training" program and "Individual Transit Orientation" training program. In the "Trip Training" program, Travel Trainers help teach program participants specific trips to locations they would like to travel to on a regular basis. In the "Individual Transit Orientation" program, Travel Trainers provide an individualized orientation to the transit system through a series of practice trips to increase comfort in using the fixed route system. The least amount of time to train an individual was 12 hours, while the longest was 174.5 hours. The average time an individual spends in training is about 44 hours. In the "Trip Training" Program, the travel trainers train an individual on up to three specific trips and work with the individual until they can do the trips with no assistance. The trainer lets the client do a trip alone while trailing the client, incognito. Once they are sure the individual can do the trip alone, they move on to train a second trip. While initially participants can learn up to three trips, more can be added later if the participant uses the trips he or she learned. In the "Individual Transit Orientation" program, the Travel Trainers will work with participants who simply need an orientation to the transit system in order to use it independently. A Travel Trainer will practice using the system with participants until they become comfortable and understand how to plan accessible trips. Trainers can also bring people who use mobility devices to a bus garage or train yard to practice boarding and alighting transit vehicles before practicing trips in live service. The flow chart for the one-on-one Travel Training programs is shown in Figure 4-1.
- **Group Training** is RTA's primary method to approach non-ADA paratransit clients. Group training sessions are held at

**Table 4-1. RTA travel training 2013 budget.**

<i>Expense Item</i>	<i>2013 Budget</i>
Salaries—Travel Training	\$349,112
Salary Increase	\$10,535
Fringe Benefit Allocation—Travel Training	\$240,725
Travel Expense—ADA Travel Training	\$36,700
Business Expense—ADA Travel Training	\$800
Translation/Interpreter Services—ADA Travel Training	\$2,500
Purchased Services—ADA Travel Training	\$32,300
Parking Coupons for Travel Trainers	\$6,000
IT Allocation	\$52,384
Office Services Allocation—Travel Training	\$114,278
<b>Total Planning Dept. Travel Training Expenses</b>	<b>\$845,334</b>
Printing - ADA Travel Training	\$10,000
<b>Total Other Dept. Travel Training Program Support</b>	<b>\$10,000</b>
<b>Total Travel Training Program Expense</b>	<b>\$855,334</b>



**Figure 4-1. RTA travel training process diagram.**

community agencies that serve people with disabilities and seniors. The group trainings consist of:

- A general introduction about the three RTA service providers: Metra, CTA, and Pace.
- A PowerPoint presentation that discusses the services and also shows how to ride.
- A description of fares and how to pay—in different ways.
- A discussion on accessibility features on buses and trains.
- Information on how to plan trips on buses and trains.
- A discussion about transit safety: how to use the service in a safe manner and what to do if problems arise.
- How to sign up for one-on-one training to learn more.
- The RTA has one trainer who performs these presentations. The program functions best in small group presentations of 20 to 25 people, but groups of more than 80 people have been accommodated. The presentations explain the RTA travel options and address safety and operational issues. Other common topics include how to pay the fare, how to ride, how to inform the driver of desired stops, and other issues.

There are different training methods used for the one-on-one training and the group training. The two one-on-one training programs are designed to offer training to people of various abilities, and include very intensive one-on-one activity. Their one-on-one process includes a very specific individual plan, which lends itself to a good evaluation process.

The group training consists of orientation to RTA, Pace, and Metra. The Travel Trainer discusses how to ride: topics include fare collection, boarding and alighting, safety, and rights and responsibilities. In addition, during the presentation the trainer answers questions and offers individual attention after the presentation. There are many handouts and a PowerPoint presentation.

There is a waiting list of 3 to 4 months for the one-on-one “Trip Training” program and 1 month for the “Individual Transit Orientation” program. The Group Transit Orientation program operates without a waiting list.

#### **Program Partners, Promotion, and Outreach**

The primary partners with RTA’s travel training program are the CTA, Pace, and Metra. They also have a contract with

the Chicago Lighthouse for the Blind that provides the travel training for RTA's blind or visually impaired travel training participants. The RTA also has contacts at more than 500 social services and human services organizations in order to perform program outreach.

## Results

The primary benefits for the participants include increased flexibility, the ability to come and go whenever they want to travel, and cost savings, because a one-way ADA paratransit trip costs \$3.00, while a one-way fixed route trip is a reduced fare of \$1.00 or sometimes free. In addition, RTA has found that generally the more the riders use fixed route transit, the more they are comfortable with it.

The program conducts 6-month and 1-year follow-up surveys in order to track the participants' continued use of fixed route transit post-training. In addition, the RTA staff has designed a travel log that they ask the training participants to complete pre- and post-training to attempt to quantify mode shifts from ADA paratransit to fixed route services as a result of training.

The trainers are very involved with each trainee and keep close contact with either the family or the case worker. There are constant, ongoing assessments throughout the training process. Each trainee has specific goals tailored to his/her training needs and the trainers continuously monitor progress toward the participants' goals. The Travel Trainers reported that many of the trainees start out thinking they can't use fixed route public transportation and end up with a better self-image and feeling confident using fixed route by the end of training. This is a benefit that is very difficult to quantify.

RTA senior management routinely requests data to quantify the benefits of the program, and the Travel Training staff has struggled to determine sound quantifiers other than participant's self-reported transit mode use. On the RTA fixed route system, because fixed route ridership tracking is not possible, it is difficult to track ridership on various modes of transit pre- and post-training. In response, the RTA has assigned one staff member in the Planning Department to explore new ways to quantify success of the program.

## Reasons for Success

While it is hard to isolate particular reasons for success, the following factors seem to be important:

- All but one of the travel trainers come from a social services background. The other trainer comes from a rehabilitation background.
- The RTA Board is supportive.
- The one-on-one training is very intensive.
- The work is done in-house with RTA employees, which makes management of the program easier.

## Potential Challenges

The early results of the non-ADA outreach have been disappointing, but the outreach program started in January 2013, so it is currently too early to form conclusions about this outreach effort.

## Program Replicability

The RTA has many forms that could be used, after modifications, for local conditions. See Sources below.

RTA offered three recommendations for new programs:

- The use of trainers with a social services background is helpful.
- Emphasize the safety aspects of using fixed route transit services.
- Study other programs and collect peer-to-peer information before you begin a new travel training program.

## Sources

- A. RTA Travel Trainer Job Descriptions
- B. RTA Travel Training Program Procedural Manual
- C. RTA Travel Training Program Pre-referral Screening Form
- D. RTA Travel Training Program Goal Sheet
- E. RTA Travel Training Assessment Report
- F. RTA Travel Training Six-month Follow-up Survey
- G. RTA Travel Training One-year Follow-up Survey
- H. RTA Travel Training Program Trip Log

## NJTIP @ RUTGERS

### RUTGERS, THE STATE UNIVERSITY OF NEW JERSEY

### NEW BRUNSWICK, NEW JERSEY



<b>Program Name</b>	<b>NJTIP @ Rutgers</b>
<b>Date Established</b>	2007
<b>Sponsoring Organization</b>	Alan M. Voorhees Transportation Center, Edward J. Bloustein School of Planning and Public Policy, Rutgers, The State University of New Jersey
<b>Organization Type</b>	State University Program
<b>City, State</b>	New Brunswick, NJ
<b>Persons Trained</b>	Seniors, people with disabilities
<b>Service Area</b>	Bergen, Essex, Hudson, Morris, Passaic, Somerset, and Union Counties
<b>Service Area Population</b>	4,176,796
<b>Service Area Size (Sq Mi)</b>	1,469
<b>Data for Year Ending</b>	2012
<b>Seniors Trained per Year</b>	Approximately 23 customers receive one-on-one travel training per year, about 10% of which are seniors, or about 3 per year; does not include group trainings or orientations. Current data for seniors not available. Most estimates provided by NJTIP include seniors and individuals with disabilities.
<b>Annual Training Expenses</b>	Total funding for NJTIP @ Rutgers is \$550,000. They estimate that 15% is dedicated to seniors, or about \$82,500. One NJTIP trainer is dedicated to working with seniors.
<b>Major Funding Sources</b>	NJ TRANSIT (for seven counties), New Freedom (for three counties)
<b>Partnering Agencies</b>	NJ TRANSIT and local sponsors
<b>Key or Unique Factors</b>	Developed based on the model of another training program (The Kennedy Center, Inc.) and adapted for conditions in New Jersey. Seniors constitute less than 10% of one-on-one trainees, although group senior training and train the trainer programs provide additional and potentially more productive outreach to the senior population. Program ownership transferred to a university-based research center in 2013 to ensure sustainability.

### Organizational Background

NJTIP, Inc. was formed in 2007 as a private nonprofit organization specifically to offer travel instruction in New Jersey. The mission of NJTIP, Inc. is “to teach persons with disabilities, senior citizens and other transportation disadvantaged populations to use public transportation as a means to increase independence and self-sufficiency.” In 2013 NJTIP Inc. became part of the Alan M. Voorhees Transportation

Center in the Bloustein School of Planning and Public Policy at Rutgers, The State University of New Jersey, and became NJTIP @ Rutgers (NJTIP).

### Program Start-Up

Small and Associates, Inc. managed a pilot travel training program funded by New Jersey Transit (NJ TRANSIT) from April 1, 2005, through June 30, 2007. Detailed information

about the pilot was provided in a final report by Small and Associates, which operated the pilot and eventually established NJTIP as a nonprofit organization. All of the information provided herein about the pilot is from the pilot study final report (Small and Associates, 2007), unless otherwise noted.

The pilot took place in NJ TRANSIT's Region 5, Essex, Morris, Somerset, and Union Counties, and was run by Small and Associates, Inc. with assistance from The Kennedy Center, Inc. NJ TRANSIT provided training and guidance about how transit operates, which Small and Associates reported was the key to the development and successful implementation of NJTIP. The Kennedy Center role involved managing initial development, training travel instructors, and evaluating first year outcomes. According to the Small and Associates report on the pilot, "the pilot helped NJ TRANSIT understand their customers' level of demand for travel instruction services and to evaluate the effectiveness of travel instruction in teaching customers the skills needed to ride the fixed route system safely and independently. It also tested whether customers could be redirected from the ADA paratransit system into the less costly fixed route system."

Of the 694 customers that received an in-person or telephone introduction to NJTIP during the pilot, 128 (18%) were interested enough to schedule an intake interview in their homes. Fifty-eight customers started travel instruction and 49 (84%) graduated. All of the graduates continued to ride the fixed route vehicles during the 9-month follow-up period. Small and Associates conducted a telephone survey of graduates and found that NJTIP was helpful in redirecting customers away from paratransit and onto the fixed route system. The survey of 40 graduates found that they were making an average of 218 round trips per week on the fixed route system (primarily buses) compared to 47 round trips per week on Access Link, the NJ TRANSIT ADA paratransit system.

According to Barbara Small, NJTIP's founding director, all of the participants in the travel training pilot were ADA applicants. Seniors constituted 18% of the individuals with disabilities who participated in the pilot program, six of whom were aged 60 to 69, and three of whom were age 70 plus. Ms. Small indicated that many of the potential senior participants were too frail to be eligible for travel training. NJTIP reported that seniors (with a variety of disabilities) needed the least instruction of all participants in the pilot. Seniors averaged 4.9 training sessions to master the travel training skills. The pilot final report includes capsules describing the experience of each participant, including those over age 60 (Small and Associates, 2007).

The cost of the just over 2-year pilot program was \$350,843. This cost included all development and operational costs. Once the program matured, the cost per customer contact hour was approximately \$72. According to Ms. Small, resources included a program manager, two to three travel instructors, and a mar-

keting coordinator. The resources needed to serve senior participants cannot be isolated since the pilot project was intended to serve individuals with disabilities, including, as noted, those who are older adults.

According to Ms. Small, the two significant obstacles to training senior participants were finding host sites interested in participating in group travel training for fixed routes and convincing older adults that fixed route service is a valid alternative to automobiles. New Jersey is a car-oriented state, and convincing individuals to utilize public transit that have been dependent on their cars, or on transportation by others with cars, can be a difficult task.

The evaluation recommended that the NJTIP program be incorporated as an independent nonprofit organization with a Board of Directors to guide and assist further development, and to facilitate fundraising from foundations and other sources. The program has now been expanded to seven counties from the original five counties that participated in the pilot project.

## Program Operations

### *Program Description*

The NJTIP website (NJTIP, 2013) provides fairly complete descriptions of the NJTIP program components. Much of the content that follows is from those descriptions. NJTIP programs serve seniors, people with disabilities, students in special education, and social services professionals. The NJTIP mission is accomplished by providing four types of services:

- One-on-one travel instruction.
- Small group (maximum 15 persons) travel familiarization that is largely focused on seniors.
- Connect to transit seminars for social services professionals and volunteers.
- Public and private in-school travel training classes. These classes are not described in more detail because they are not relevant to older adults.

**One-on-one travel training** instruction teaches individuals how to use the public bus and rail systems so they can travel independently and safely. As NJTIP notes (NJTIP, 2013), being able to ride public transportation increases employment and educational opportunities, promotes community involvement, and enhances self-sufficiency. NJTIP one-on-one training participants receive:

- A personal travel instructor who escorts them on the bus or train to teach participants to travel safely and independently.
- Individualized instruction in travel skills, which may include program content described below.

- Assistance in researching travel routes and schedules.
- A free one-month bus pass upon graduation.

Eligibility under the NJTIP grant from NJ TRANSIT includes having a disability other than a visual impairment; living within the Access Link paratransit service area in Bergen, Essex, Hudson, Morris, Passaic, Somerset, and Union Counties, and being an Access Link rider or applicant. (NJTIP, 2013).

The **Small Group Travel Training Program** supplements the original one-on-one travel instruction service. This training is appropriate for senior citizens and persons with disabilities who do not need intensive personalized training. For small group travel training, NJTIP works with a partner agency such as a residence for senior citizens, a senior center, or an independent living center for persons with disabilities. The partner agency recruits individuals who are interested in learning to use public transportation and NJTIP provides the training.

The **Connect to Transit Training Program** teaches professionals and volunteers from social services agencies, schools, and senior residences how to become informed advocates for public transportation, so they can better assist their clients, students, and residents with navigating the public transportation network. The seminars are specifically geared to using NJ TRANSIT bus and rail systems. The Connect to Transit Training Program may benefit seniors to the extent that human services and community services professionals who work with seniors may participate in the training, become more informed about public transportation and the availability of travel training, and become more willing to recommend travel training to seniors with whom they work.

## Resources

Total funding for NJTIP is \$550,000. NJTIP estimates that about 15% of that total funding is dedicated to seniors, or about \$82,500. One NJTIP trainer is dedicated to working with seniors. This individual provides group training, group orientations, and one-on-one training as needed. NJTIP does not use volunteers.

## Program Components and Approaches

For one-on-one instruction, the program teaches individuals how to use the public bus and/or rail systems so they can travel independently throughout the state. Travel instruction is personalized and customized to meet individual needs identified during a pre-screening process.

One-on-one travel instruction has five components:

- **Outreach:** NJTIP staff contact individuals who apply for Access Link to discuss travel instruction as an additional

option. Participating in NJTIP travel instruction does not affect Access Link eligibility; customers can use both services.

- **Intake Interview:** Travel instructors interview customers in person to learn about travel goals, prior travel experience, and travel instruction needs. The interview is usually at the customer's home so that family and counselors may participate to share information, ask questions, and voice any concerns.
- **Route Check:** Before taking the customer out for instruction, the travel instructor determines how to travel to the customer's chosen destination. The instructor evaluates whether this is an appropriate route by walking and riding the route from the customer's door to the destination and back. The instructor will look for any environmental barriers or travel conditions that could impact the customer's trip.
- **One-on-One Travel Instruction:** The customer and travel instructor ride the route until the customer masters all skills needed for safe and independent travel. The number of travel instruction sessions varies depending on individual needs: some customers need two round-trip sessions, others may need 30. In order to graduate, the participant must demonstrate mastery of 27 travel skills. Training content addresses issues related to traffic, vehicle, and personal safety; trip planning; travel etiquette; emergency procedures; and self-advocacy.
- **Follow-Up and Retraining:** After customers graduate from the program, they are followed for 9 months. NJTIP staff members call graduates at 1-, 3-, 6-, and 9-month intervals to determine how often the customer is traveling, if they are experiencing any difficulties, and whether or not there is a need for additional training.

Small Group Travel Training has two components:

- Small groups of 10–15 individuals participate in two classroom sessions which include a trip to a local destination.
- Participants take one or two additional trips with the instructor to destinations of their choosing so they can master these routes and travel them on their own.

In addition to teaching travel skills, Small Group Travel Training benefits participants by helping them develop “travel buddy” relationships so they can travel with a companion and it encourages participation in local community activities.

Examples of NJTIP Small Group Travel Training include:

- NJTIP has trained 439 senior citizens and people with disabilities in Middlesex County. Training included using the County Shuttle buses and NJ TRANSIT buses and trains.
- In cooperation with United Jewish Communities (UJC) of MetroWest NJ (Essex County), 499 senior citizens

attended NJTIP travel familiarization classes from 2009 through December 2012.

NJTIP forms partnerships with agencies that work with seniors, including senior apartment complexes and independent living complexes focused specifically on seniors. NJTIP believes that if you can get seniors to travel together they are much more likely to go out and use public transportation. Area Offices on Aging are another partner with whom they've worked. UJC of MetroWest Jewish Community Housing Corporation has also worked with them at some of their locations.

Connect to Transit Seminars include:

- A half-day course that covers travel basics such as understanding schedules, calculating and paying fares, emergency preparedness, and trip planning resources.
- A full-day course includes a classroom portion that covers travel basics and a field trip on a NJ TRANSIT bus so that participants can practice the topics discussed in the classroom portion.

More than 268 social services professionals have been trained through December 2012.

### *Program Partners, Promotion, and Outreach*

In addition to partnering with NJ TRANSIT, NJTIP regularly reaches out to and partners with agencies that serve seniors, housing projects with senior residents, and Area Offices on Aging. The Connect to Transit Training Program provides information about the benefits of travel training to professionals, a portion of whom work with older adults. The NJTIP Board of Directors includes representatives from some of the partnering organizations. Everyone at NJTIP markets the program even though one staff person conducts the trainings with older adults, including group trainings. NJTIP has limited its outreach efforts to the seven counties where it has been providing services under the NJ TRANSIT grant. However, part of the motivation for partnering with the Voorhees Center at Rutgers University was to expand program outreach beyond the seven counties. The Voorhees Center website has been updated to include descriptions and contact information for the NJTIP program and its staff. NJTIP staff believe there is a growing need for travel training services throughout New Jersey, especially for senior group training, and are eagerly seeking and pursuing funding opportunities in that regard.

## **Results**

Detailed information on results was available for the one-on-one training program, but results were not available for seniors as a subgroup.

From 2005 to 2011, 223 individuals graduated from one-on-one training (NJ TRANSIT, 2012). NJTIP does follow-up with graduates, including four phone calls over the course of the first year at 3 months, 6 months, 9 months, and 12 months. Follow-up calls focus on use of transportation, problems identified, any need for retraining, and additional support needed. Use of transit is self-reported and, based on the follow-up calls, 75% of graduates continued to travel by fixed route buses and trains in the year after graduation. Graduates use regular bus and train services three times more often than they use Access Link.

NJ TRANSIT conducted a survey of NJTIP graduates in 2011. NJ TRANSIT asked highly detailed questions about travel locations and use. They analyzed transit usage of 185 NJTIP graduates, and a total of 90 valid surveys were returned from 185 graduates for a 49% response rate. NJ TRANSIT found that graduates took 62,000 trips in 2011 on NJ TRANSIT vehicles, including paratransit. Per capita transit trips prior to travel training averaged 97 trips a year. After graduation, participants took 414 trips per year, an increase of more than 400%.

Annual trips were calculated for each graduate, along with trip purpose, mode, revenue, cost, and savings per graduate. Calculations were compiled to find total realized returns extrapolated for all program graduates, as illustrated in Table 4-2.

The study concluded that NJTIP increased NJ TRANSIT's farebox revenue and resulted in savings in Access Link costs for a total of \$234,000 annually. NJTIP thus covers its expenses and has a positive return of 17%. NJTIP increased transit ridership by over 62,000 trips in 2011. Return on investment is expected to increase annually as the number of graduates increases. NJTIP improves the economy by allowing trained residents with disabilities to travel to work and other locations. Total per capita transit trips increased from 97 to 414 for NJTIP graduates, an increase of more than 400%. The study did not provide subgroup demographics, so conclusions cannot be drawn from the study whether or not the trip results for seniors with disabilities were consistent with

**Table 4-2. NJ TRANSIT survey of NJTIP one-on-one training graduates.**

<i>Annual Measure</i>	<i>Total</i>
Total Additional Trips after Graduation	62,316
Return per Dollar Spent Annually	\$1.17
Total Revenue from New Transit Trips	\$92,432
Total Savings from Diverted Access Link Trips	\$141,449
Total Annual Funding Cost	\$200,000
Total Annual Realized Return after Graduation	\$233,881

Source: NJ TRANSIT, 2012

overall study results. It is unlikely that seniors had as many trips as other individuals with disabilities since many seniors would be retired and therefore would not have work-related commuting trips included in their results.

As far as NJTIP knows the study was a one-time occurrence, and NJTIP is not aware of any plans to do a follow-up study.

In interviews, NJTIP staff indicated that they get much positive, anecdotal feedback from partners about the benefits of the program for seniors. The former Director of Elder Care for the Jewish Family Services of MetroWest is a board member of NJTIP and a staunch supporter of their programs. Both she and the travel trainer responsible for the senior population provided examples of successful trainees. The former Director of Elder Care indicated that NJTIP is reaching just “the tip of the iceberg” with their senior programs. She is a big supporter of NJTIP’s group training as a way to reach more seniors and increase their independence through use of fixed route transit.

The founding director of NJTIP indicated that the evidence from their follow-up calls regarding continued use of fixed route transit is evidence of success. The NJ TRANSIT study provided evidence of the benefits for NJTIP graduates, NJTIP itself, and NJ TRANSIT by documenting increased ridership among graduates, documenting cost savings for NJ TRANSIT while still providing paratransit transportation when needed, and demonstrating that NJTIP’s financial benefits to the system were greater than the cost of the program by 17%.

## Reasons for Success

The NJTIP program is successful, in part, because a proven existing program from The Kennedy Center, Inc. could be adapted for use by another jurisdiction. Also, NJTIP’s partnerships with NJ TRANSIT, the towns in the seven-county service area, and social services agencies that work with seniors are continuing to provide forums for NJTIP to provide travel training to seniors. While the one-on-one training is limited under the terms of the NJ TRANSIT grant to individuals with a disability, NJTIP has adapted by offering group training to broaden exposure of travel training for seniors and connect to transit orientations for social services professionals and volunteers. NJTIP’s ability to ensure their sustainability by negotiating to become part of the Voorhees Center at Rutgers University is evidence of sound fiscal and educational practices, and a ringing endorsement of the program’s potential. The Center’s Director and a Center research associate indicated in an interview that they expect additional evaluation opportunities and an expansion of the program scope because the Center emphasizes both applied and theoretical research and support for sound professional practices.

## Potential Challenges

While the change in management could have been a challenge, it appears that both NJTIP and the Voorhees Center are aware of the challenges with such a transition and have taken those challenges into account during the transition period. NJTIP and its Board exercised remarkable due diligence in the process of selecting a new partner, and even participated in a competitive process and review before selecting to contract with the Voorhees Center. Continuing to obtain funding was also seen as a challenge, but the stability of Rutgers University as an operational base is thought by both NJTIP and Voorhees Center to be a strength of the partnership.

As with other northeastern U.S. programs, NJTIP indicated that getting seniors to give up their automobiles is an ongoing challenge, as is the impact that winter has on their ability to do cold weather training. They indicated that the ready availability of transit routes and options has helped with outreach in some communities, and they look forward to expanding training beyond the seven counties where they have historically offered services. Another noted challenge was coordination across political jurisdictions and transit agencies, particularly in terms of scheduling, route connections, and fare media.

## Program Replicability

The NJTIP program itself is evidence of the ability to replicate a program and customize it for the needs of the communities that it serves. It is apparent that having an experienced program staff, such as Jonathan Rubell from The Kennedy Center, participate in the development and transition of the new program was helpful. NJTIP management indicated that while the basics of travel training are not unique, finding the right mix of funding opportunities, partnerships, and transit options needs to be location specific. NJTIP encourages other jurisdictions to conduct a pilot to refine their model and to develop interest and attract funding and institutional partners. They strongly recommend that seniors be involved in the development of programs, and indicated that some programs have a senior advisory committee. The former director regretted that they did not have seniors involved initially to advise them, meaning that the program had to learn and adapt as they went along. The travel trainer emphasized the importance of having partners who are entrenched in the senior community. He indicated that more follow-up with former participants is recommended, as is finding opportunities to provide “freebies” to trainees by approaching local businesses that would benefit from increased senior transit riders. He recommended that such businesses provide discounts or other giveaways (e.g., pens, reusable shopping bag) as an incentive for seniors to participate while providing advertising opportunities for partners.

NJTIP staff believes that at least one person is needed full-time to operate the small group component of the program, although it is helpful to have two trainers available if there is a large group. They also recommended that group training be conducted between 10:00 a.m. and 2:00 p.m. since buses are less crowded at that time and it will be less stressful for the participants. It is helpful to have a second person who can focus on marketing and one-on-one travel training. Travel trainers also need to be enthusiastic about public transportation and use it themselves for a program to be effective.

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## RIDEWISE RIDE CONNECTION PORTLAND, OREGON



<b>Program Name</b>	<b>RideWise</b>
<b>Date Established</b>	2004
<b>Sponsoring Organization</b>	Ride Connection
<b>Organization Type</b>	Private nonprofit corporation
<b>City, State</b>	Portland, OR
<b>Persons Trained</b>	Older adults and persons with disabilities
<b>Service Area</b>	Washington, Multnomah, and Clackamas Counties, OR
<b>Service Area Population</b>	1,645,251
<b>Service Area Size (sq mi)</b>	3,075
<b>Data for Year Ending</b>	June 2012
<b>Persons Trained per Year</b>	In the 2012 Fiscal Year, 1,509 individuals received travel training including 235 who received one-on-one training
<b>Annual Training Expenses</b>	\$480,110
<b>Major Funding Sources</b>	Federal Transit Administration (FTA) JARC program, TriMet, STF (state cigarette tax revenue)
<b>Partnering Agencies</b>	Public transit agency (TriMet) and multiple agencies and senior centers
<b>Key or Unique Factors</b>	Close relationship with public transit. Extensive follow-up. Person-centered social services model of mobility management.

### Organizational Background

Ride Connection is a nonprofit community service organization founded in 1986 that offers transportation assistance, now including income assistance on a temporary basis, to persons with disabilities and seniors without alternative transportation. Ride Connection serves a three-county area, including Washington, Multnomah, and Clackamas Counties. The service area is both urban and rural; it incorporates Portland and surrounding suburban communities but also stretches beyond the urban growth area to serve the rural portions of the three counties. The organization prides itself on an ongoing commitment to identifying transportation needs and filling them.

Ride Connection has extremely strong support from TriMet, the local public transit authority. In fact, the idea for Ride Connection originated within TriMet. Ride Connection has developed partnerships with more than 30 separate partner agencies in the area, including adult and senior centers, mental health clinics, health care providers, community centers, health and rehabilitation centers, independent living

resource centers, denominational community organizations, the YMCA, private taxi services, private transportation providers, and other community organizations.

### Program Start-Up

Ride Connection started the RideWise program in 2004 as a result of an internal review at TriMet known as the Productivity Improvement Plan that examines every TriMet program. Ride Connection did a national survey of travel training programs that determined that the most successful programs were closely tailored to local community characteristics. Resources to start the program were provided by TriMet using FTA Section 5310 funds which were matched by TriMet funds. Initial concerns that needed to be addressed centered on changing cultural expectations: the travel training program needed to be seen as more than an offshoot of the ADA paratransit services and concern about the expense of travel training needed to be offset by a clear demonstration of the benefits of the program.

## Program Operations

### Program Description

The RideWise program teaches older adults and people with disabilities to travel independently and safely on all forms of public transportation, as well as other forms of transportation. It employs a person-centered social services model based on increasing individual independence. They are looking for “the least restrictive, most empowering solution.” Their overarching goal is to link people to services, to open up a person’s world to the possibilities available to them. A related goal is to maintain independent living at the trainee’s current residence for as long as possible. The services are provided at no charge for those who qualify.

### Resources

The RideWise program has nine full-time positions, one of which is open at this time. The program’s annual budget is \$480,000.

RideWise Volunteers designated as Ride Ambassadors, Transit Advocates, and Co-presenters contributed 1,295.75 hours of service in FY 2012 by providing expertise in leading group trips and committee work and in support of the program’s outreach efforts. RideWise closed the FY 2012 year with 40 volunteers: 22 Ride Ambassadors, four Co-presenters, 10 Transit Advocates, and four RideWise Work Group members.

### Program Components

The RideWise program offers a wide range of services tailored to meet each individual’s specific needs and ability level.

- **One-on-one travel training** is Ride Connection’s short-term, practical, and individualized instruction to teach older adults and people with disabilities to travel safely and independently using public transportation. Each of the 235 one-on-one trainees in 2012 received an average of 12.8 hours of travel instruction.
- **Group travel training** is available for people receiving support through transition programs, older adult residential facilities, community centers, and more. These outings are designed to encourage the use of public transportation by choosing a familiar destination. The training is designed to be in a social, relaxed environment for customers to “learn the ropes.”
- **Riders Club trips** are designed to give Ride Connection’s customers more opportunities to become comfortable with the public transit system by creating fun adventures that include riding fixed route to and from the destination. Activity directors at residential facilities and senior centers coordinate these regularly scheduled trips.

- **The vehicle familiarization service** is designed for individuals new to a mobility device who need assistance and practical experience boarding TriMet buses and MAX rail cars. This training takes place when the vehicles are not in service.

### Approach to Travel Training

Older adults (60 years of age or older) or persons with a disability who live in Multnomah, Clackamas, or Washington County can request travel training. Ride Connection is positioned, like an information and referral model, as the first point of contact for the training. Training is tailored to meet personal needs and abilities. About 20% of persons in the RideWise program’s one-on-one training are seniors. Seniors often take less time to train than persons with disabilities: the largest issue for seniors seems to be reducing their anxieties about using public transportation.

RideWise training proceeds in these steps:

1. The sequence of activities begins with a referral (from a social services agency, family members, neighbors, or others) that identifies a person who may need travel assistance.
2. Beginning in December 2012, all new Ride Connection customers are then routed through a travel coach.
3. The majority of travel training referrals come directly to the travel training staff who then handle these referrals. Other referrals for travel training services are received through travel options counseling with a travel coach. A new data management system uses an updated assessment tool designed to explore available transportation options with new customers based on that customer’s specific needs, ability level, proximity to transit, and their wishes and transportation goals. When travel training is selected as the recommended level of service, the RideWise staff sets up an appointment with the person in their own home with the RideWise travel trainer to conduct an initial interview. Persons entering service through the travel coaching process always receive travel options counseling as the first service that is provided.
4. If it is determined that the individual should be recommended for travel training, the next step is to decide what that training should involve.
5. If the person is recommended for one-on-one training, they are assigned to a RideWise travel trainer who first assesses potential trips by walking and riding the route from the customer’s door to the destination and back to look for any environmental barriers or travel conditions that could impact the customer’s trip. The travel trainer next creates a written plan for proceeding, provides information, and

practices transit use with the trainee, whose understanding and use of the transit system is assessed.

6. A formal evaluation of the skills of each trainee is conducted before each case is closed.

### *Program Partners, Promotion, and Outreach*

Ride Connection's key partner in the RideWise program is TriMet, the local transit agency. Over many years, Ride Connection and TriMet have forged an extremely close and productive working relationship which has proved to be greatly beneficial to both organizations. Other key partners include human services providers, volunteers, travel trainers, and the community as a whole. They want to teach people to talk about ability and that paratransit is not always the answer.

## Results

Ride Connection's programs have evolved over time from a focus on training persons to use fixed route public transit services to a program that emphasizes a mobility management perspective involving all modes of travel. This is consistent with TriMet's adoption of a mobility management focus, but Ride Connection has more of a "one customer at a time" emphasis.

RideWise conducts post-training follow-up evaluations of each of the successful independent travelers in the one-on-one training program at 3 and 6 months after their training. For the group trainings offered in the Riders Clubs, RideWise uses follow-up mail surveys.

### *One-on-One Training*

There has been more than a ten-fold growth in the number of persons receiving one-on-one training since the program began, as shown in Figure 4-2 below. The RideWise program recorded 235 successful independent travelers during FY2012. This is a 3.5% increase from the previous year. The rate of

growth of the program has slowed in recent years but is still positive. Twenty persons did not complete the training in the 2011–2012 program year. Forty-nine of the 235 one-on-one trainees were 60 years of age or older and more than one-half of the trainees were residents of Multnomah County.

**Reported Success Rate.** Individuals who completed the entire one-on-one training process became successful independent travelers 92.6% of the time. The average number of annual trips per successful trainee was 223.3. RideWise uses a Progressive Evaluation of Travel Skills form; each trainee needs to "acquire all skills and concepts listed . . . and be able to demonstrate 100% proficiency in each skill" in order to graduate from the program.

Two participants were reported as unsuccessful; these two are included in the 20 who did not complete training. Unsuccessful training occurs when it becomes apparent that a trainee is lacking the minimum skill sets needed to be a safe, independent traveler.

**Follow-up Evaluations.** Post-training follow-up evaluations were attempted for each of the 235 successful independent travelers at the 3- and 6-month intervals. RideWise considers information gleaned from the follow-up evaluations to be the best indicator of program success. Trainees can ask for additional training if needed. All of Ride Connection's programs now conduct satisfaction surveys of participants 1 year after they start participating in a program.

### *Group Training*

**Classroom Training.** In support of the Riders' Club program element, RideWise also conducted classroom-type trainings to familiarize older adults with fixed route transportation. This occurred on 22 occasions with 466 older adults participating. These trainings are on-site with residents of older adult living communities and are a routine prelude to establishing future Riders' Club trips.



**Figure 4-2. Independent travelers each year, RideWise program.**

**Riders' Clubs.** A Riders' Club transit orientation, led by volunteer Ride Ambassadors, is an enjoyable way for older adults to gain the needed familiarity and confidence to travel independently, using a fixed route service, should they decide to do so. Riders Club programs and trips can be highly tailored to the specific attributes of the local community.

During FY 2012, 751 Riders' Club participants from 20 groups took 107 different trips. Destinations included farmers' markets, Rose Parade Float construction tours, IKEA, and concerts. Lunch is typically included as part of the excursion. The destinations were selected by participants or on-site activities directors. Comments provided by survey respondents continued to be overwhelmingly positive.

Riders' Club participants are provided evaluation cards to return at their convenience. Of those that responded, first-time participants indicated a 67% likelihood of using transit for personal trips; participants that had been on two or more outings indicated a 91% likelihood of using transit for personal trips. The likelihood is self-reported on a scale of one to five (one being unlikely, and five being very likely). Individuals who responded with a three, neither unlikely nor very likely, are included in the unlikely category to create a conservative estimate of future transit use.

## Reasons for Success

### *More Effective Practices*

Ride Connection believes that a key to the success of their RideWise travel training program is its focus, in numerous ways, on creating a core philosophy and delivering a clear and consistent message to all members of the community. One component of this messaging is their focus on "building trust in the most respectful way," both with their travel training customers and with their partners. A manifestation of this is the practice of treating all trainees as "customers," not "clients" or "students." The focus on individuals as customers is a key component of their practice of mobility management, and this includes attention to the feelings of the customers, which may include concepts of dignity and fears of losing independence. It is vital to understand each person, their skill sets and other resources, and their travel needs. There is no typical training experience; their program is highly flexible and highly tailored to specific individuals. A competent staff that excels in customer service is a key to program success.

A key benefit is increasing the mobility of potential riders. There are substantial benefits of allowing older adults to age in place, and avoiding the costs of nursing homes is certainly a primary benefit. RideWise staff describe travel training as "a game changer"—changing people from shut-ins to community members. TriMet sees travel training as life affirming. The RideWise program believes that reducing anxiety is a big

deal for seniors: they try to teach them that transit is not as hard, scary, or daunting as some persons have expected.

RideWise calculates its program benefits as a 3 to 1 ratio of benefits to costs over a 1-year period. This is a conservative estimate of benefits for many reasons, one of them being that they are not calculating the long-term benefits of travel training, only the benefits over the first year that a trainee is using transit. Also, the benefits of the Riders Club are not included in these calculations. RideWise has demonstrated to TriMet that there is a productivity improvement attributable to their program that has saved money for TriMet and has slowed the growth of TriMet's ADA services. At the same time, RideWise believes that one "cannot measure program success solely by ADA cost avoidance."

TriMet has created spreadsheets to conduct detailed calculations about the benefits of the RideWise travel training program. They consider travel training to be highly cost effective. Their spreadsheets could be used to calculate long-term benefits of the program.

RideWise and its partners also see significant benefits accruing to the volunteers who are involved in the program. Partner agencies report high levels of satisfaction among the volunteers who work with the RideWise program. The peer-to-peer model is seen as a strong success.

*The Rider's Voice* is a book featuring the stories of 25 new independent travelers and advocates who have shared in the RideWise experience. Each story is a first-person account of what it means to travel independently and to move about the community with purpose and without harm. Both Ride Connection and TriMet have successfully used this book to educate their Boards of Directors and various members of the community about the benefits of improving mobility for seniors and other individuals who might need travel training or other support to become more independent in their use of travel options.

### *Less Effective Practices*

Practices that have been found to be less effective than expected include working with the Department of Motor Vehicles to provide information to individuals who do not have their driver licenses renewed. It proved too difficult to get a list of names of such persons. Also, RideWise staff members were stationed at a TriMet facility where individuals came to be evaluated for ADA paratransit eligibility. Very few individuals presented themselves at this facility for travel training, and it was found to be more appropriate to create a distinct separation between the ADA eligibility process and the RideWise program.

## Potential Challenges

A major challenge for the RideWise program is how to identify and assist seniors who are aging in place and are not

associated with any human services agency. If they had more resources they would more actively knock on doors and use Public Service Announcements.

Another challenge is that, because of the nature of travel training, the costs are incurred first and the benefits are realized later. This requires educating stakeholders so that they understand this sequence. It is sometimes difficult for the public to grasp the benefits of travel training, but RideWise staff believe that it “opens the world” to individuals who might otherwise be isolated and lonely.

RideWise staff are concerned that public transportation often receives negative publicity from local media. For example, transit safety seems to be reported as a much greater problem than it actually is. This negative reporting restricts interest in travel training programs.

There are environmental issues that may pose challenges. Hills, broken sidewalks, and streets without connections pose problems in accessing transit stops. Some destinations are not well served by public transportation, particularly in suburban areas. There is still some resistance among potential travelers and their advocates to use fixed route transportation in cases where door-to-door transportation (like ADA paratransit) could be an option.

Funding limitations restrict the full potential of travel training. RideWise expects funding to be more restricted in the future and subject to greater competition. More advertising, more professional publishing and printing, and more staff would be useful to achieve greater market penetration. More of what they are doing now would improve the lives of older adults in their community.

### Program Replicability

RideWise believes that their program could be replicated, although they stress that the most effective programs must be closely tied to local community characteristics and this requirement will necessarily lead to programs with significant differences. Key resources required for replication would first include an accessible public transportation system. After that, the program would need support from key stakeholders

and community leaders, a training curriculum, willing participants, training consent and liability waivers from participants, and means for documenting the results of the program. Having staff who can establish rapport and trust with the program’s participants is vital; staff assignments should fit the skills and personalities of the participants. A program should focus on what it can offer to participants and not try to make decisions for its customers. A cadre of volunteers, peers of the participants, is necessary for the most effective programs.

Some of the key recommendations for agencies starting a program would be

1. Recognize the limits of what is possible. Training should be seen as providing an assist, not a salvation. A realistic view is crucial; public transportation offers certain benefits but those benefits are limited in some important aspects.
2. Do not try to set up a “one size fits all” program.
3. Make your program fit your own community. Don’t recreate the wheel; celebrate uniqueness.

### Key Features

The travel training program has literally changed the culture of Ride Connection, which no longer sees itself as a door-to-door transportation provider but rather as a mobility manager whose purpose is to open up a person’s world to a variety of travel options. Their person-centered social services model is based on increasing individual independence by offering “the least restrictive, most empowering solution” to highly individual travel needs. Ride Connection and its RideWise program derive substantial benefits from their unusually close connection with TriMet, the public transit authority. This highly thoughtful, highly documented program can serve as an inspiration for others interested in travel training.

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# FREEDOM TO GO

## RIVERSIDE TRANSIT AGENCY

### RIVERSIDE, CALIFORNIA



<b>Program Name</b>	<b>Freedom to Go</b>
<b>Date Established</b>	2011
<b>Sponsoring Organization</b>	Riverside Transit Agency
<b>Organization Type</b>	Joint Powers Agency—Consolidated Transportation Service Agency
<b>City, State</b>	Riverside, CA
<b>Persons Trained</b>	Older adults and persons with disabilities
<b>Service Area</b>	Riverside, CA (eastern communities and rural areas of the county)
<b>Service Area Population</b>	1,700,356
<b>Service Area Size (Sq Mi)</b>	2,725
<b>Data for Year Ending</b>	June 2012
<b>Persons Trained per Year</b>	204 seniors and people with disabilities received training in 2012
<b>Annual Training Expenses</b>	\$212,369
<b>Major Funding Sources</b>	FTA JARC and New Freedom; Local Measure A (fuel tax)
<b>Partnering Agencies</b>	Social services agencies, senior centers, internal paratransit staff
<b>Key or Unique Factors</b>	Strong customer service, social services model, strong training team, proactive changes in services to remove barriers to travel

## Organizational Background

The Riverside Transit Agency was established as a Joint Powers Agency in 1975 and began operating bus service in March 1977. RTA is the Consolidated Transportation Service Agency (CTSA) for western Riverside County. The service area is urban and rural. The service area is large, at 2,725 square miles, with considerable distances between cities in the counties. RTA is responsible for coordinating transit services throughout the service area, providing driver training, assistance with grant applications, and development of Short Range Transit Plans (SRTPs).

## Program Start-Up

Riverside began planning its travel training program in January 2010. At the time, the primary impetus was to reduce the growth in paratransit riders which was increasing at a rate of 20% per year and clearly not sustainable. From Fiscal Year 2006 to Fiscal Year 2009, paratransit ridership increased 66%, compared to 21% on fixed route service. After designing the program and hiring staff, RTA began its travel training program in 2011, with the first travel training completed in

November 2011. The program was established to train and encourage people with disabilities to learn to use fixed route service to reduce dependency on RTA's paratransit service.

Freedom to Go has been available for older adults from the outset of the travel training program. The impetus for making the training available to older adults was senior isolation, particularly in smaller communities and rural areas.

## Program Operations

### *Program Description*

RTA's Freedom to Go program is open to all older adults and persons with disabilities in the RTA's service area. Two programs are offered: Travel Training for Seniors and Travel Training for People with Disabilities. Travel Training for Seniors has two components: the Senior Ambassador Program which focuses on group introduction to fixed route service and Travel Training which focuses on the specific skills seniors need to ride a fixed route bus independently. Travel Training for People with Disabilities teaches persons with disabilities how to recognize and overcome barriers to using fixed route service and provides a personalized travel

training plan that identifies and overcomes barriers to using service.

The main goals of the travel training program are to increase capabilities and self-sufficiency while facilitating the most suitable and efficient transportation service for each person.

With travel training, seniors and people with disabilities who receive travel training are better able to control their schedules, their time, and their lives. Seniors learn how to achieve independence from relying on family and friends for rides. People with disabilities learn how to travel independently to a destination they regularly visit and return home.

### Resources

The Freedom to Go travel training program has three full-time travel trainers, one of whom is the travel training supervisor. Each of the travel trainers focuses on different segments of the population. One trainer focuses on students with developmental disabilities who are transitioning out of high school. A second travel trainer, who is bilingual Spanish, focuses broadly on people with disabilities who are using RTA's paratransit service. The third travel trainer focuses on older persons. All three travel trainers have experience in social services program delivery.

The Freedom to Go annual budget for Fiscal Year 2012 (July 2011–June 2012) was \$215,535. Actual expenses were \$212,369. Start-up was slow, with the first training conducted in November 2011. Travel training was fully active by January 2012.

The program is housed in RTA's Operations Department and is managed by the Director of Contract Operations. Funding for the Freedom to Go program is provided from federal Job Access and Reverse Commute (JARC) and New Freedom funds and local and state matching funds. For Fiscal Year 2013, funding levels were as follows:

• JARC	\$112,741
• New Freedom	\$121,146
• Local and state funding	\$60,572
• Total budgeted funds	\$294,459

### Program Components

Freedom to Go provides the group experience and personalized training services that each senior and each person with a disability requires to successfully use RTA fixed route service, based on their individual skills and capabilities.

- **Group travel training** for seniors, the Senior Ambassador Program, introduces seniors to fixed route service. First, seniors meet with RTA's travel trainer in a group setting, usually in a senior center or other location where seniors

gather. Next, seniors take a guided ride together, typically with people they know. Within each social setting, RTA recruits a Senior Ambassador who facilitates at least one outing a month and reports back on participation.

The travel trainer conducts an orientation session where seniors are introduced to the steps involved in taking a bus ride and returning. Toward the conclusion of the group training, the seniors agree on a destination to which they will travel, in a group, 1 week later.

Later that day, a trip is made on an out-of-service bus from the location where the orientation session is held. For this trip, the bus follows the same route that serves the location where the seniors live or meet. The necessary skills covered in the orientation session are reviewed and the trip and return trip are made. One week after the initial group introduction meeting, the group meets again and takes a regularly scheduled bus trip to the outing location of their choice. At the end of the group trip, one-on-one travel training is scheduled with seniors who want additional training.

- **One-on-one travel training for seniors** is provided to seniors who have completed the group travel training. Any senior from the group training who desires to learn more is scheduled for one-on-one travel training. This one-on-one training covers route familiarization, how to read the RTA Ride Guide, understanding the system map, individual trip planning, and mobility device training. An individual travel training plan is prepared for each senior being trained. Training lasts as long as required for a senior to be able to travel successfully on their own. Refresher training may be conducted if requested.
- **One-on-one travel training for people with disabilities** was initially designed for people with disabilities who are currently using paratransit service. Training is also offered to people who are registering for paratransit service before they use the service extensively. Training is tailored to each individual's needs. Training covers an assessment of basic skills, the path of travel and barriers, and personal safety skills. Training also includes use of the Ride Guide and maps required to plan a trip. Trainers meet with the parent, care provider, case manager, and others involved in the day-to-day support of the trainee.

### Approach to Travel Training

Freedom to Go is founded on the belief that "people don't need to be independent to travel train, they need to travel train to become independent." All travel training is provided by Riverside Transit Agency travel trainers. Separate elements of the program target people with disabilities who ride paratransit service and seniors who are nearing the end of their driving careers.

Travel trainers do not wait for referrals of people with disabilities; they proactively seek candidates. They target new paratransit riders, training them before they become dependent on paratransit service. Direct contacts are made with Department of Rehabilitation (DOR), the Regional Center, and Department of Education, schools, day centers, and RTA's ADA certification process. For seniors, Freedom to Go reaches out to seniors in their regular social settings.

RTA offers a monthly pass to all people with disabilities who have been trained. Since the passes are registered to the person, RTA can, using their pass monitoring technology, proactively track riding behavior and reach out when they notice a decline in ridership.

Two new initiatives are underway. RTA trainers have reached out to the Veterans Transportation/Community Living Initiative's One Call/One Click programs in San Bernardino and Riverside Counties. Freedom to Go will add a Veterans' Ambassador to their staff. Freedom to Go has also reached out to Special Olympics to train the athletes to travel to and from practices, as well as their jobs, using RTA's fixed route buses.

Group travel training is conducted in groups of no more than 10 persons, so trips do not get over-crowded. Members of the first two training groups of 10 persons took almost 250 trips in the first month following their training.

In the course of conducting one-on-one training to allow individuals to be able to overcome barriers, RTA takes direct action to mitigate and/or eliminate barriers that are encountered. In fact, route modifications have resulted in some cases.

Intensive travel training involves the following steps prior to route training:

1. Assessment of basic skills.
2. Assessment of path of travel and barriers.
3. Assessment of personal safety skills.
4. Use of Ride Guide and maps to plan a trip.
5. Meeting with trainee, parent, care provider, or guardian for travel consent.

Freedom to Go travel trainers describe and demonstrate correct methods for all skills, such as:

1. Verbal cues or landmarks to recognize a bus stop.
2. Physical prompts, such as a tap on the shoulder or placing a trainee's hand on a stop signal.
3. Gestures such as a nod of the head, eye contact, or pointing.
4. Role playing to help problem solve an event that might happen.

Once these skills have been learned, the training focuses on:

1. Monitoring progress on a declining basis (known as "fading") so that the trainer provides less instruction as the trainee acquires the needed independence.

2. Shadowing, where the trainer follows without being seen and the trainee completes the trip independently.
3. Independent travel, where the trainer is not along on the trip.
4. Follow-up contacts at 1 week, 1 month, 3 months and annual intervals.

### *Use of Farebox Technology to Track Ridership*

Riverside provides free fares to incentivize use of its public transportation service by those who have received travel training and uses recording farebox technology to measure and evaluate use of fixed route service after travel training has been completed. For people with disabilities using paratransit service, RTA provides a monthly pass on a continuing basis for those who complete travel training and use fixed route service for their travel. For older adults not eligible for ADA paratransit service, RTA introduces them to travel training in a group session and selects one senior from a group to be their travel training advocate to encourage other seniors in the group to travel. The senior advocate receives a monthly pass for his or her use as seniors in the group complete travel training. Each senior who completes the training receives a monthly pass good for 1 month.

RTA uses its recording farebox technology to track the fixed route travel by seniors and people with disabilities who use their monthly pass to ride. Of particular significance, RTA tracks use on a client-by-client basis. For people with disabilities who have a pass permanently, RTA tracks their use on a monthly basis. If they observe that use of fixed route service has stopped or declined, travel trainers will check back with them to understand why their use has declined. Refresher training will be offered and completed to restore use of fixed route service.

Since the inception of the program, the statistics help to tell the story:

1. To date, number of persons participating in the training:
  - a. 176 seniors.
  - b. 299 people with disabilities.
2. Monthly passes RTA has distributed to trainees: 1,603.
3. Monthly pass use is reviewed on a monthly basis for
  - a. 38 seniors.
  - b. 202 people with disabilities.

### *Program Partners, Promotion, and Outreach*

Key partners in RTA's travel training program include community agencies, hospitals, senior services, school districts, the DOR, the Department of Education, Inland Regional Center, and RTA's Dial-a-Ride program. RTA promotes its travel training program on its website and through educational materials and activities such as bilingual brochures,

mailings, and presentations to its key partners. In addition, Freedom to Go works with the Braille Institute, the California Council for the Blind, and the California School for the Deaf. Word of mouth referrals are important.

## Results

Since travel training started in November 2011, nearly 500 persons have received training, more than 44,000 trips have been taken by trainees, and nearly 300 people are currently in training or awaiting intake. Detailed records are kept that measure activity and results. Data are maintained and presented separately for people with disabilities and seniors. For the period July 2012 through May 2013, for people with disabilities:

1. 30,889 trips were completed.
2. 203 people were travel trained.
3. 129 are currently in training.
4. 266 are awaiting intake or training.

For seniors during this same period:

1. 5,781 trips were completed.
2. 76 seniors were trained.
3. Group training was completed with 10 groups.
4. 1 group is scheduled.

Freedom to Go conducts two surveys to gather demographic and satisfaction data. Within the limits of the survey method (total rather than matched pair), insights were gained into pre- and post-training behavior.

For seniors, the insights included:

1. Trip purpose
  - a. Pre-training: trips focused on medical care and senior centers.
  - b. Post-training: senior trips shifted to more trips for shopping and recreation, even though medical care and senior center trips remained important.
2. Mode of transportation
  - a. Pre-training: most trips were by personal vehicle and family and friends.
  - b. Post-training: fixed route and walking were relatively higher, while personal vehicle and family and friends remained important.
3. The major pre-training challenges were reading and understanding the Ride Guide and navigating the bus system.

For people with disabilities, the insights included:

1. Trip purpose
  - a. Pre-training: trips focused on school and work.

- b. Post-training: trips shifted to more trips for medical and shopping and recreation.
2. Mode of transportation
  - a. Pre-training: friend or relative, Dial-a-Ride, and fixed route.
  - b. Post-training: fixed route use was significantly higher.
3. The major pre-training challenges were reading and understanding the Ride Guide and navigating the bus system.

Following training, nearly 70% of seniors and people with disabilities (categories combined) were completely satisfied with their training and another 22% were somewhat satisfied.

## Reasons for Success

Reasons for success include:

1. A key reason for program success is strong organizational support.
2. The three travel trainers meet regularly as a group and work very well as a team.
3. RTA management started the travel training program slowly and took time to recruit and hire the right people: the hiring process was not focused on academic qualifications but on personal qualities such as heart and compassion.
4. Monthly passes are used to track riding levels and follow-up with those whose riding levels show noticeable decline, often resulting in refresher training.
5. Regular meetings are held with ADA paratransit staff.
6. Formal training is conducted through Easter Seals Project ACTION and other conferences and web-based training.

The Freedom to Go travel training program is relatively new. The program is fully developed in a sound way. Management of the program is embedded in RTA operations, so the synergy between travel training staff and operations staff is effective and productive. This is evident in the way that services and bus stop environments are modified to remove barriers that are encountered during training. It may be too early for less effective practices to emerge.

## Potential Challenges

Potential challenges include:

1. Demand for travel training services exceeding current budget limits.
2. Looking for ways to leverage the resources to complete additional group and one-on-one training within existing budget limits.

## **Program Replicability**

The Freedom to Go travel training program has been developed very carefully, with broad RTA management insight and oversight. Services were not rolled out until the program was fully configured, so start-up issues were negligible. With the design of the travel training, the well-targeted pre- and post-training evaluations, the formal policies, practices and methodology, and the thorough documentation and database development, the program is highly replicable.

## **Key Features**

The training environment is positive, proactive, supportive, and success-oriented. Trainers empower people to find independence. The initial objective of the program was to

reduce paratransit service costs by transferring riders to fixed route. However, such a focus is not evident in the conduct of management and the travel trainers. The focus is clearly on customers.

The RTA travel training management database supports detailed tracking of group and one-on-one training, as well as following the continued travel of those who have completed training. Individual travel by persons who have been travel trained is tracked by an encoded fare card issued for use in the GFI electronic recording fareboxes. Customized reports are generated, tracking ridership associated with each individual pass, allowing trainers to monitor progress long-term. From these reports, data tables and graphs are generated weekly to facilitate the review of individual riding patterns. Reports show whether riding is stable, declining, or increasing. As necessary, retraining is offered and completed.

# PARATRANSIT MOBILITY TRAINING

## PARATRANSIT, INC.

### SACRAMENTO, CALIFORNIA



<b>Program Name</b>	<b>Paratransit Mobility Training</b>
<b>Date Established</b>	1981
<b>Sponsoring Organization</b>	Paratransit, Inc.
<b>Organization Type</b>	Private Nonprofit
<b>City, State</b>	Sacramento, CA
<b>Service Area</b>	Sacramento, Carmichael, Fair Oaks, Rancho Cordova, Citrus Heights, Rio Linda, Elverta, Orangevale, North Highlands, Elk Grove, West Sacramento, Davis, Woodland, Roseville, Folsom, and surrounding areas
<b>Service Area Population</b>	1,418,788
<b>Service Area Size (sq mi)</b>	964.64
<b>Data for Year Ending</b>	2012
<b>Persons Trained per Year</b>	400 in 2012; 12,030 from 1981–2012
<b>Annual Training Expenses</b>	\$534,429
<b>Major Funding Sources</b>	Revenue for the program comes from vendor agreements with the Alta California Regional Center (ACRC) and the California State Department of Rehabilitation (DOR). The ACRC and DOR pay an hourly rate for training their clients. Additional funding came from a New Freedom grant, a JARC grant, and from the South Area Transportation Management Association (TMA). In addition, Paratransit, under the name Innovative Paradigms, provides consulting services and travel training program management for other agencies to bring in additional revenue for the agency and the local program.
<b>Partnering Agencies</b>	ACRC, the California State Department of Rehabilitation (DOR) and the Sacramento Regional Transit District
<b>Key or Unique Factors</b>	Paratransit, Inc. has been offering travel training for the past 30 years, with some of the staff working at Paratransit the entire time the program has been running. The cost avoidance over the last 17 years in Sacramento has been estimated to be \$20,588,458.

## Organizational Background

Founded in 1978, Paratransit, Inc. is a private nonprofit corporation dedicated to providing transportation services to individuals with disabilities, to the elderly, and to related agencies throughout Sacramento County. Since 1981, Paratransit, Inc. has served as the Consolidated Transportation Services Agency or CTSA (a state-designated agency for administering transportation funds and coordinating transportation in a locality) for the Sacramento area and is recognized as a national leader in coordinated transportation programs.

## Program Start-Up

In December of 1981, the Sacramento Regional Transit District (RT) received \$62,700 in state SB620 discretionary funds administered by the California Department of Transportation for a Mobility Training Pilot Program. RT subcontracted the program to Sacramento Area Council of Government (SACOG). SACOG formed an advisory committee and the program successfully trained 70 people in the first year.

In September of 1982, the pilot program was successfully completed and Paratransit, Inc. took over the program.

Vendor agreements were established with the ACRC and the California State DOR. In 1983, Paratransit was awarded \$64,000 in Community Services Block Grant (CSBG) funds from the Sacramento Employment and Training Agency (SETA) for travel training.

Over the past 30 years, Paratransit, Inc. has continued to provide mobility training in the Sacramento area. From December 1981 to September 2012, Paratransit trained 12,030 people. The cost avoidance over the last 17 years in Sacramento has been estimated to be \$20,588,458.

## Program Operations

### *Program Description*

The program serves Sacramento County and surrounding communities. Anyone in the County is eligible for the program. If riders need to go outside of the service area, and the training is not provided through a vendor agreement, Paratransit, Inc. will show the participants how to connect to a different transportation system. Training funded through a vendor agreement may include training on transit services beyond what is provided by the Sacramento Regional Transit District.

Paratransit's Travel Training Program is a free service to the participants. The program focuses on travel training for people who have disabilities, as well as the elderly, and teaches safe and proficient use of regular public transit. In Sacramento, that includes RT buses, light rail, and Neighborhood Ride route deviation shuttles. The program teaches all of the skills needed to use public transit successfully including trip planning, safety, and the use of accessible equipment. Most of the travel training takes place in a one-on-one or occasionally in small group settings on public transit vehicles while the vehicles are in service.

### *Resources*

Over the past few years, the travel training program has varied in size due to budgetary issues. Currently, Paratransit, Inc. has three full-time travel trainers; at one point, the program had expanded to seven full-time travel trainers. The travel trainers that Paratransit, Inc. employs have a full schedule with outreach and travel training and constantly maintain a busy schedule.

The cost of training, including wages, benefits, and other indirect costs is approximately \$50.00 per hour. The average amount of hours to complete travel training is approximately 16.5 hours for all of types of individuals; this includes intellectual disabilities, mental illness, or other conditions. The average amount spent on an individual for travel training

is \$825.00 per trainee, starting with the initial assessment through their final personal report.

### *Program Components*

One-on-one or small group training is available through the Paratransit travel training program. Small group training can include successful trainees pairing up with others to become confident and feel safe riding the bus.

Mobility training (travel training) for RT in Sacramento includes:

- How to get to and from the bus stop or light rail train station.
- Training to specific destinations.
- A free RT identification card and bus pass for the month of training.
- How to identify landmarks.

#### The trainers

- Ride with the trainee on the bus or train.
- Work with the trainee's schedule.
- Show the trainees how to plan their bus and light rail routes.

Travel training outreach presentations are a major component of successful travel training programs. Travel training presentations are offered at senior complexes or senior centers. Written materials are provided to seniors so they can review the material at home at their own speed. Some of the outreach participants may also participate in a group trip. Each participant in the group trip receives a handbook with accurate transit-related information specific to the community being served. The group trip allows participants to see that public transit is a viable transit option that can meet many of their own transit needs. When outreach presentations on travel training are held at senior complexes or senior centers, there is a high response rate of seniors who will sign up for one-on-one training.

### *Program Partners, Promotion, and Outreach*

Creating successful marketing and outreach to inform the community about travel training is a major component for a successful travel training program. Paratransit, Inc. conducts outreach efforts to senior communities and senior programs throughout Sacramento County. Travel training outreach presentations are held at most senior centers and developments approximately once a year and the travel trainers will return for another presentation if the need arises; this typically occurs if there is a high rate of turnover of seniors in a specific

community. Paratransit, Inc. believes that in order to run a successful program it is extremely important to develop and maintain relationships within the community and to make sure that seniors are aware of the programs that Paratransit, Inc. offers.

Paratransit, Inc. also has relationships with programs such as the Foster Grandparents Program, which is a senior organization for retired and low income persons over the age of 55. Paratransit works with organizations like this to help plan events that will be accessible using public transportation and to help seniors gain access to these events. Paratransit, Inc. also performs a group training and orientation once a year with Foster Grandparent Program participants to explain what travel training provides and how it can be used to help the volunteers.

Sacramento County has seen a large amount of immigrants that have become interested in the travel training. Primarily the immigrants are from Eastern Europe, Southeast Asia, and from countries where the primary language is Spanish. They may be accustomed to European public transportation systems, or they might not have any public transit experience at all. Paratransit has received grant funds that will allow for hiring translators who will assist travel trainers in communication with trainees who have limited English proficiency.

## Reasons for Success

### Results

To date, Paratransit, Inc.'s curriculum has brought independence, through travel training, to more than 13,000 transit users in the greater Sacramento area, including persons who are:

- Developmentally (intellectually) disabled.
- Physically challenged.
- Mentally disabled.
- Seniors.

Over the past 30 years, the travel training program in Sacramento has averaged 400 individuals trained per year. An average year of travel training would include training for 31 seniors with no disabilities, 37 people with physical disabilities, 147 people with intellectual disabilities, 94 people with psychological disabilities, and 91 people who have more than one disability. Often the people with more than one disability are seniors with physical or psychological disabilities.

The program has averaged 80 successful trainees per year who are 55 years of age or older. Most of the seniors who have participated in the travel training program that Paratransit, Inc. provides are over 80 years old. The reason seniors often start using public transit and are interested in

travel training is because they are beginning to face issues of declining health, and beginning to look for other options for mobility due to the fact that driving is becoming less appropriate.

### *Primary Benefits of Travel Training for Riders*

The Paratransit, Inc. staff members believe that connecting people to services and to their community changes the participants' feelings of self-worth and gives riders a new sense of freedom. Travel training is a valuable program because over the years travel trainers continue to see how independence changes the participants' feelings of self-worth and value to the community and those people who surround them.

Paratransit maintains historical data for the percentage of travel training graduates who rely on fixed route service after successful completion of the course. Follow-up interviews conducted with program participants approximately 3 to 6 months after completion of the training have historically shown that between 80% and 92% continue to successfully use the fixed route system at that point in time.

Survey information shows that there are a variety of reasons why individuals do not use fixed route service after completing a travel training program, including:

- Change in health.
- Weather-related issues.
- No place to go/lack of destinations.
- Still using personal vehicle.
- Apprehensions about traveling alone.

Trainees can request additional travel training as their personal condition changes or as their travel route evolves.

### *Primary Benefits of Travel Training for Public Transit Agencies*

Mobility and travel training not only benefit the user, but also benefit transit providers, since it encourages the riders to use the most appropriate and cost effective transit options for all riders. A training program not only saves transit dollars, it also creates more space on paratransit vehicles for riders who have no other transit options.

Transit agencies that Paratransit has worked with have been delighted to discover that mobility training costs are minimal when compared with the costs of ADA paratransit service. The potential for savings is dramatic. Shifting just one paratransit user (who travels to work or to a program 5 days a week) to regular fixed route public transit can create a cost savings to an agency of more than \$7,000 a year. Training one person each month to be transit independent can provide a cost savings of more than \$80,000 a year.

From December 1981 through September 2012, Paratransit has trained 12,030 people. The cost avoidance over the last 17 years in Sacramento has been calculated to be \$20,588,458.

## Reasons for Success

### *Program Effectiveness*

Paratransit, Inc. has been conducting travel training for the past 30 years. The travel trainers and the travel training staff have seen participants that they have trained continue to use public transportation after they have been trained.

Having a successful program depends on the travel trainers. The travel trainers typically enjoy working with people and are confident in what they do. The travel trainers not only teach the trainee how to get on and off of public transit vehicles, they also teach safety and help build the trainees' confidence to encourage the riders to continue to ride public transportation.

### *Examples of Success*

A man who participated in travel training has arthritis and it is hard for him to get around because he had acquired a new mobility device. With the one-on-one travel training that was provided, he was slowly able to learn how to maneuver his mobility device and learn how to get on and off a bus. It gave the man a new sense of accomplishment and a higher level of confidence.

A woman who recently became a user of a motorized mobility device and did not know how to fully operate her chair was not confident enough to leave her apartment building. After the mobility training gave her additional explanations on how her mobility device works, she was able to gain the confidence needed to leave her apartment complex and learned how to use public transportation successfully.

A woman at a senior complex happened to attend a travel training outreach presentation. After attending the group training she gained a new outlook on life. She was no longer afraid to use the bus and now encourages others in her senior complex to also ride the bus. She now rides the bus every day.

## Potential Challenges

Paratransit, Inc. has successfully operated the travel training program in Sacramento for the past 30 years. The travel training program has been able to operate on the resources that have been provided. The amount of money for travel training has varied from year to year. The travel training program that Paratransit, Inc. operates is set up to be scalable based on the funding that is available from year to year. Financial restrictions based on the budget are the biggest challenge that the travel training program faces.

## Program Replicability

Paratransit, Inc. has successfully replicated the program in several cities. Paratransit, Inc. helped to establish programs in:

- TriMet in Portland, Oregon.
- Utah Transit Authority (UTA) in Salt Lake City, Utah.
- Baltimore, Maryland.
- Boulder, Colorado.
- Las Vegas, Nevada.
- Santa Cruz, California.
- Spokane, Washington.
- San Joaquin RTD in Stockton, California.
- Santa Clara Valley Transit Authority in San Jose, California.
- Honolulu, Hawaii.
- The Stanislaus County CTSA in Modesto, California.
- Vtrans in San Bernardino, California.

In 2006, Paratransit, Inc. established a new division, Innovative Paradigms, to provide consulting services that include travel training. The first client was the Spokane Transit Authority (STA), which established a contract to design, implement, and manage its travel training program. In Fiscal Year 2008, Paratransit trained 126 paratransit customers to use STA's fixed route service. The average travel training experience was 20.8 hours. According to STA, the cost of an ADA Paratransit trip was \$21.52 versus \$3.96 for a fixed route trip. Based on a conservative estimate of 10 trips per month per graduate, STA estimates a savings of \$265,507 the first year. Expenses for STA's program year were \$177,000, yielding a net savings of \$88,507. STA reported that in the first 5 months of FY 2009, over 100% Expense Coverage was achieved on its travel training program.

Paratransit, Inc. and Innovative Paradigms currently work with Spokane, Washington, and San Joaquin RTD in Stockton, California, and other cities to create and maintain successful travel training programs. Paratransit, Inc. and Innovative Paradigms are skilled at designing, implementing, and managing customized travel training programs. The consulting services offered by Paratransit, Inc. and Innovative Paradigms include operating a travel training program for other agencies or helping other agencies to successfully set up and operate their own travel training programs.

Paratransit, Inc. and Innovative Paradigms offer their qualifications for

- Developing policies, training manuals, and procedures to be used based on the nationally recognized Easter Seals Project ACTION Train the Trainer Program.
- Handling every aspect of travel training, such as working with agency partners, assessing program needs, hiring staff, training trainers and participants, or managing a program.

- Providing community outreach to targeted populations.
- Designing effective training for both individuals and groups, and measuring success.

### **Key Features**

Paratransit, Inc. has been offering travel training for the past 30 years, with some of the staff working at Paratransit the entire time the program has been running. Paratransit continues to shape travel training in Sacramento and has demonstrated

through its consulting service how to create and implement a travel training program in other cities.

### **Sources**

- McGuire, Philip. 2009. Case Study: Paratransit, Inc.'s Unique Success with Coordinated Human Service Transportation. *Innovative Paradigms*.
- Wolf-Branigin, Karen, Wolf-Branigin, M., Culver, J.D. and Welch, K. Can Travel Training Services Save Public Transportation Agencies Money? *TR News*, No. 278, January–February 2012, pp. 36–39.

# SENIOR MOBILITY ORIENTATION, TRAVEL TRAINING, AND OTHER TRAINING THE KENNEDY CENTER, INC. TRUMBULL, CONNECTICUT



<b>Program Name</b>	<b>The Kennedy Center Senior Mobility Orientation, Travel Training, and Training and Professional Development for Transit Staff</b>
<b>Date Established</b>	2006
<b>Sponsoring Organization</b>	The Kennedy Center, Inc.
<b>Organization Type</b>	Private Nonprofit Corporation
<b>City, State</b>	Trumbull, CT
<b>Persons Trained</b>	Older adults and persons with disabilities
<b>Service Area</b>	State of Connecticut
<b>Service Area Population</b>	2,492,081, of which 709,854 are over age 60
<b>Service Area Size (sq mi)</b>	5,014 (Based on CT FY2014 Municipal Dial-a-Ride Funding Formula)
<b>Data for Year Ending</b>	June 2012
<b>Persons Trained per Year</b>	128 total; 6 in one-on-one travel training; 122 in senior presentations
<b>Annual Training Expenses</b>	\$434,632 (\$55,000 for older adults)
<b>Major Funding Sources</b>	CTTRANSIT Via a Grant from Connecticut Department of Transportation
<b>Partnering Agencies</b>	Transit agencies in urban and suburban transit districts in Connecticut
<b>Key or Unique Factors</b>	In addition to training seniors and people with disabilities on a one-to-one basis, The Kennedy Center, Inc. offers training to transit agency staff and consulting/project implementation support to other organizations starting up travel training projects. TKC offers both group orientations and group trainings.

## Organizational Background

The mission of The Kennedy Center (TKC) is “to promote the empowerment of these individuals to achieve their optimal participation and inclusion in the community with both dignity and confidence.” The Kennedy Center does this by offering services, including travel training, to individuals with disabilities and the elderly. Since 1991, TKC has provided travel training to more than 3,000 people with cognitive, sensory, and physical disabilities so these individuals could use local buses and trains to access their communities.

## Program Start-Up

In 2005, The Kennedy Center saw a need to serve others besides adults with disabilities: seniors were identified as a population that might benefit from travel training. TKC appealed to its funding source, CTTRANSIT and the Connecticut Department of Transportation (DOT), for addi-

tional funding to support a full-time staff member who would be dedicated to providing outreach and training to seniors as well as transitional high school students, another niche within the travel training population that demonstrated a significant need for education and transportation training, which the existing TKC travel training program could not adequately support. The additional funding request was approved in July 2006 and TKC hired a full-time staff person, made appointments, and began rebranding their program to market to seniors. The travel training program began with one full-time staff member once funding was received. TKC indicated that it took time and energy to get to know the organizations and their staff that could promote the program to seniors, and face-to-face visits and meetings were needed to facilitate this. It also took some time to establish TKC’s credibility with the senior population and service providers. TKC eventually became known in the senior community, and were able to establish their credibility with the senior population and service providers. The TKC program is unique in the

state of Connecticut in that they get state funding to provide travel training and outreach to seniors.

## Program Operations

### *Program Description*

TKC promotes three attributes of fixed route transit:

1. Fixed route transit fits the lifestyle choices for seniors by allowing flexibility and encouraging riding with friends.
2. Fixed route can be appealing to some seniors compared to ADA paratransit and taxis because it is less expensive. The cost savings can lead to more independence for seniors.
3. Seniors have an enhanced ability to be spontaneous because unlike with ADA, you don't need a reservation.

The TKC travel training program includes Senior Mobility Orientations and one-on-one training for individuals looking to increase their mobility options. TKC does many presentations (e.g., Senior Mobility Orientations) that can segue to one-on-one training. TKC staff indicated that while the opportunity is there for individuals to participate in one-on-one training, weather, family resistance, and dependence on family or personal vehicle use are obstacles that have limited the growth of senior travel training. Group training can sometimes overcome these obstacles by offering a social activity in which seniors can participate. Orientations may include trip planning to address the needs of specific audiences and locations in order to demonstrate the practicality and utility of fixed route transportation. TKC has developed PowerPoint presentations for group presentations that can be customized for the specific needs of their audiences. More detailed trainings at senior centers and senior housing developments may involve a bus ride to a designated location to illustrate specific issues in using fixed route transportation and demonstrate its convenience and practicality. TKC offers a group orientation and group training. The group training is a 2-hour transit introduction curriculum and includes a bus ride, while the group orientation covers many topics, including the availability of alternative travel options.

The one-on-one travel training program is predominantly attended by people with disabilities who are not seniors. TKC staff estimated that, over time, 10% of their one-on-one travel training participants were seniors, but in the last complete year (July 2011 to June 2012) TKC provided one-on-one training to six seniors, or about 3% of the individuals trained.

### *Resources*

The funding for travel training for individuals with disabilities and for seniors is provided by a \$434,632 mobility train-

ing grant from Connecticut DOT via CTTRANSIT. There is no specific budget set aside for the senior travel training program. TKC estimates that the cost of providing outreach, group orientations and trainings, and occasional one-on-one training to seniors throughout the state is equal to about \$50,000. Operating costs such as travel/mileage/vehicle costs, promotional material printing/preparation, office space, telephone, computer use, supervision, and other costs amount to an additional \$5,000 per year for a total of \$55,000 for training older adults. TKC uses full-time staff to support the senior travel training program, and does not use volunteers. TKC is in the fourth year of a 5-year grant, and the budget for the mobility program is revised and approved annually.

### *Program Components*

**Senior Mobility Orientation.** According to TKC, the Senior Mobility Orientation is designed to assist seniors in utilizing public transportation for daily travel needs. An instructor works with participants to introduce them to the bus or train routes they would like to learn. It can be as simple as helping find and read schedules or planning a trip. Staff will accompany individuals on their first few transit trips. Group training is a 2-hour transit introduction curriculum and includes a bus ride, while the group orientation covers many topics, including the availability of alternative travel options.

**One-on-One Training.** The TKC travel training program got its start training people with disabilities to use fixed route transportation and to advise them on the range of transportation options available in Connecticut. TKC conducts a pre-assessment on each potential one-on-one trainee that includes multiple parts to allow customization of the training program. TKC conducts route research to help the senior get to her/his desired destinations. TKC staff then prepares a customized training plan and continues to provide training support until the individual has mastered the skills needed to independently use fixed route transportation. TKC then conducts a post-travel training test on 28 factors to ensure that the individual has mastered the necessary skills to use fixed route transit. TKC conducts follow-ups at 1 month, 3 months, 6 months, and 1 year post-completion to determine the extent to which the individual is using fixed route transit, identify any problems she/he has had, determine how many round trips they take within an average month, and identify the biggest difference for the individual as a result of the travel training.

**Mobility Management Project.** TKC received a grant from FTA's New Freedom program to conduct a Mobility Management Project. This project aims to coordinate all

transportation options for people with disabilities, seniors, and veterans in southwestern Connecticut, identify gaps in service, and help implement new service where it is most needed. The project will support seniors living in southwestern Connecticut by solving transportation-related challenges for those seniors, including providing group and one-on-one travel training when it is appropriate.

**Travel Training Consultation.** The Kennedy Center conducts “Train the Trainer” seminars and consults with agencies interested in starting a Travel Training Program. The focus is on consulting for other entities who want to start travel training programs. Services include helping transit and human services agencies develop a travel training program. TKC’s 2012 *Travel Training Guide* is in its Fifth Edition. As noted in the *Guide*, it is intended to “. . . assist a trainer to teach in all phases of the process. It is designed for any person with any disability (except those who are blind or severely visually impaired).”

### *Approach to Travel Training*

The senior travel training program built on the model and lessons learned from earlier efforts to provide travel training for people with disabilities. The one-on-one training provides customized training based on a pre-training assessment of individuals to determine their needs, capabilities, and travel training goals. The customized plan for each individual includes research on routes to destinations of interest to the trainee, and continues until the individual’s needs have been met and their level of comfort is such that they can use fixed route transit on their own. The program includes a post-travel training test on factors that are critical to travel independence, as well as follow-up contacts at regular intervals. TKC works closely with transportation providers to determine the availability of transit options. The one-on-one program is complemented by a regional mobility management project operating in southwestern Connecticut, as well as a travel training consultation process that includes Train the Trainer seminars and consulting to serve the travel training needs of jurisdictions outside of Connecticut.

### *Program Partners, Promotion, and Outreach*

TKC is frequently in touch with transit districts, social and human services agencies, and senior housing developments in Connecticut, but especially those serving large urban areas such as Hartford, Bridgeport, New Haven, and Norwalk. The majority of referrals come from front-line staff in the transit districts who work on ADA eligibility issues and with the elderly. TKC developed Public Transit 101, a program that includes outreach workshops with a PowerPoint training pre-

sentation and bus tours designed to increase human services agency and staff awareness of the importance of transportation for people with disabilities and seniors.

## **Results**

TKC does follow-ups for one-on-one training participants at 1 month, 3 months, 6 months, and 12 months post-completion. These could be used to summarize results, but follow-ups tend to focus on individual progress, not collective results. The overall satisfaction level for those consumers receiving travel training support was 4.37 out of a possible 5.00. These results include travel training for people with disabilities and senior travel training participants. TKC reports that the response rate is relatively low (10% to 15%), so it is possible that the satisfaction survey is returned more often by those with a positive experience, and results should not be generalized.

## **Reasons for Success and Potential Challenges**

### *More Effective Practices*

One of the reasons that TKC has been successful is that they have worked effectively with the many transit districts within the state, particularly those in the southwest part of Connecticut and the larger urban transit districts. TKC’s success is also demonstrated by the desire of other northeastern organizations to receive “Train the Trainer” and senior travel training consulting services.

### *Less Effective Practices*

An ongoing challenge for the program has been some resistance among some seniors and often among their family members regarding the physical challenges and potential risks of riding public bus lines. Winter weather in Connecticut can be an obstacle for seniors, and TKC rarely offers one-on-one travel training during cold weather months. Program staff also indicated that family members can sometimes be resistant to fixed route transportation.

## **Potential Challenges**

An ongoing challenge for the program has been some resistance among some seniors and often among their family members regarding the physical challenges and potential risks of riding public bus lines. For a large segment of the population in Connecticut, public transit was not seen as an option and the continued availability of personal vehicles and rides from family members offer legitimate transportation alternatives. Travel training has been a tougher sell for

seniors who had not previously used public transit. Most TKC senior travel trainees have been lifelong fixed route users who needed to learn new routes or learn how to use fixed route given their more limited mobility due to wheel chairs and scooters. Travel training has done particularly well with lower income seniors living in denser populated urban areas where access to public transit is more frequent. The weather in Connecticut continues to be an obstacle with seniors by and large not wanting to do travel training during the winter months, and TKC seldom if ever does one-on-one or group trainings during the cold weather months.

As noted above, demand for one-on-one training among seniors is not particularly high. This could be due to a variety of factors including the weather in Connecticut, the availability of transportation by family, senior housing developments, and the resistance of individuals who historically have not used fixed route transit. TKC believes that group training, with its emphasis on socializing and traveling with a companion, might be an effective way to address this challenge. Regarding funding for travel training, TKC indicated that they felt they had a strong program that could be competitive, but expressed concerns about the ongoing challenges related to funding their programs.

## Program Replicability

TKC provides customized consulting services to help other transit agencies get started. TKC sells three resource guides that can be used by other entities to promote senior travel training. Clients have included the Massachusetts Bay Transit Authority (MBTA), which trains users in the greater Boston area to transition from paratransit to buses, subways, and ferries. For New York City Transit (MTA), TKC was hired to travel train Access-A-Ride registered users in all five boroughs to transition from paratransit to fixed route services. TKC also assisted NJ TRANSIT (New Jersey Transit) to establish and implement a pilot travel training program for a 14-town region. Consultation to the contract nonprofit service provider, NJTIP, included staff training, curriculum development, quality review and assurance, and data management and tracking (TKC, 2013).

Public Transit 101 is a two-hour workshop developed to teach human services professionals, people with disabilities, and other constituencies about community transportation options and how to use local buses and trains. The program includes information that supports human services professionals in providing travel training support to their constituencies.

TKC sells three resource guides:

- *The Family Guide to Travel Training* (TKC, 2006a) is “a straight forward, easy to read guide containing excellent information for travel training programs to hand out to

the family considering travel training for their relative.” (TKC, 2013).

- *A Chance To Ride* (TKC, 2006b) includes success stories of 14 individuals highlighting their desire to ride public transportation.
- The *Travel Training Guide* (TKC, 2012a), as noted above, provides detailed information on how to conduct travel training, including resources such as pre-training assessments, pre- and post-training tests, and follow-up forms. This guide was developed to assist the travel trainer in all phases of travel training.

TKC recommends that communities adapt the program to the needs in their own community and its own fixed route system. This includes getting buy-in from transit districts whose ridership might benefit from increases resulting from training seniors. TKC also recommends reaching out to constituencies such as seniors and the human services agencies that support them, understanding the demographics of the community, and focusing on finding concentrations of seniors and the facilities that serve them. TKC recommends addressing the specific concerns and fears of seniors, and addressing the gaps and barriers in the fixed route system.

Regarding resources, TKC recommends hiring at least one full-time staff, but ideally two so that one can focus on training while the other focuses on outreach and is available to answer phones and other inquiries. TKC recommends hiring specialists in senior services who have experience with the population and the destinations they frequent. Most importantly, the trainers have to believe in the program, believe in public transportation, and should use public transportation themselves. TKC believes that the core of a program is one-on-one training, and believes that their method, curriculum, and skills are proven. They think that innovation is possible in classroom (group) training and marketing. They recommend joining advocacy groups focused on transportation planning, which is good for networking and finding funding sources. Specific organizations mentioned included Community Transportation Association of America (CTAA), Association of Travel Instruction (ATI), APTA, local Area Agencies on Aging, and AARP.

## Key Features

In addition to training seniors and people with disabilities on a one-to-one basis, The Kennedy Center, Inc. offers training to transit agency staff and consulting/project implementation support to other organizations starting up travel training projects. TKC offers both group orientations and group trainings. The group training is a 2-hour transit introduction curriculum and includes a bus ride, while the group

orientation covers many topics, including the availability of alternative travel options.

## Sources

- The Kennedy Center, Inc. (2013). Mobility Services: Travel Training. Downloaded from <http://www.thekennedycenterinc.org/what-we-do/programs-services/mobility-services/travel-training.html> on March 25, 2013.
- The Kennedy Center, Inc. (2012a). *Travel Training Guide*, Fifth Edition. Trumbull, CT: The Kennedy Center, Inc.
- The Kennedy Center, Inc. (2012b). Create Hope, Celebrate Potential: The Kennedy Center 2011 Annual Report. Downloaded from [https://kennedyctrorg.presencehost.net/file\\_download/5c7e3a88-e1db-488c-b973-0bec49722bf1](https://kennedyctrorg.presencehost.net/file_download/5c7e3a88-e1db-488c-b973-0bec49722bf1) on March 26, 2013.
- The Kennedy Center, Inc. (2011). Connecticut Travel Training Annual Report July 2010–January 2011. Trumbull, CT: The Kennedy Center, Inc.
- The Kennedy Center, Inc. (2006a). *Family Guide to Travel Training*, Fourth Edition. Trumbull, CT: The Kennedy Center, Inc.
- The Kennedy Center, Inc. (2006b). *A Chance to Ride: Opening Doors to Independence Through Travel Training*, Third Edition. Trumbull, CT: The Kennedy Center, Inc.
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## CHAPTER 5

## Additional Case Studies

The extensive search for exemplary travel training programs identified additional programs beyond the seven travel training programs selected for in-depth case studies. These programs also offer potential models for organizations considering developing travel training programs and for researchers interested in the development, conduct, and sustainability of travel training programs. These programs were also selected by the criteria used to rank candidates for the more detailed case studies that included site visits to collect more detailed information about program focus and operations. These criteria, described in detail in Chapter 1, included factors such as:

- Willingness to provide public information.
- Complete program details available.
- Older adults were a primary focus and target audience.
- Participant data available to assess the program.
- Before and after assessment to determine consumer needs and learning progress.
- Measures of success used to draw conclusions about the success of the program, including results for consumers.

Based on the total scores for the ranking factors, 13 travel training programs were selected as programs that would most likely yield important information on travel training programs for older adults. These 13 programs, described in detail on the following pages, received higher scores than any potential case study candidates other than those selected for the in-depth on-site data gathering.

- METRO Regional Transit Authority Akron, Ohio
- Delmarva Community Services, Inc. Cambridge, Maryland
- Stark Area Regional Transit Authority Canton, Ohio

- Central Ohio Transit Authority Columbus, Ohio
- The Rapid Grand Rapids, Michigan
- Laketrans Grand River, Ohio
- Valley Regional Transit Meridian, Idaho
- Monterey-Salinas Transit Monterey, California
- Intercity Transit Olympia, Washington
- San Mateo County Transit District San Carlos, California
- Santa Clara Valley Transportation Authority San Jose, California
- Spokane Transit Authority Spokane, Washington
- Washington Metropolitan Area Transit Authority Washington, D.C.

Examination of these programs reveals the following characteristics common to multiple programs:

- **Nearly all programs served multiple age groups, including seniors:** Most programs served multiple populations. Some programs provided travel training to anyone of any age that was interested, while others concentrated on people with disabilities and older adults.
- **Programs were customized to the needs of the individuals:** Nearly all of the programs featured customization of the program to the needs of the individual being trained. Most of the programs featured an assessment of individual needs. Some programs limited one-on-one travel training to individuals with disabilities, while others offered one-on-one training to anyone who was interested. Several programs were made available to non-English speaking populations.
- **While programs are customized, one-on-one programs generally had the same general focus:** Most one-on-one programs included an orientation to fixed route options, how to read a schedule and plan a trip, how to ride safely,

how to pay for fares, how to enter and exit the bus safely, and orientation to specific routes and destinations.

- **Programs included multiple training options:** Almost all programs supplemented one-on-one training with group training orientations (overviews designed to introduce travel training and fixed route transit) and group training (some classroom or other travel training instruction combined with group trips).
- **Group trainings conducted in the community:** Programs offering group training did so in the community. In the case of programs that targeted older adults, programs were offered at senior centers, senior housing projects, veterans groups, and other programs or facilities where seniors congregate. Group trainings usually combined classroom education with a trip or two on a bus.
- **Many programs incorporated volunteers to offer travel training or act as buddies:** Several programs incorporated volunteers as travel trainers, volunteer mentors, or buddies. Many programs used a Train the Trainer process to expand the availability of travel training within the community. Some programs used volunteers to be paired with less experienced riders in one-on-one training sessions or in groups.
- **Some programs were expanding group training to replace one-on-one training:** Several programs indicated that they were shifting their emphasis to group training from one-on-one in order to reach more potential individuals, reduce costs, or provide a more socially oriented program to attract participants. These programs seemed especially well-suited to individuals who were not eligible for ADA paratransit or did not require the extensive, customized training that is the foundation for one-on-one travel training.

Some programs featured some unique or seldom found characteristics.

- **Rural program:** The **Delmarva Community Services One-Stop Mobility Management Travel Training Program** offers services in a large and sparsely populated area. Local transportation resources are limited and stretched thin. Many individuals in this area have had no previous experiences with public transportation, so overcoming initial fears and misperceptions can become a large part of travel training. The travel training and mobility management programs are linked to each other, benefitting both programs by promoting transit options beyond Delmarva Community Transit (DCT). Travel training, operating from a one-stop community service center, is based on a very personal knowledge of the individual and her/his immediate local travel options. There is a focus on developing personal skill sets for accessing a whole menu of public and other services, including, but not limited to, transportation.
- **Using comment cards to collect feedback on travel training:** SARTA uses comment cards to collect feedback on its program to focus on program improvements.
- **Using fare media to track ridership following training:** Spokane Transit Authority uses Smart Card technology to track use of public transit by individuals who received training from their training program.
- **Senior mobility guide to provide information on transit options:** The Santa Clara Valley Transportation Authority publishes a *Senior Mobility Guide* to provide information on public transportation options for older adults.

Case studies of these programs are presented on the following pages.

# TRAVEL TRAINING METRO REGIONAL TRANSIT AUTHORITY AKRON, OHIO



<b>Program Name</b>	<b>Travel Training</b>
<b>Sponsoring Organization</b>	METRO Regional Transit Authority
<b>Address</b>	416 Kenmore Blvd
<b>City, State</b>	Akron, OH
<b>Organization Type</b>	Regional Transit Authority, created under authority of the Ohio Revised code, as a political sub-division of the state of Ohio, with its own voter-approved taxing authority
<b>Training Program Began</b>	2011
<b>Service Area</b>	Summit County, OH, including all cities, villages, and townships
<b>Service Area Population</b>	542,899
<b>Service Area Size (sq mi)</b>	420
<b>Data for Year Ending</b>	2012
<b>Annual Training Expenses</b>	\$114,000
<b>Major Funding Sources</b>	Agency operating budget
<b>Partnering Agencies</b>	Northeast Ohio Travel Training Collaborative (NEOTT)

## Program Description

The travel training program is designed to teach people the skills they need to ride a bus. First, a mobility specialist determines the options available for a person's travel needs. Based on that assessment, the training program is customized to teach a person the skills needed to ride. Through training, people learn how to read bus schedules, how to use bike racks, how to plan a trip, and how to transfer between buses. Training may last from a couple of hours to a few days—however long it takes for a person to be comfortable using METRO's line service.

Any resident of Summit County interested in learning more about how to ride METRO fixed route service buses can participate in travel training. A person using paratransit service who is unfamiliar with fixed route service or a new resident who has never used a public transit system before can take METRO's travel training course.

Training is also offered for inter-regional travel—from Akron to Cuyahoga, Stark, and Portage Counties. The Stark Area Regional Transit Authority (SARTA) and Portage Area Regional Transit Authority (PARTA) provide service to and from METRO's transit center. METRO, PARTA, and SARTA all operate routes to Cleveland.

Target audiences include:

- Current riders of ADA complementary paratransit service; new fixed route riders; anyone interested in learning more about METRO fixed route service.

- Residents of senior apartment buildings located on fixed routes; seniors using complementary paratransit service; senior centers.
- Enrollees in eight public schools and the International Institute of Akron, especially students with learning disabilities and persons not likely to drive.

Travel training is offered in one-on-one sessions, classroom sessions, and as group training.

All travel training is customized to the person being trained. An assessment is completed prior to initiation of training. Training conforms to the needs of the person rather than the person conforming to a strict training regimen.

Travel training is offered on the trainee's schedule, so appointments are made at the trainee's convenience. In addition to scheduled one-on-one training, bus schedule reading classes and website demonstrations are available to help people become familiar with planning a trip before riding the bus.

METRO conducts quarterly travel training orientation sessions at its transit center. Group training will be conducted off-site upon request; METRO is also proactive in seeking off-site opportunities.

#### **Key or Unique Factors**

1. The travel training program has two travel trainers who are managed by a travel trainer with 7 years of travel training experience.
  2. Registration for travel training may be initiated on METRO's website.
  3. The METRO Travel Training program is a founding member of the Northeast Ohio Travel Trainer Collaborative (NEOTT). This group works to improve the quality of travel training in the community and on public transit by sharing information, ideas, experiences, and continued education through interagency collaboration.
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# DCS ONE-STOP MOBILITY MANAGEMENT TRAVEL TRAINING PROGRAM

## DELMARVA COMMUNITY SERVICES, INC.

### CAMBRIDGE, MARYLAND



<b>Program Name</b>	<b>DCS One-Stop Mobility Management Travel Training Program</b>
<b>Sponsoring Organization</b>	Delmarva Community Services, Inc. (DCS)
<b>Address</b>	2450 Cambridge Beltway
<b>City, State</b>	Cambridge, MD
<b>Organization Type</b>	Human services nonprofit 501(c)(3) organization
<b>Training Program Began</b>	2007
<b>Service Area</b>	Caroline, Dorchester, Kent, and Talbot Counties, Maryland
<b>Service Area Population</b>	123,663
<b>Service Area Size (sq mi)</b>	1,406
<b>Data for Year Ending</b>	2012
<b>Annual Training Expenses</b>	\$624,000 for the four counties, including travel training and mobility management activities plus one-stop center operations
<b>Major Funding Sources</b>	FTA, JARC, and New Freedom Programs
<b>Partnering Agencies</b>	Maryland Commitment to Veterans; Lower Shore United Way
<b>Program Description</b>	<p>Delmarva Community Transit (DCT), a program of Delmarva Community Services, Inc., provides a variety of transportation services for the primarily rural four-county community, including general public fixed route shuttle services in the Cambridge urban area, flexible routes linking Dorchester County to other areas of the Eastern Shore, and specialized service door-to-door van transportation for senior citizens ages 60 and older and persons with disabilities. Demand-responsive passengers must provide 24-hour notice of their desired trips.</p> <p>DCT reports that “travel training can be the bridge that connects older adults with the freedom to travel on their own terms again” after age-related changes. This highly person-centered program provides travel trainers who ride with and teach seniors, people with disabilities, and non-English speakers how to use the bus and how to change buses if needed. Services are provided to anyone going to work and anyone in need of training. Group trainings focus on field trips to enjoyable destinations; this strategy appears to be particularly important for cultivating the cultural norms of some minority groups. A mobility manager is available to help people work through obstacles preventing them from using the bus, as well as to teach people about the many different types of transportation services that are available. The mobility manager also can help people plan their trips and locate available transportation other than DCT. Travel training is free; when trainees can organize and take their own trips, they become paying riders.</p>

**Key or Unique Factors**

DCT's service area is largely rural. Local transportation resources are limited and stretched thin. Many individuals in this area have had no previous experiences with public transportation, so overcoming initial fears and misperceptions can become a large part of travel training. Learning how to communicate with potential consumers is a big part of the travel training program. DCS's travel training program seeks to educate and transform the transit system's personnel to make them more person-centered, as well as working with the travelers. In this large and sparsely populated area, it is important to try to measure the quality of the ride as well as more common statistics involving costs and numbers of trips. The travel training and mobility management programs are linked to each other, benefitting both programs by promoting transit options beyond DCT.

Travel training, operating from a one-stop community service center, is based on a very personal knowledge of the individual and his/her immediate local travel options. The service center includes a team of experts in many fields who can be advocates for the riders in ways that extend beyond transportation services. There is a focus on developing personal skill sets for accessing a whole menu of public and other services including, but not limited to, transportation.

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# SARTA TRAVEL TRAINING

## STARK AREA REGIONAL TRANSIT AUTHORITY

### CANTON, OHIO



<b>Program Name</b>	<b>SARTA Travel Training</b>
<b>Sponsoring Organization</b>	Stark Area Regional Transit Authority
<b>Address</b>	1600 Gateway Blvd. SE
<b>City, State</b>	Canton, OH
<b>Organization Type</b>	Regional Transit Authority, created under authority of the Ohio Revised code, as a political sub-division of the state of Ohio, with its own voter-approved taxing authority
<b>Training Program Began</b>	2010
<b>Service Area</b>	Stark County, OH, including all cities, villages, and townships
<b>Service Area Population</b>	375,586
<b>Service Area Size (sq mi)</b>	567
<b>Data for Year Ending</b>	July 2013
<b>Annual Training Expenses</b>	\$318,000
<b>Major Funding Sources</b>	FTA Section 5317 New Freedom Program
<b>Partnering Agencies</b>	Human services agencies, school districts

#### Program Description

SARTA's Travel Training Program teaches trainees how to use SARTA's fixed route services, read schedules and plan a trip, locate and transfer to other buses, use SARTA's Proline service, and pay fares and purchase tickets and passes. This program will enable any individual interested in riding SARTA to gain the confidence and knowledge necessary to utilize SARTA services.

To help make trainees comfortable with the SARTA service, a free 31-day fixed route pass is offered to any person over 6 years of age who successfully completes the fixed route travel training program and two one-ride Proline tickets are given to trainees who complete in-person Proline training. Residents are welcome to take the course multiple times, but are only eligible for one 31-day fixed route pass or two Proline passes. Both one-on-one sessions and group sessions are available at different times and days each week. Classes and training for non-English speaking adults, as well as seniors, are conducted.

The program has expanded beyond seniors and persons with disabilities to anyone that needs assistance using the fixed route service, as well as persons who need assistance with Proline. Travel Training has also been extended to public schools.

Teaching methods include:

- Group training and presentations are conducted at senior facilities, churches, neighborhood associations, and schools to

target anyone in the community interested in attending the Travel Training sessions and learning to use fixed route service, including seniors and Proline riders. Travel Training is conducted off-site at homeless shelters, correctional centers, and other nonprofit agencies.

- One-on-one training includes how to use SARTA's fixed route buses and/or Proline buses, read schedules, plan a trip, locate and transfer to other buses, pay fares and purchase tickets and passes, cross streets, deal with emergencies, how to travel safely, find the path to a bus stop (including finding a way for people with vision problems), shadowing as a person develops skills and independence.

The travel training program is highly customized to the needs of each person who wishes to be trained. In many cases, training begins in a group setting. Individuals then request one-on-one training, either in the group setting or later. Individual training often begins with a focus on a specific destination, then broadens to more destinations and general travel. Some follow-up is conducted to ensure that no additional training is needed.

All SARTA travel trainers have attended Easter Seals Project ACTION training.

#### **Key or Unique Factors**

1. The travel training program is well presented on SARTA's website, at the following link: <http://www.sartaonline.com/riding>. The web page includes a travel training video introduction to travel training and a place for people to express interest and request training.
  2. Outreach and education for the travel training program is well integrated with SARTA's broad marketing and branding.
  3. Orientation is well focused, with supporting educational materials, training form, consent form, statement of travel training program principles, and frequently asked questions.
  4. Training is done opportunistically. If an opportunity presents itself, it is taken. For example, a presentation was made to the county agency serving people with developmental disabilities at their in-service staff training.
  5. Detailed records of training are kept in a spreadsheet database, documenting that over 10,000 persons have been trained in group and one-on-one settings.
  6. Comment cards are used successfully to gather feedback from people who have received training. Results are maintained in a database. Almost 2,000 have been received to date.
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# TRAVEL TRAINING

## CENTRAL OHIO TRANSIT AUTHORITY

### COLUMBUS, OHIO



<b>Program Name</b>	<b>Travel Training</b>
<b>Sponsoring Organization</b>	Central Ohio Transit Authority (COTA)
<b>Address</b>	33 North High Street
<b>City, State</b>	Columbus, OH
<b>Organization Type</b>	Public Transportation Authority
<b>Training Program Began</b>	2009
<b>Service Area</b>	Franklin County plus a small part of Delaware County
<b>Service Area Population</b>	1,175,000
<b>Service Area Size (sq mi)</b>	560
<b>Data for Year Ending</b>	2012
<b>Annual Training Expenses</b>	\$50,000 (approximately)
<b>Major Funding Sources</b>	Transit Agency Operating Budget
<b>Partnering Agencies</b>	N/A
<b>Program Description</b>	<p>COTA offers travel training as a personal service that focuses on the customer's needs. Travel training is free and available to those seeking independence by using public transit. The goal of the travel training program is to maximize each individual's ability to travel safely and independently on COTA's fixed route bus service. The program is available to all residents of the COTA service area. COTA also offers free travel training to organizations, as well as to high schools for students who are unable to obtain a driver's license due to their disability. COTA staff will come to organizations to provide transit information and how-to-ride instructions. Referrals come from COTA's paratransit unit and from Central Ohio work incentive (jobs), the school districts, senior housing, and senior centers. The program includes:</p> <ul style="list-style-type: none"> <li>• Fixed Route familiarization—For people who are familiar with the system, but need one-on-one training. This lasts 1–2 days.</li> <li>• Buddy System—For two or more people going to the same location and are trained together.</li> <li>• Group Training—Two-hour presentations that include a review of COTA, a trip on the bus, and discussions about safety. There are generally two of these sessions per month which can be as small as eight or as large as 25 persons.</li> </ul>
<b>Key or Unique Factors</b>	<p>One staff person provides travel training. "This is one of the best programs developed for our customers," according to Carol Perkins, COTA's Director of Mobility Services. The travel training program is dedicated to training individuals to use COTA transportation and has had many successes. "How To Ride Guides" are also available.</p>

# THE RAPID TRAVEL TRAINING

## THE RAPID

### GRAND RAPIDS, MICHIGAN



<b>Program Name</b>	<b>The Rapid Travel Training</b>
<b>Sponsoring Organization</b>	The Rapid
<b>Address</b>	300 Ellsworth SW
<b>City, State</b>	Grand Rapids, MI
<b>Organization Type</b>	Public Transportation Authority
<b>Training Program Began</b>	2005
<b>Service Area</b>	Grand Rapids and the surrounding communities: East Grand Rapids, Kentwood, Wyoming, Grandville, and Walker
<b>Service Area Population</b>	482,740
<b>Service Area Size (sq mi)</b>	185
<b>Data for Year Ending</b>	2013
<b>Annual Training Expenses</b>	Estimated as \$29,200 (salary only)
<b>Major Funding Sources</b>	Transit agency operating budget
<b>Partnering Agencies</b>	None
<b>Program Description</b>	<p>The Rapid offers two programs designed to help those who need extra assistance using the bus. The first is travel training which offers one-on-one training for people with disabilities. The travel trainer plans the client's route, rides with him or her during training, and stays in contact with the client to monitor progress. The second program is Senior Mentors (also called Volunteer Mentors, when they are helping non-seniors). The Senior Mentors program pairs an experienced volunteer with any senior who would like to feel more comfortable using the bus system. The mentor provides all the information, plans the route to a destination of the client's choosing, and goes with the new bus rider. The mentor also gives the participant a free 10-ride fare card to start his or her bus travels, which is considered to be an important incentive to use the bus for this population.</p> <p>Group orientations are offered to seniors, especially for those not used to coming downtown. It is also a way to entice people to come downtown and experience the arts/culture. Sessions are often tied to special events downtown such as health fairs for groups of seniors or attending a matinee at the arena—and make use of a transit bus which will drive through the central station. A Senior Mentor will often accompany the group to talk about bus safety and her/his own experiences after the coordinator has given a more general overview.</p>
<b>Key or Unique Factors</b>	The target audience for the travel training program is persons with disabilities. The target audience for the Senior Mentors program is seniors age 60 and older without a disability. For the travel training

program, the travel trainer plans the client's route, rides with him or her during training, and stays in contact with the client to monitor progress. The focus of the training is essentially route training—the participants generally have the basic skills but need help with specific routes. For the Senior Mentor's program, the process begins by pairing first-time or inexperienced riders with trained volunteers who act as personal guides for the senior or even a group of seniors. Both one-on-one training and "ride-alongs" are used in the programs. There is little to no use of classroom-based teaching, as the coordinator believes that training while using the actual transit system is more effective. The coordinator of the travel training program follows up with participants for up to 3 months.

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# LAKETRAN TRAVEL TRAINING

## LAKETRAN

### GRAND RIVER, OHIO



<b>Program Name</b>	<b>Laketrans Travel Training</b>
<b>Sponsoring Organization</b>	Laketrans
<b>Address</b>	P.O. Box 158
<b>City, State</b>	Grand River, OH
<b>Organization Type</b>	Regional Transit Authority, created under authority of the Ohio Revised code, as a political sub-division of the state of Ohio, with its own voter-approved taxing authority
<b>Training Program Began</b>	2008
<b>Service Area</b>	Lake County, OH, including all cities, villages, and townships
<b>Service Area Population</b>	229,885
<b>Service Area Size (sq mi)</b>	227
<b>Data for Year Ending</b>	Calendar Year 2012
<b>Annual Training Expenses</b>	\$15,914 (partial year only)
<b>Major Funding Sources</b>	FTA Section 5317 New Freedom Program
<b>Partnering Agencies</b>	Agencies serving seniors and people with disabilities; school districts

#### Program Description

Laketrans's Travel Training Program provides quality personalized one-on-one instruction for any individual who would like to use the public transportation system. Group orientation sessions are available, as well as one-on-one training. One-on-one travel training involves a series of steps from initial one-on-one instructor assistance to gradual fading of trainer assistance, which leads to independent travel by the individual. Individuals who need assistance to learn the public transportation system can receive one or both of the following types of travel training:

Destination Travel Training which teaches the individual to go to and from a specific destination, usually on a daily basis, or General Travel Training which provides the individual with more complex instructions. The individual is taught to use the bus for general travel, selecting destinations of his/her choice. Included in this training is learning to read the bus schedules.

Target audiences for travel training include:

- Seniors, persons with disabilities, youth. Any person who is 14 years of age or older is eligible. Parental or caseworker consent is required for any person under 14 years old. Travel training will be provided to anyone without transportation, non-drivers, seniors and caregivers, youth, people with disabilities, people looking to save on the cost of transportation, HHS/social services agency staff (social workers and case managers).

- Travel training is customized for seniors; people with disabilities, students in grades 4 through 12, or aged 10 and up; high school students with disabilities.
- Travel training is offered to individuals preparing to finish school and enter job training.

Targeted travel training methods include:

- Seniors in small-group settings, such as senior centers, veterans groups, and senior living facilities. Training for seniors typically begins with a group presentation at a senior center, with one-on-one training for seniors who express an interest. Laketrans works with social services professionals and families who are trying to encourage a senior to stop driving. Presentations are made to groups of caregivers. Area senior centers receive presentations at least once a year.
- Students in grades 6 to 12 through a Class Pass Travel Training program, a program that combines experiential educational outings with the use of transit. The program includes a short training session on public transit planning a few days prior to a trip, and then allows for a classroom on-board excursion on Laketrans fixed route. Each Class Pass can accommodate up to 20 students and chaperones. It is also available to student groups for ages 10 and up.
- High school students with disabilities transitioning from high school upon graduation. Laketrans will provide a staff member to be present during an Individualized Education Program (IEP) to assist in clarifying transit-related goals.
- Adults with disabilities—either developmental or mental health disabilities—receive individualized travel training. Travel trainers meet with case managers or job coaches to create goal plans to meet individual goals of clients.

#### Key or Unique Factors

1. Carefully differentiated elements of the training, such as route training, selecting destinations, trip planning, map navigation, bus schedule reading, fare payment, bus etiquette, street crossing, emergency skills, appropriate social behavior, and safety skills.
2. Sustained, stable funding since 2008 through the FTA Section 5317 New Freedom Program.

# VALLEY REGIONAL TRANSIT TRAVEL TRAINERS

## VALLEY REGIONAL TRANSIT

### MERIDIAN, IDAHO



<b>Program Name</b>	<b>ValleyRide/Valley Regional Transit Travel Trainers</b>
<b>Sponsoring Organization</b>	Valley Regional Transit through RideLine
<b>Address</b>	700 N. East 2nd St. Suite 100
<b>City, State</b>	Meridian, ID
<b>Organization Type</b>	Public Transit Provider
<b>Training Program Began</b>	The Travel Training program started in 2010 as part of a mobility management program with funding from a grant.
<b>Service Area</b>	Ada and Canyon Counties. People who live outside these areas but want to use transit in the two counties can participate in the training. Anyone needing one-on-one assistance within the service area is eligible to participate in the training.
<b>Service Area Population</b>	581,288
<b>Service Area Size (sq mi)</b>	1,663
<b>Data for Year Ending</b>	2012
<b>Annual Training Expenses</b>	\$110,000 (varies due to local match and other cooperative programs).
<b>Major Funding Sources</b>	Travel training is funded through larger mobility management program funding that is sponsored through grants such as JARC or New Freedom.
<b>Partnering Agencies</b>	Formal and informal partnerships with various human services agencies in the community. Extensive community outreach and training of “outside” agency personnel is ongoing.
<b>Program Description</b>	<p>Travel training is offered free of charge from Valley Regional Transit Travel Trainers program. The program helps people plan trips and trainers will ride with clients to destinations. The travel training program’s features include trip planning and route escorts, customized service for each person to successfully use public transportation, and services for everyone, including seniors and people with disabilities. Group training and presentations are available upon request. Planned expansion of the program includes adding non-English language capabilities and providing training for transportation options in addition to transit.</p> <p>The program has one trainer with experience in developmental program management, elder care, emergency medicine, and vehicle fleet operations.</p>
<b>Key or Unique Factors</b>	<p>The Travel Training Program is for anyone, of any age and ability, who is interested in riding the ValleyRide bus system independently.</p> <p>Trainers assist participants to understand trip planning, transit routes, how to locate and transfer to other buses, read and understand route maps and schedules, purchase fares and passes, use the wheelchair lift and ramps, position mobility devices in the bus, ride with service animals, and ride independently and with confidence. Training is generally individualized to the exact places people travel to so they can become comfortable with the route. Post-training follow-up is done at 1 month and 3 months after training. A survey is also sent out to gather feedback. Individuals can fill it in anonymously or give their name. This information from the survey is used to improve the program.</p>

# MONTEREY-SALINAS TRANSIT TRAVEL TRAINING

## MONTEREY-SALINAS TRANSIT (MST)

### MONTEREY, CALIFORNIA



<b>Program Name</b>	<b>Monterey-Salinas Transit Travel Training</b>
<b>Sponsoring Organization</b>	Monterey-Salinas Transit (MST)
<b>Address</b>	One Ryan Ranch Road
<b>City, State</b>	Monterey, CA
<b>Organization Type</b>	Public Transit Agency
<b>Training Program Began</b>	2008
<b>Service Area</b>	Carmel, Del Rey Oaks, Gonzales, Greenfield, King City, Marina, Monterey, Pacific Grove, Salinas, Sand City, Seaside, Soledad, and Monterey County
<b>Service Area Population</b>	415,057, with an estimated 352,000 population in areas within 3/4 mile of established fixed routes in the county
<b>Service Area Size (sq mi)</b>	280
<b>Data for Year Ending</b>	2012
<b>Annual Training Expenses</b>	\$200,000
<b>Major Funding Sources</b>	New Freedom Grants, including 20% match
<b>Partnering Agencies</b>	United Way, medical, social services, and transit providers
<b>Description of the Program</b>	MST offers travel training to individuals, groups, and organizations. Training involves a bus ride (“rolling classroom”) accompanied by the travel trainer to a specific desirable destination as a way of attracting individuals to travel training. Participants receive training on trip planning; understanding route maps, stops, schedules, and landmarks; bus stop and bus access safety; paying fares and purchasing passes; planning for a specific route; transferring to other buses; and using a mobility device when riding. Participants receive practical instruction and safety tips involving equipment demonstrations, hands-on experiences, and get individualized training plans. In 2013, MST started offering more group trips and less individual trainings so they could reach many more people who could benefit from fixed route transit as an alternative to more expensive paratransit services. The one-on-one training is individualized, takes longer to complete, and in the last year has targeted cognitively impaired individuals who might require additional personalized training. Navigators (trained volunteers) provide follow-up training after an initial training provided by travel training staff.
<b>Key or Unique Factors</b>	In the Navigators Volunteer Program, volunteers are trained as travel trainers to support the work of paid trainers. Trainees receive 12 hours of classroom and field training, are screened (drug and background checks and references), and serve a day or two a week in senior centers to provide orientation and senior travel training.

# INTERCITY TRANSIT TRAVEL TRAINING PROGRAM

## INTERCITY TRANSIT OLYMPIA, WASHINGTON



<b>Program Name</b>	<b>Intercity Transit Travel Training Program</b>
<b>Sponsoring Organization</b>	Intercity Transit
<b>Address</b>	526 Pattison SE
<b>City, State</b>	Olympia, WA
<b>Organization Type</b>	Public Transportation Benefit Area (PTBA)
<b>Training Program Began</b>	2001
<b>Service Area</b>	Thurston County, WA: Olympia, Lacey, Yelm, Tumwater
<b>Service Area Population</b>	163,360
<b>Service Area Size (sq mi)</b>	97
<b>Data for Year Ending</b>	2012
<b>Annual Training Expenses</b>	\$83,324—Includes the cost of one travel trainer and training and travel for the travel trainer.
<b>Major Funding Sources</b>	Program is funded through local sales tax dollars.
<b>Partnering Agencies</b>	N/A
<b>Description of the Program</b>	<p>Training begins with one-on-one instructor assistance. The participant learns step by step how to get where he or she needs to go independently using transit. Each training program is individually tailored to the participant's needs and will help the participant learn how to:</p> <ul style="list-style-type: none"> <li>- Plan a trip.</li> <li>- Ride specific routes.</li> <li>- Read and understand route maps and schedules.</li> <li>- Get to and from a desired bus stop.</li> <li>- Recognize bus numbers, bus stops, and landmarks.</li> <li>- Pay fares and purchase passes.</li> <li>- Get on and off the bus safely.</li> <li>- Use the lift to board with a mobility device.</li> <li>- Position a mobility device on the bus.</li> <li>- Locate and transfer to other buses.</li> <li>- Get service information.</li> <li>- Travel independently and confidently riding the bus.</li> </ul>
<b>Key or Unique Factors</b>	The Intercity Transit Travel Training Program not only responds to client referrals, but also provides community outreach to identify new markets and referral sources.

# SAMTRANS MOBILITY AMBASSADOR PROGRAM

## SAN MATEO COUNTY TRANSIT DISTRICT

### SAN CARLOS, CALIFORNIA



<b>Program Name</b>	<b>SamTrans Mobility Ambassador Program</b>
<b>Sponsoring Organization</b>	San Mateo County Transit District (SamTrans)
<b>Address</b>	1250 San Carlos Ave., P.O. Box 3005
<b>City, State</b>	San Carlos, CA
<b>Organization Type</b>	Public Transportation Authority
<b>Training Program Began</b>	2010
<b>Service Area</b>	San Mateo County
<b>Service Area Population</b>	718,451
<b>Service Area Size (sq mi)</b>	448
<b>Data for Year Ending</b>	FY2013
<b>Persons Trained per Year</b>	Average of 133 per year over 4 years
<b>Annual Training Expenses</b>	Average annual cost to operate the travel training program (Mobility Ambassadors) is \$69,000 over a 5-year period.
<b>Major Funding Sources</b>	The District was awarded four Federal New Freedom (5317) grants from the Metropolitan Transportation Commission to develop and implement various mobility management services for seniors and people with disabilities in San Mateo County. Matching funds are provided by the District.
<b>Partnering Agencies</b>	San Mateo County Senior Mobility Initiative
<b>Description of the Program</b>	<p>The Mobility Ambassador Program trains volunteers to help older adults and people with disabilities learn to use transit and understand their full range of transportation options. Ambassadors can help with many transportation-related issues, including planning a trip using public transit, finding a driver safety class, and learning about alternatives to driving, such as community shuttles. Ambassadors can also give educational presentations, conduct group and one-on-one rider training, and organize group trips on transit to interesting destinations.</p> <p>The program's mission is to teach people how to travel independently. The program is complemented by travel training of ADA-eligible persons by professional travel trainers.</p>
<b>Key or Unique Factors</b>	San Mateo County trains volunteers to conduct travel training. Additionally, the program takes a mobility management approach by helping seniors and people with disabilities with their full range of transportation options according to their individual trip needs.

# MOBILITY OPTIONS PROGRAM

## SANTA CLARA VALLEY

### TRANSPORTATION AUTHORITY

#### SAN JOSE, CALIFORNIA



<b>Program Name</b>	<b>Mobility Options Program</b>
<b>Sponsoring Organization</b>	Santa Clara Valley Transportation Authority (VTA)
<b>Address</b>	3331 North First Street
<b>City, State</b>	San Jose, CA
<b>Travel Training Began</b>	2009
<b>Organization Type</b>	Public Transportation Authority
<b>Service Area</b>	Santa Clara County
<b>Service Area Population</b>	1,781,642
<b>Service Area Size (sq mi)</b>	1,290
<b>Data for Year Ending</b>	2010
<b>Annual Training Expenses</b>	\$151,418 (New Freedom Large Urbanized Area (UA) Projects)
<b>Major Funding Sources</b>	California Department of Transportation
<b>Partnering Agencies</b>	Social Services Agency Partners
<b>Description of Program</b>	<p>The goal of the Mobility Options Program is to promote independent travel options for people with disabilities and seniors in Santa Clara County by providing training opportunities. The program includes online instructional videos, offers group travel training, and has Information Service Representatives available to answer questions and plan trips. VTA publishes a <i>Senior Mobility Guide</i> arranged in sections that provide information on public transportation and other transportation options. VTA's Mobility Options Program offers free group training to help persons with disabilities and older adults learn to use bus and light rail systems safely and confidently to get to places like shopping malls, medical facilities, recreation areas, civic buildings, and colleges. The VTA travel trainer customizes the learning experience to meet the needs of the individual. The step-by-step process emphasizes safety while building confidence and travel skills. The length of the program is based on the individual's need. VTA offers "Daycations" to help our senior riders learn how to better use the VTA system. A VTA speaker hosts morning trainings immediately followed by a free guided bus and/or light rail ride to entertainment or shopping venues of their choice in Santa Clara County. The Train the Trainer Academy is a free comprehensive training for care providers and senior volunteers that provides a foundation to teach seniors how to safely and confidently use public transportation. The training consists of classroom and field instruction.</p> <p>From May 2009 to May 2012, Santa Clara Valley Transportation Authority offered free one-on-one travel training. When the New Freedom grant cycle ended in May 2012, VTA decided to refer persons with disabilities and seniors to their community partners for one-on-one travel training. This has enabled more individuals to receive one-on-one travel instruction.</p>
<b>Key or Unique Factors</b>	The program combines group and peer training in a system that emphasizes a mobility management framework.

## STA MOBILITY TRAINING

### SPOKANE TRANSIT AUTHORITY (STA)

### SPOKANE, WASHINGTON



<b>Program Name</b>	<b>Spokane Transit Authority (STA)—Mobility Training</b>
<b>Address</b>	1230 W Boone Ave
<b>City, State</b>	Spokane, WA
<b>Sponsoring Organization</b>	STA and Innovative Paradigms, a division of Paratransit, Inc. of Sacramento, California
<b>Year Established</b>	2006
<b>Organization Type</b>	Public Transit Provider
<b>Service Area</b>	85% of Spokane County's population is included the Public Transportation Benefit Area (PTBA) formed in 1981 when voters approved the PTBA's establishment to operate Spokane Transit.
<b>Service Area Population</b>	471,221
<b>Service Area Size (sq mi)</b>	248
<b>Data for Year Ending</b>	2012
<b>Annual Training Expenses</b>	\$235,000
<b>Major Funding Sources</b>	New Freedom Transit Grant for 2005-2012
<b>Partnering Agencies</b>	Innovative Paradigms team, Paratransit, Inc.—Contracting Company
<b>Description of the Program</b>	<p>Spokane Transit Authority mobility trainers will familiarize each trainee with how the system works, from bus routes to ticketing, and most importantly, how the system can work to meet each specific trainee's needs. If the trainee is hesitant to ride the bus, the mobility training program will give the trainee the confidence needed to become comfortable and in control of their schedule and their life. The trainer will determine each trainee's needs and design an individualized training plan, including one-on-one instruction while actually riding the bus with each trainee. The trainer teaches the trainee everything needed to ride the bus safely and successfully. The trainer plans each trainee's trip using the easiest and fastest route available. The trainer teaches the trainee how to read and understand route maps, schedules, and reader boards as the trainee reaches his/her own specific destination(s). The trainee will learn how to openly communicate with drivers, how to transfer to other buses, and how to board and exit buses safely using lifts or ramps when using a mobility assistive device. The trainee also learns how to maneuver her/his wheelchair or scooter into the bus securement locations, identify landmarks and bus stops, safely travel to and from bus stops, and pay fares or purchase passes.</p>
<b>Key or Unique Factors</b>	<p>Spokane Transit Authority uses "Smart Card" technology to track the use of public transit by mobility training program graduates. In recent years the program has allowed the transit provider to avoid or defer nearly 32,000 paratransit (ADA) trips per year, resulting in a cost avoidance of \$633,989 per year.</p> <p>Spokane Transit has a mobility training video that is an excellent introduction to travel training for persons interested in receiving training. The video is available at <a href="http://www.spokanetransit.com/ride-sta/view/mobility-training">http://www.spokanetransit.com/ride-sta/view/mobility-training</a> or <a href="http://vimeo.com/10966041">http://vimeo.com/10966041</a>.</p>

# WMATA'S TRAVEL TRAINING AND OUTREACH

## WASHINGTON METROPOLITAN AREA TRANSIT AUTHORITY

### WASHINGTON, D.C.



<b>Program Name</b>	<b>WMATA's Travel Training and Outreach</b>
<b>Sponsoring Organization</b>	Washington Metropolitan Area Transit Authority (WMATA or Metro)
<b>Address</b>	600 5th Street, NW
<b>City, State</b>	Washington, D.C.
<b>Training Program Began</b>	2004
<b>Organization Type</b>	Public Transit Authority
<b>Service Area</b>	Washington, D.C. plus Montgomery and Prince George's counties in Maryland and Arlington and Fairfax counties and the cities of Alexandria, Fairfax, and Falls Church in Virginia
<b>Service Area Population</b>	3,500,000
<b>Service Area Size (sq mi)</b>	1,500
<b>Data for Year Ending</b>	2012
<b>Annual Training Expenses</b>	Approximately \$500,000
<b>Major Funding Sources</b>	Participating jurisdictions and fares, some federal grant funds
<b>Partnering Agencies</b>	MTM Transportation, ENDependence Center of Northern Virginia, Independence Now (in Maryland), Lighthouse for the Blind
<b>Program Description</b>	<p>Metro offers free travel training sessions and provides hands-on learning for its accessible Metrorail and Metrobus and partner bus systems for persons with disabilities and older adults. These sessions are available one-on-one or in group sessions. Group trainings can occur at residential facilities, senior programs, partner locations, or other sites. During the travel training, customers learn everything from trip planning, to how to locate Metrobus stops and Metrorail stations, to how to purchase a fare card and navigate the system. Training sessions are customized based on an individual's needs. Metro offers more intensive and comprehensive, individualized travel training for people with significant disabilities who may benefit from the basic individual Metro system orientations that Metro provides. Train the Travel Trainer workshops inform travel trainers and orientation and mobility trainers about Metro's bus and rail system accessibility and safety features so that they may incorporate this information into their existing travel training programs for people with disabilities. Metro's trained partners also provide travel training to their consumers, and Metro promotes referrals back and forth among their partners for transportation and other needs.</p>

**Key or Unique Factors**

There is a strong focus on using the travel training program as a demand management strategy for ADA paratransit. A special report on Metro's Eligibility Certification Travel Training and Transit Options Program estimated possible savings of \$1.5 million in FY 2011-2012 from the travel training program for persons with disabilities and older adults. With their partners and other agencies, WMATA has a focus on a more holistic approach to "treating more of the person," which means building life skills and addressing many of an individual's life-sustaining and social needs, not just learning how to travel. These efforts emphasize informing individuals about the numerous resources in their communities, including travel options. An upcoming program will create certifications for travel trainers and build a local mutual support network for travel trainers.

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## CHAPTER 6

# Key Research Questions and Findings

This study examined a number of specific research questions. Because data to investigate these questions typically came from the local travel training programs, the analyses that were possible were limited by the available data. Thus, the insights that were gained into these research questions need to be understood as insightful observations rather than the results of large-scale data analyses. Nonetheless, these insights should prove useful to individuals interested in improving the practice of travel training.

Because most of these questions have been discussed in-depth in previous sections of this report or in *TCRP Report 168: Travel Training for Older Adults, Part I: A Handbook*, the results of these investigations are summarized here.

### What Are the Key Components of Effective Travel Training Programs?

Effective travel training programs for older adults can be complex to design and deliver, but they should be simple and understandable to older travel trainees. To be effective, programs should contain the following elements:

1. Philosophy, vision, and mission: first focus on customer service.
  2. Focus on individual abilities and learning patterns.
  3. Professional, well-trained staff.
  4. Well-developed travel training curricula.
  5. Strong program partners—including public transit systems.
  6. Community outreach and education.
  7. Rigorous procedures for identifying all program costs.
  8. A program for tracking the results of travel training completed.
  9. Outcome measures for individuals and the program as a whole.
  10. Stable and sustainable funding.
- **Philosophy, vision, and mission: first focus on customer service:** Travel training programs should be designed to

serve older adults, with savings in public transportation costs being a result, but not the primary objective of the training program. A central element should be a social services model of service delivery, meaning a central focus on meeting the needs of older adults and the skills they require to remain active, mobile, and independent, and to age in place. Transportation cost savings will result, but should not be the primary goal of a travel training program.

- **Focus on individual abilities and learning patterns:** Effective travel training has a strong individual focus, with a strong emphasis on individual abilities and learning patterns.
- **Professional, well-trained staff:** The travel training program should be staffed with professionals who understand a social services model of program delivery and who understand the travel needs of older adults. They should have the ability to evaluate travel training candidates and be able to recommend appropriate training, whether that training is for fixed route or paratransit service.
- **Well-developed travel training curricula:** Travel training curricula should be developed and organized to serve the diversity of travel training needs present among older adults. Curricula need to encompass individual, group, and follow-up, or refresher, training. In some circumstances, group training may be sufficient but some older adults will require individualized training tailored to their capabilities, experience, environment, and trip destinations they need to reach. Some travel trainees may require periodic retraining.
- **Strong program partners—including public transit systems:** The first program partner should be the organization that sponsors the travel training program. Program partners are essential to success. Partners include public transit systems if the travel training program is set up outside the public transit system. Program partners should include human services agencies that provide services to older adults, organizations that advocate for older adults, and places where older adults gather.

- **Community outreach and education:** Broad community support matters, from local governments which serve and care about older adults in their community to the general citizenry who take pride in their community. Outreach and education begins with program partners, so they fully understand the program, how it operates, and how older adults and the community may benefit. Outreach is important to other community organizations that may help older adults become aware of the travel training opportunities. Outreach also builds support within the business community.
- **Rigorous procedures for identifying all program costs:** Travel training programs need to adopt and apply industry-wide standards of fully allocated cost accounting principles and performance measures for all travel training programs. Industrywide standards are needed for common charts of accounts to record all costs incurred.
- **A program for tracking the results of travel training completed:** Measuring results is important for a number of reasons, including documenting the benefits that older adults receive. The industry needs agreed-upon standards for measuring program outputs, outcomes, and benefits. Benefits can be measured in a number of ways. Surveys of travel trainees can measure benefits of training immediately upon completion of training and at 3-, 6-, 9-, and 12-month intervals. Equally important are program results, including benefits reported by trainees who are older adults.
- **Outcome measures for individuals and the program as a whole:** Outcome measures should focus on measuring individual results and overall program results. Measuring individual results shows the direct benefits to trainees. Measuring program results shows aggregate benefits to older adult trainees and measures of the effectiveness of the program overall, including cost savings for public transportation and other providers. Demonstrated cost savings are likely to be critical to obtaining sustainable funding for the travel training program, and documentation of them will help support sustainable funding.
- **Stable and sustainable funding:** Sustainable funding is critical to support a successful travel training program, which will incur expenses for staffing, support materials, facilities, and general operating support. The savings in paratransit service by increased use of fixed route service and additional farebox revenues from older adults who never used paratransit service, but now ride fixed route service, will generate a financial benefit for public transit systems that exceeds their cost.

For more information, see the section entitled “What Makes an Effective Travel Training Program?” in Chapter 4 of *TCRP Report 168: Travel Training for Older Adults, Part I: A Handbook*.

## How Can Effective Travel Training Programs Be Established?

Setting up a travel training program for older adults requires a sequence of steps that help establish the details of the program and confirm the support and participation of key community stakeholders. A series of seven steps should lead to a viable program.

1. **Establish a mission statement and set goals:** When setting up a travel training program, it is important to develop a mission statement of what it will try to accomplish. Goals should be achievable and measurable. Other travel training programs should be contacted and asked what they did to get started, what funding was needed to get started, and how many hours were needed to start and run a program.
2. **Gather stakeholders:** This could be done by establishing a working group or some other administrative structure that meets the needs of the local community. The stakeholders in the community could include the transit organization or organizations, senior living facilities, and other senior-oriented organizations.
3. **Design the travel training program:** Existing and potential local conditions should be analyzed; these conditions should include demographics, spatial distributions, transportation services and areas they serve, potential program partners, and how the private sector can support and contribute to the program. Alternative options should be designed and assessed to find the best option or options. Travel training procedures should include a manual of what travel training means to the local community. A program that is flexible and scalable should be created based on need and budget restraints.
4. **Confirm funding:** A budget that suits local community resources and needs should be **established**. Funding sources should be identified and funding obtained for the travel training program.
5. **Establish administrative and other methods:** Data collection systems and administrative protocols need to be established, and forms to capture key information on the costs and the results of these programs, including the participants who use the programs, need to be developed. It is important for data to be collected in similar formats to capture key information; this will help to measure the program’s success in future years.
6. **Conduct a pilot test:** The program that was developed among the stakeholders should be pilot tested by offering it to older adults and collecting information on expenses and outcomes. After the pilot test is completed, the outcomes need to be evaluated. This should include feedback from the stakeholders and from the customers.

7. **Evaluate the outcomes; modify goals and activities as needed:** Formal methods for obtaining data on the inputs and outputs of the travel training program should be established and feedback loops to initial goals and plans and continuous improvement cycles to refine and improve the program should be created.

For more information, see the section entitled “How Do You Set Up an Effective Travel Training Program in Your Community?” in Chapter 4 of *TCRP Report 168: Travel Training for Older Adults, Part I: A Handbook*.

### **What Kinds of Resources Are Needed for an Effective Travel Training Program?**

Cost per person trained in travel training programs would certainly be a useful measure for comparing and contrasting travel training programs, but cost information is not currently available for specific individual components of travel training programs, such as one-on-one training (very expensive), group training (relatively low cost), or orientations (very low cost). In addition, training costs are not currently separated for persons with disabilities and older adults, nor is it certain that all travel training programs are recording the same expenses in a consistent fashion. These issues make all currently available cost-per-person comparisons considerably less precise than would be desired. Currently reported travel training costs—which are averages including all types of training and all types of persons—range from a little more than \$300 to more than \$1,500 per person.

Because many of the 20 case study sites applied significantly different procedures to recording and reporting their budgets, expenses, and results, great care is needed when discussing reported budgets and expenses. To no one’s surprise, programs that trained large numbers of persons and included many kinds of activities showed larger expenses. Annual expenses reported ranged from tens of thousands of dollars for programs operating for only parts of a year or only reporting labor costs but no other costs to hundreds of thousands of dollars for the most robust programs. Among the seven in-depth case studies, the annual expenses reported ranged from a bit more than \$145,000 (Boulder) to \$855,000 (the RTA in Chicago, which reported the largest number of trainees of the cases studied). (Note: Because accounting and reporting procedures differed from site to site, the expenses and results reported by the case studies may not be strictly comparable. A key industry objective should be to make reporting procedures more comparable.)

Most programs are dependent on a few but highly focused funding sources, including state departments of transportation, state transit agencies, or local government agencies. Most programs have resource needs and resources that are

very specific to local conditions. These programs obtained funding from the following sources, although none of these programs obtained funding from all of these sources:

- The Federal Transit Administration (FTA) Job Access and Reverse Commute program (JARC).
- The FTA New Freedom program.
- State DOT funds.
- Other state funds (for example, departments of rehabilitation).
- FTA Section 5310 funds.
- United Way.
- Local governments.
- Local transit systems.
- Foundations.

Among the seven in-depth case study programs, a significant proportion of their funding came from the federal JARC and New Freedom programs. The 2012 MAP-21 legislation changed FTA program funding in ways that may make the use of JARC and New Freedom resources more difficult to obtain for travel training programs.

For more information on funding sources, see the section entitled “What Resources Are Needed for an Effective and Sustainable Travel Training Program?” in Chapter 4 of *TCRP Report 168: Travel Training for Older Adults, Part I: A Handbook*.

### **What Were the Obstacles to Participation? How Were They Overcome?**

Based on the case studies conducted, the potential challenges of creating a successful travel training program might include the following:

**Maintaining consistent program funding streams** can be the biggest challenge travel training programs face. Funding for travel training is not ensured; a lack of funding may limit the full potential of any travel training program. It is difficult to plan for the future or expand program efforts in the absence of stable and adequate sources of funding. Funding issues can be complicated due to the variety of travel training operating models, differences between states, and changes in the federal program structure. Funding is always subject to the issues associated with local, state, and federal budgets.

**The nature of travel training programs** may in itself be challenging. These programs involve equipping individuals to explore, use, and then thrive in environments that they may consider as new, foreign, or even threatening. Many older adults perceive losing their ability to drive as the first step in giving up their independence. Due to lack of

experience with fixed route transit, individuals may have misconceptions about the safety and flexibility of using public transportation. Family members may also have concerns about the idea of their older family member using fixed route transit. These perceptions can be overcome through training, but they may discourage some older adults from even entering a travel training program.

- Travel training programs are the type of programs in which costs are incurred first, but some of the benefits, including cost savings, accrue months or even years later. This means that tracking the costs of and benefits of travel training and documenting public transit cost savings needs to be a key task of the programs.
- Extreme weather conditions can be a disincentive for some older adults to travel to training programs or other destinations.
- On a personal level, many of the functional ability losses that can lead to older adults having to give up driving can also preclude them from using public transit even if it is available, so there are some limitations on who can benefit from travel training.

**Outreach** is critical because bringing older adults into a travel training program can be challenging for a number of reasons:

- The frequently negative media culture surrounding the use of public transit.
- Difficulties in identifying a continuing stream of trainees.
- The natural reluctance among some older adults to ask for assistance while traveling.
- Concerns for individual safety or welfare.
- Limitations in funding and staffing.
- The persistence needed to ensure that older adults, once trained, are traveling at stable or increasing rates.

**Collaboration** is key to developing a successful travel training program. It takes time and resources to establish and nurture relationships among transit agencies and with the senior living communities and the agencies that work with older adults, but creating this collaborative working relationship will benefit the travel training program and the community in the long run. Collaboration with transit agencies is a key to ensuring that their services are sensitive to the needs of the older adult population, that routes provide access to destinations where concentrations of older adults live and socialize, and ensures that the needs of transit agencies are met by providing growth potential for fixed routes, increasing ridership, and potentially savings from deferred paratransit trips.

**Problems with the infrastructure of the public transit system in the community** (e.g., having buses available, having

bus stops that are accessible, having services at the right times and to many destinations) may limit who can benefit from travel training. Some communities will need coordination across political jurisdictions and among transit agencies, particularly in terms of scheduling, route connections, and fare media. Environmental obstacles can include uneven terrain and poor or lack of curbing at bus stops.

For more information, see the section entitled “What Are Some Obstacles That Your Travel Training Program Might Encounter?” in Chapter 4 of *TCRP Report 168: Travel Training for Older Adults, Part I: A Handbook*.

## Are Special Travel Training Programs Needed in Rural Areas?

Whether operating in urban or rural areas, effective travel training programs are sensitive to local characteristics, including demographic and economic characteristics of the population, local transportation resources, local funding sources, and spatial relationships of activities. If these sensitivities are evident, the differences between urban and rural training programs are not large. The kinds of rural community features that must be considered may include:

- Limited local transportation resources.
- Many individuals may have had no previous experiences with public transportation, so overcoming initial fears and misperceptions can become a large part of travel training.
- Trips may require covering large distances in large amounts of time.
- Unique ethnic and cultural norms may need to be considered.
- A close personal knowledge of the individual and her/his immediate local travel options may be needed.
- Individuals needing travel training may need assistance in accessing a wide range of public and other services.

## Pending Issues

A number of interesting research issues could not be resolved at this time due to incomplete data. These include the following:

- What constituted an effective marketing program?
- What kinds of incentive programs were effective?

In both cases, potentially effective programs were observed but there was no information available concerning their effectiveness.

## CHAPTER 7

# Suggestions for Further Research

The most substantial currently unresolved issues in travel training involve the precise calculation of the costs and benefits of travel training programs. These should be the primary foci of future research efforts in travel training.

### Reporting the Costs of Travel Training Programs

In this project's 20 case studies, there was substantial evidence of wide variations in the ways that program costs were reported. Previous research (Burkhardt, et al. 2011) has identified the kinds of costs that need to be considered in describing any programs including transportation services. The recommended approach is called full cost accounting: its basic tenet is to account for all resources necessary to produce a particular service, including all capital, operating, and administrative costs. Detailed expense classes should include the following:

- Labor.
- Fringe benefits.
- Purchased transportation.
- Contracted services.
- Materials and supplies.
- General administrative expenses (including indirect organizational costs, if applicable).
- Utilities.
- Casualty and liability costs.
- Taxes.
- Miscellaneous expenses.
- Leases and rentals.
- Capital expenses.
- Depreciation and amortization.

Regarding the travel training programs examined, cost categories that seemed to be not reported for a number of the case studies include administrative labor and overhead, general administrative expenses (including indirect organizational

costs), leases and rentals, capital expenses, and depreciation and amortization. Underreporting such costs can lead to cost reports that are unrealistically low. Even when the costs reported seemed accurate, there was no assurance that the same costs were being reported by all travel training programs.

Future research efforts could focus on detailed on-site work with travel training programs to understand their charts of accounts for financial reporting and to make the necessary adjustments. This would allow more accurate cost analysis of these programs. An alternative means of obtaining more accurate information would be for funders or the Association of Travel Instruction to issue guidance on a resource-based, full cost accounting system and to work to ensure that this guidance was followed.

### Identifying the Benefits of Travel Training Programs

As previously noted, a framework for estimating the costs and benefits of travel training has been described by Wolf-Branigin and Wolf-Branigin (2010). Their evaluation report discussed the potential cost savings of travel training in the following way: "Travel training for ADA paratransit customers is a means of reducing transportation agency costs by equipping and encouraging these customers to travel on the fixed route system." Their cost-benefit model was developed through a series of expert panels and conferences to identify all the costs and benefits. The costs in the model included the following:

- Vehicles and equipment to provide travel training (variable a).
- Travel training personnel (variable b).
- Supplies, equipment, and office space (variable c).

The benefits included increased taxes paid by customers (variable y) and cost avoidance (the cost of paratransit trips not provided minus the cost of the fixed route trips taken instead, variable z).

The cost/benefit ratio was calculated as:  $(y + z)/(a + b + c)$ . The net benefit was calculated using the following:  $(y + z) - (a + b + c)$ .

Using this model, and based on work with three public transportation agencies, the researchers concluded that travel training services can save public transportation agencies money, even though the model described omits consideration of a substantial number of benefits to the trainees of the travel training programs. These benefits were listed by the authors in an earlier paper (Wolf-Branigin and Wolf-Branigin, 2010) and included the following:

- Changes in income for trainees after training.
- Projected funds spent by trainees due to independent travel.
- Trainee out-of-pocket expenses.

As discussed in Chapter 2, there are many significant benefits to individuals who participate in travel training. These benefits, many of which have not yet been quantified in terms of monetary value, include the following:

- Increased mobility.
- Improved travel attributes, such as no need to make advance reservations, less dependence on paratransit, and less dependence on family and friends for rides.
- Quality of life improvements, such as aging in place in one's own home or traveling spontaneously according to individual needs or desires.
- More control over one's own activities and schedule.
- Improved social connectedness, helping people become active community members.
- Economic benefits from offering lower costs for riders than some alternatives:
  - In many communities, older adults enjoy half-price fare on public bus and rail systems, versus two times regular fare for ADA-eligible paratransit rides.
  - Fixed route public transportation costs are generally lower than most other travel alternatives, including ADA paratransit services.

- Other economic benefits are reduced health care costs as a result of better access to health care (Hughes-Cromwick et al., 2005), and aging in place to avoid or defer the costs of nursing homes (Kaye et al., 2009).

A significant issue for many of these benefits is how to express them in monetary terms.

Current travel training practice is to follow trainees for up to 12 months after their completion of the training course. This practice can significantly understate the benefits of travel training because, at least for some persons, these benefits last for far more than 1 year.

Future research should focus on monetizing as many of these benefits as possible for older travelers and should do so over an extended period of time. The most appropriate time frame should be an important item for research. Some of the benefits that are most amenable to detailed expression might be the following:

- The cost difference to the rider of ADA paratransit service vs. fixed route service.
- Savings to riders from using fixed route public transit instead of other options, like taxis.
- Benefits of increased mobility, such as lowered shopping costs from a wider range of choices and greater health from more accessibility to health care.
- Cost savings from aging in place rather than in nursing homes; nursing home cost avoidance has received a good deal of attention lately so these calculations should not be difficult.

In addition to these benefits to older travelers, benefits to caregivers from not having to provide transportation to older adults should also be calculated. These could include greater employment income due to reduced absenteeism and fewer direct transportation expenses.

It appears that such research will need to involve longitudinal surveys of trainees to document changes over a multi-year time frame.

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## APPENDIX

## List of Information Sources

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*Abbreviations and acronyms used without definitions in TRB publications:*

A4A	Airlines for America
AAAAE	American Association of Airport Executives
AASHO	American Association of State Highway Officials
AASHTO	American Association of State Highway and Transportation Officials
ACI-NA	Airports Council International-North America
ACRP	Airport Cooperative Research Program
ADA	Americans with Disabilities Act
APTA	American Public Transportation Association
ASCE	American Society of Civil Engineers
ASME	American Society of Mechanical Engineers
ASTM	American Society for Testing and Materials
ATA	American Trucking Associations
CTAA	Community Transportation Association of America
CTBSSP	Commercial Truck and Bus Safety Synthesis Program
DHS	Department of Homeland Security
DOE	Department of Energy
EPA	Environmental Protection Agency
FAA	Federal Aviation Administration
FHWA	Federal Highway Administration
FMCSA	Federal Motor Carrier Safety Administration
FRA	Federal Railroad Administration
FTA	Federal Transit Administration
HMCRRP	Hazardous Materials Cooperative Research Program
IEEE	Institute of Electrical and Electronics Engineers
ISTEA	Intermodal Surface Transportation Efficiency Act of 1991
ITE	Institute of Transportation Engineers
MAP-21	Moving Ahead for Progress in the 21st Century Act (2012)
NASA	National Aeronautics and Space Administration
NASAO	National Association of State Aviation Officials
NCFRP	National Cooperative Freight Research Program
NCHRP	National Cooperative Highway Research Program
NHTSA	National Highway Traffic Safety Administration
NTSB	National Transportation Safety Board
PHMSA	Pipeline and Hazardous Materials Safety Administration
RITA	Research and Innovative Technology Administration
SAE	Society of Automotive Engineers
SAFETEA-LU	Safe, Accountable, Flexible, Efficient Transportation Equity Act: A Legacy for Users (2005)
TCRP	Transit Cooperative Research Program
TEA-21	Transportation Equity Act for the 21st Century (1998)
TRB	Transportation Research Board
TSA	Transportation Security Administration
U.S.DOT	United States Department of Transportation