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Travel Training for Older Adults Part I: A Handbook

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TCRP REPORT 168

Travel Training for Older Adults
Part I: A Handbook

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Public Transportation • Passenger Transportation • Safety and Human Factors

TRANSPORTATION RESEARCH BOARD

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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.

Research problem statements for TCRP are solicited periodically but may be submitted to TRB by anyone at any time. It is the responsibility of the TOPS Committee to formulate the research program by identifying the highest priority projects. As part of the evaluation, the TOPS Committee defines funding levels and expected products.

Once selected, each project is assigned to an expert panel, appointed by the Transportation Research Board. The panels prepare project statements (requests for proposals), select contractors, and provide technical guidance and counsel throughout the life of the project. The process for developing research problem statements and selecting research agencies has been used by TRB in managing cooperative research programs since 1962. As in other TRB activities, TCRP project panels serve voluntarily without compensation.

Because research cannot have the desired impact if products fail to reach the intended audience, special emphasis is placed on disseminating TCRP results to the intended end users of the research: transit agencies, service providers, and suppliers. TRB provides a series of research reports, syntheses of transit practice, and other supporting material developed by TCRP research. APTA will arrange for workshops, training aids, field visits, and other activities to ensure that results are implemented by urban and rural transit industry practitioners.

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 I

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The **Transportation Research Board** is one of six major divisions of the National Research Council. The mission of the Transportation Research Board is to provide leadership in transportation innovation and progress through research and information exchange, conducted within a setting that is objective, interdisciplinary, and multimodal. The Board's varied activities annually engage about 7,000 engineers, scientists, and other transportation researchers and practitioners from the public and private sectors and academia, all of whom contribute their expertise in the public interest. The program is supported by state transportation departments, federal agencies including the component administrations of the U.S. Department of Transportation, and other organizations and individuals interested in the development of transportation. **www.TRB.org**

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COOPERATIVE RESEARCH PROGRAMS

F O R E W O R D

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.

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.

CONTENTS

Note: Many of the photographs, figures, and tables in this report have been converted from color to grayscale for printing. The electronic version of the report (posted on the Web at www.trb.org) retains the color versions.

CHAPTER 1

How to Use this Handbook

Objectives of this Handbook

Mobility is central to our lives. To work, shop, get medical care, worship, enjoy educational and recreational opportunities, or see friends and relatives, we need transportation. For many of these trips, most of us drive or ride with someone.

For people without regular or reliable use of a car, other travel options are needed to fulfill their travel needs. By educating people about other options, travel training has the potential to maintain or improve the mobility of older adults, people with disabilities, and others who are not able to drive or have someone else drive for them. Travel training can help anyone start using public transportation or use it more effectively. While clearly not "the one answer" for the travel needs of all older persons and all communities, travel training is a potent tool in the arsenal of strategies for improving or maintaining the mobility of older adults.

TCRP Report 168: Travel Training for Older Adults, Part I: A Handbook provides tools for making travel training more effective in meeting the mobility needs of older persons. The Handbook is intended to provide information for transit agencies and human services providers on how to create, implement, sustain, and evaluate travel training programs for older adults who can use fixed route public transit. The Handbook is intended as a resource for professionals who manage and deliver travel training services. The Handbook will be useful to program staff who work with seniors and people with disabilities, provide housing for older people, operate senior centers, and any others who work with older adults and want to support individual independence and mobility through safe and effective use of transportation alternatives.

The Handbook focuses on practical information that will help interested parties understand the following:

- How providing low-cost travel alternatives for senior riders can increase their travel flexibility, independence, choices, and quality of life.

- Which older adults are likely to benefit from travel training.
- What elements of travel training programs are linked to greater success among different groups of older adults.
- How effective methods of outreach and education can build awareness and knowledge of benefits to key target groups.
- How effective travel training can increase public transit ridership.
- What barriers have to be overcome to implement an effective travel training program.

This Handbook is intended to be a critical tool for those communities working to help older adults learn to travel independently in their communities by using public transportation. For some communities, the use of this Handbook, together with new or expanded senior travel training initiatives, should result in greater mobility for seniors and a measurable increase in the use of fixed route public transit services. This increased use of fixed route services should help relieve pressures on the paratransit services offered by the transit agencies.

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 Handbook will help meet those needs by describing the following:

- The fundamentals of travel training programs, including travel training outreach to the community and types of instruction and their component parts and content.
- The benefits of travel training realized in the near future and in the long run.
- Potential challenges to travel training programs, including perceptions or concerns of potential riders and their advocates, funding, and staffing and sustainability.

Information Sources

Information for this Handbook comes from previous and new research; the new research focused on case studies of current travel training programs. Twenty case studies of travel training programs across the United States were selected because available information suggested that they were likely to be able to provide important details on how to create, sustain, and evaluate travel training programs for older adults. Another key factor was their willingness to cooperate with this research effort.

In-depth case study data were collected on site for seven travel training programs deemed to have well-developed, successful programs. Information from 13 other sites was collected without site visits, but with extensive interviews and follow-up activities. A number of these 20 sites are referenced throughout this Handbook; summaries of the travel training programs of the seven sites are provided in this Handbook in Chapter 6. *TCRP Report 168: Travel Training for Older Adults, Part II: Research Report and Case Studies* includes case study reports on all 20 sites, which are identified in Table 1-1.

Roadmap to the Handbook

TCRP Report 168: Travel Training for Older Adults, Part I: A Handbook provides information for designing, operating, and evaluating travel training programs. This information should inspire better management decisions about travel training programs and how they can support local transportation services. A better understanding of advanced practices in travel training also creates a framework for discussions

Table 1-1. Travel training case study sites.

Case Study Sites	Program	Sponsor
In-depth Case Studies		
Boulder, Colorado	Via Mobility Services Travel Training	Via Mobility Services
Chicago, Illinois	RTA Travel Training Program	Regional Transportation Authority
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	Senior Mobility Orientation, Travel Training, and Other Training	The Kennedy Center, Inc.
Other Case Studies		
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	Laketran Travel Training	Laketran
Meridian, Idaho	Valley Regional Transit Travel Trainers	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, DC	WMATA's Travel Training and Outreach	Washington Metropolitan Area Transit Authority

of how to provide better mobility options throughout the community. This can help begin the process of establishing common understandings and measures to enhancing the effectiveness of travel training programs and to increase their benefits.

This Handbook contains information in eight sections: the roadmap and five additional chapters of information, a glossary of technical terms, and a series of appendices. The Handbook is organized as follows:

- Chapter 1: How to use this Handbook.
- Chapter 2: An overview of key issues in travel training.
- Chapter 3: Characteristics of successful programs.
- Chapter 4: "How to" information on a wide variety of travel training topics.
- Chapter 5: Information on how to improve current travel training practices.
- Chapter 6: A brief discussion of the in-depth case studies conducted for this Handbook.
- Glossary of technical terms.
- Appendix A: List of information sources.
- Appendix B: Suggested contents for travel training program forms.

The chapters of this Handbook provide basic information that all persons involved in travel training for seniors should know and apply. The glossary provides standardized definitions of key transportation and training concepts, while the appendices provide detailed information on specific subjects that may or may not be relevant to all programs in all communities. All users are urged to pay close attention to the materials in the chapters and then select information from the appendices that may be relevant to their specific needs.

There are two companion documents to this Handbook:

- ***TCRP Report 168: Travel Training for Older Adults, Part II: Research Report and Case Studies*** provides basic information about travel training programs and the research activities that were used to develop the findings and recommendations in this Handbook.
- ***TCRP Report 168: Travel Training for Older Adults, Executive Summary*** provides an overview of the materials in this Handbook and the Research Report. This 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.

Transportation providers—all organizations that provide community transportation services to consumers—should be considering the most effective ways to maintain and improve

the mobility of people as they age. Increased attention to senior mobility can have significant positive impacts for older adults, transportation providers, and their communities.

Data Limitations

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, evaluation, 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 in this Handbook 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.

Some of the specific problems encountered were the following:

- 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 depended more on the requirements of the funding source than on the content or results of the training.

All of the seven in-depth case study programs offer travel training to older adults as a component of, or outgrowth of,

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travel training for individuals with disabilities, including school-aged students with disabilities near or at the end of high school. Some case study programs reported results for the overall program but not for the portion of the program targeted at older adults. In several cases, older adults constituted a small portion of the overall training program, sometimes less than 10 percent. Far more detailed reports and outcomes were available for one-on-one training versus group training, but some programs did not report one-on-one training separately for older adults.

Despite these issues, a tremendous amount of useful information is now available from these case study sites and other programs interested 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.

CHAPTER 2

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. A simple graphic of this process is shown in Figure 2-1; a more complete logic model is discussed in Chapter 3.

The importance of this promise stems from living in an 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 available 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 tripmaking.
- Reducing travel time and cost, and improving connections.
- Increasing the use of fixed route transit services.
- Saving money for riders and transit agencies by promoting lower cost alternatives to supplement Americans with Disabilities Act (ADA) paratransit services.
- 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 homes, which is the living arrangement preferred by the vast majority 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 by automobile or other modes can include reduced income; declining 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 some of these impediments to independent travel and provide enhanced access to public transportation.

> Travel training can be the bridge that connects older adults with the freedom to travel on their own terms again.
>
> *Mary Handley, Delmarva Community Services, Inc.*

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 recognize fixed route public transit services as more attractive than paratransit services, the growth of paratransit services can be tempered. With a rapidly growing proportion of the U.S. population now classified as older adults (generally taken to mean persons 65 years of age and older), and with significant
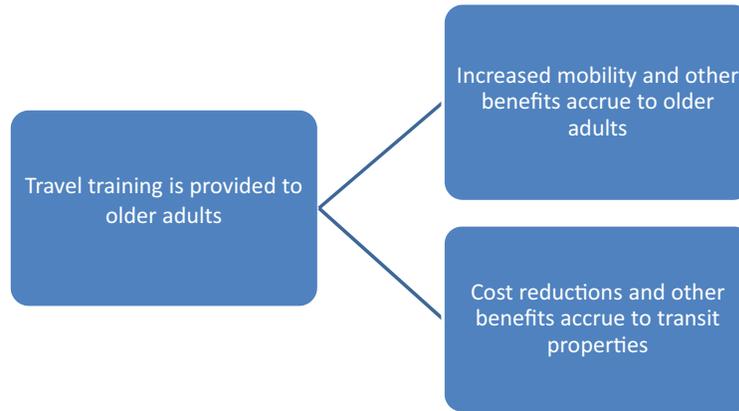
Figure 2-1. Travel training outcomes: a simple version.

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.

This Handbook provides 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.

Key Issues in Travel Training

Travel training programs to enhance the mobility of older adults can address a number of key issues. These issues include the following:

- 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 ADA 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 lack of understanding about which travel training programs are successful and why they are successful:
  - Which programs help increase mobility and why?
  - How can that information be applied to communities of all sizes and features and their various public transportation systems?
- Dissemination of best practices:
  - Certain programs 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 Appendix A, List of Information Sources, for relevant contact information.

Demographic Projections

In the United States, the number of people 65 years of age and older is projected to double between the years 2000 and 2030; projections suggest that there will be about 70 million people 65 years of age and older in 2030 (see Figure 2-2). While older adults of the future may generally be more highly educated, healthier, and more active than their current counterparts, there may also be a greater number of older persons who have mobility or income limitations. Most members of forthcoming older generations will own autos and will have been automobile drivers for most of their lives, including many of their years after age 65. In fact, many older persons 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 likely to be more often 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 older adults currently travel much more often by car than by public transportation, their use of public transit is growing, and older adults are now choosing public transportation for a greater proportion of their trips. As could
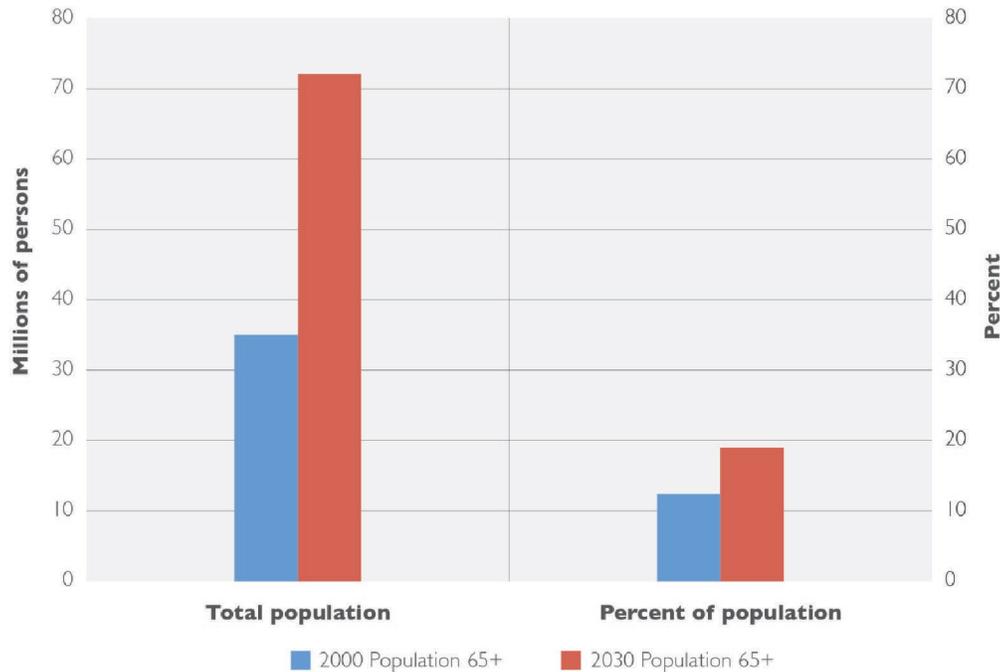
Source: U.S. Census.

Figure 2-2. Growth of the older population.

be expected, older nondrivers use public transportation more than older drivers. Recent surveys also show very low use of other alternative modes, such as taxis and human services transportation, by older persons. 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 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 due to their disability still have some transportation to get to and from their daily tasks. Many public transit agencies are finding it difficult to provide ADA paratransit services in a cost-effective manner to meet the current level of demand; with the projected growth of the older population, meeting paratransit demands may be an even greater challenge in the future.

As public transit agencies search for ways to provide transportation to all customers, **travel training has the potential to save agency costs** by encouraging seniors who experience challenges to independent travel to use fixed route transit or transportation options other than ADA paratransit services 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 Government Accountability Office (GAO), the average number of ADA paratransit trips provided by a transit agency increased 7 percent from 2007 to 2010 and the average cost of providing an ADA paratransit trip increased 10 percent 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

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Transit Agency Concerns about ADA Paratransit Costs

- A typical ADA paratransit trip can cost 3 to 10 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 percent of a transit agency's ridership but can consume more than 5 percent of its total expenses.
- The demand for ADA paratransit trips could increase substantially in the future.

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.

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 authorize surface transportation funding for 2 years: titled "Moving Ahead for Progress for the 21st Century" (MAP-21), this legislation provided a possible $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 haven't matched transportation needs 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 Section 5317 New Freedom program is now included into an expanded Section 5310 program, which is now called Formula Grants for the Enhanced Mobility of Seniors and Individuals with Disabilities. The Section 5317 program has been a common source of funding for travel training programs. The Section 5316 Job Access and Reverse Commute program is now included in the Section 5307 Formula Grant program as an eligible expense with no assurance that any funding will be used for JARC projects. The initial FY 2013 authorization for the expanded Section 5310 program is more than 30 percent less than the combined FY 2012 appropriations for the Section 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.

Travel Training: How It's Supposed to Work

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.

How Changes Can Occur— An Overall Perspective

Figure 2-3 illustrates 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 2-3 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 constructively 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 result 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 2-3 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.

A Travel Training Logic Model

While Figure 2-3 provides a theory of change, Figure 2-4 presents a more specific travel training logic model for these changes that traces the connections between inputs, activities,

Consumers

Outreach to Partners and Consumers

Senior Travel Training

Orientations and Presentations	Group Travel Training	One-on-One Senior Travel Training

Better Understanding of Transit Services	Changes in Travel Behavior	Improved Travel Options	Improved Quality of Life for Older Adults

Better Understanding of Travel Needs of Older Adults	Changes in Services Offered	Improved Financial Conditions for Transit	Improved Transportation Services and Options

Transportation Providers

Figure 2-3. Travel training for older adults theory of change.

INPUTS

RESOURCES
- Funding
- Staff
- Volunteers
- Facilities

OUTSIDE SUPPORTS
- Partnerships
- Community Support

MISSION, GUIDELINES, STANDARDS
- Clear Mission Statement
- Industry Standards

Implementation Affected by:

- Transit coverage and service span (infrastructure)
- Weather (seasonal issues affecting use)
- Terrain
- Local approaches to cooperation with other programs and across jurisdictions
- Local support for public transit and funding
- External factors such as the economy, unemployment, public funding, and political support.
- Physical and mental abilities and willingness to participate in training
- Family support

ACTIVITIES

Collect data and analyze needs

Identify partners, determine outreach approach

Design training program and components

Create or obtain training materials

Hire staff, identify volunteers

Train staff and volunteers

Conduct orientations and trainings

Monitor, evaluate, and report results, modify as needed

OUTPUTS

- # of presentations/orientations
- # of training sessions
- # of people receiving orientations
- # of people trained in groups
- # of people trained 1 on 1

Outcomes: Short-term Changes

- Better understanding of transit services
- Enhanced travel skills

- Enhanced personal development for older adults
- Increased social connections

Better understanding of needs of older adults

Improved training program

Results: Longer-term Changes

Using all travel modes

Greater use of fixed route transit

Less (but appropriate) use of ADA paratransit

Greater use of other travel options

Reduced travel time and cost

Increased flexibility and transit options for older adults

System Changes

- More aging in place
- Fewer nursing home placements
- Improved quality of life
- Reduced caregiver burden

Cost savings and increased income for public transit

More financial stability

Improved quality of transit services
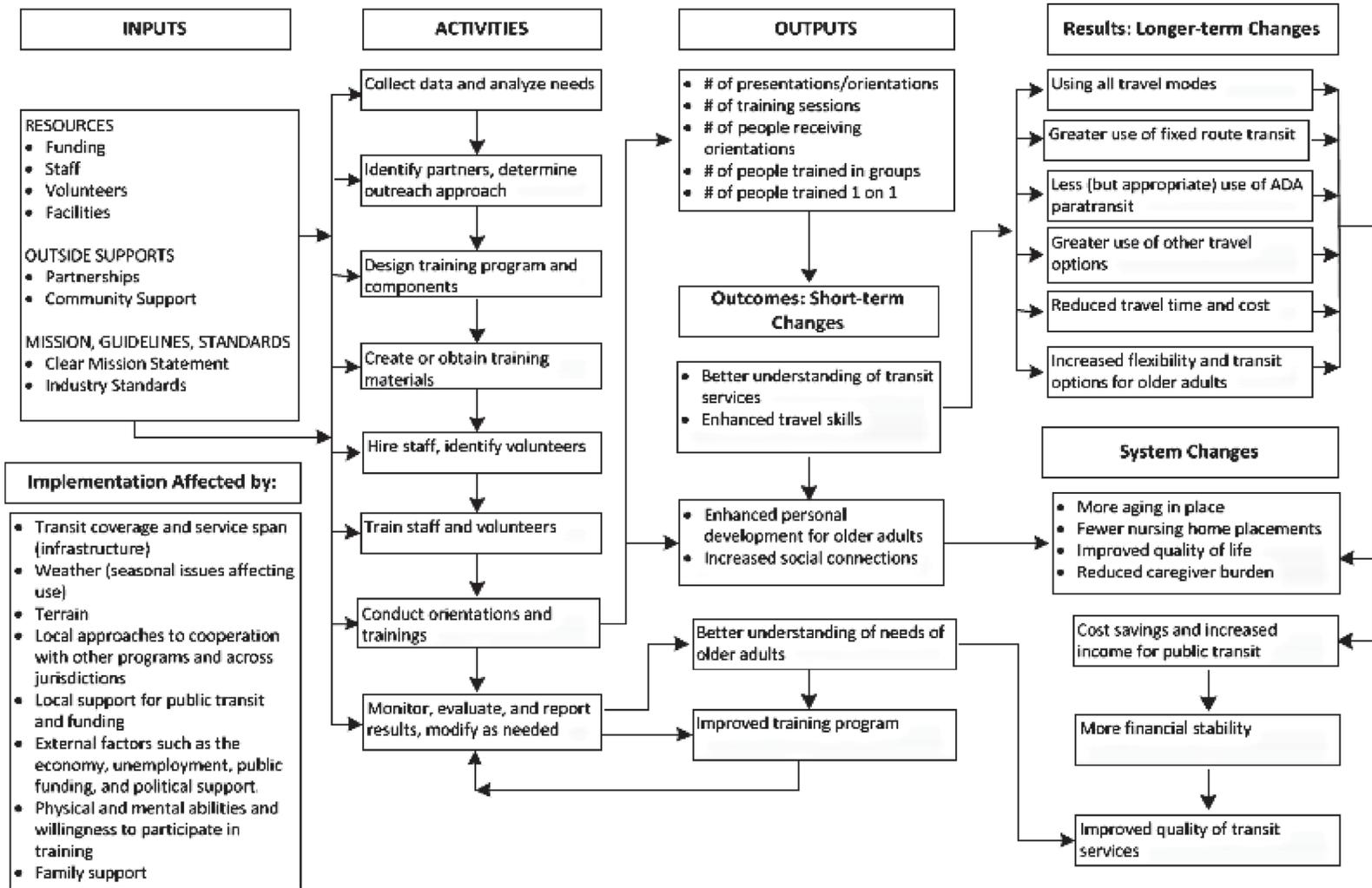
Figure 2-4. Travel training for older adults logic model.

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 2-4. **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 is 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 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.

Fundamentals of Travel Training Programs

Each community is unique, with its own profile of older adult mobility needs and preferences, past history of efforts to promote such mobility, political climate, institutional arrangements, resource constraints, public transit coverage and availability, and other important features. Thus, travel training programs will need to be responsive to the charac-

Table 2-1. Fundamentals of travel training programs.

1. Program Focus and Orientation
2. Program Design, Development, and Operations
3. Program Instruction, Content, and Staff
4. Partnerships
5. Program Outreach and Promotion
6. Program Monitoring and Analysis

teristics of the communities in which they are established. At the same time, there are common themes and principles that underlie effective travel training programs, and each community will need to shape these principles in light of its own needs and resources as it undertakes efforts to build and sustain successful travel training. Table 2-1 and this section discuss many of these principles or fundamentals of travel training programs.

Program Focus and Orientation

The philosophy, vision, and mission of 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 program 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, independent, and able to age in place if that is their desire.

It must be remembered that the typical result of transit agencies saving money on paratransit services through investments in travel training is a strong motivator for such investments. Additional farebox revenues will accrue to public transit systems from older adults who never previously used paratransit service but now ride fixed route service. In the more and more competitive environment for scarce public dollars, travel training programs often need to demonstrate both cost savings and revenue increases to maintain viable funding streams.

Program Design, Development, and Operations

Program design and development deserve careful consideration as they are the basis for many program decisions. Design and development should be responsive to stakeholder needs (both users and providers) and reflect community transportation resources. In addition and to the extent possible, programs should offer individual assessments, as well as both group and one-on-one training. Individual assessments of program participants' needs and capabilities serve as a useful prescreening tool to help customize the actual training.

One-on-one training provides individualized instruction on how to travel safely and independently, including hands-on experience riding public transit. Group training provides an opportunity to orient a larger audience to the basics of public transit including how to plan and take trips. Group training can be successfully targeted to high-volume residential/work locations. By striving for this type of multifaceted and comprehensive program orientation, travel training can be better tailored to the individual needs and capabilities of the target audience(s) for the program.

While there are many older adults who do not need individualized training to fulfill their travel needs, the most successful training programs offer 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, and proximity to transit, as well as his or her wishes and transportation goals. An appointment with the customer in his or her own home for an initial interview is a very important means of starting a training program because of the insights it typically offers.

In terms of program operations, sustainable funding is a key. Travel training information can be integrated into agency marketing and branding efforts. The training program can be marketed through educational outreach. Written forms and procedures need to be developed as a basis for program reporting and evaluation.

Program Instruction, Content, and Staff

Program instruction and content will vary depending on the scope of the program, resources available, needs of the target audience, particular strengths of the program staff, and so forth. Having clearly written training materials is quite important as is providing opportunities for "hands-on" experience like riding actual transit routes. Support for the travel trainers must include quality training, ongoing support, and an evaluation process of their activities.

The travel trainers are even more important. It is clear from observing successful travel training programs that competent staff members who excel in customer service are key to program success. Many times a social services or human services background can prove very valuable. Despite what some people might expect, the personal qualities of trainers are often more important than job experience or background. Many 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 trainees by being sensitive to feelings: if people are losing some of their independence, it's important that they can still keep their dignity. Personal traits of trainers such as empathy, likability, respect, patience, adaptability, and kindness are central to this ability. Trainer credibility can also be enhanced when the trainer regularly uses public transportation. Critical thinking is important to trainer effectiveness and having established relationships with key personnel and agencies in the transportation community is a bonus. Finally, trainers must be flexible, resilient, and calm, as they often encounter unexpected changes in the real-world training environment.

> Being a successful travel trainer takes heart, compassion.
>
> *Virginia Werly, Riverside Transit Authority*

Partnerships

Successful travel training programs rely on partnerships to support their travel training activities. If the travel training program is offered by the local public transit operator, partnerships with human services agencies are vital. If an organization other than the transit agency provides travel training, the transit agency is a key partner: it can be a primary funding source and also a provider of referrals to people 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 (e.g., travel to doctor's offices or medical facilities that are not near fixed routes) and fixed route transit for others.

Human and social services agencies that provide services to older adults or 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 are key partners, particularly for group travel training, especially those that are subsidized by the U.S. Department of Housing and Urban Development. Hospitals can be key partners at some sites.

The person leading the travel training program plays a central role in building and sustaining relationships with key organizational stakeholders in the community, as well as working directly with program participants. Thus, a dynamic leader with strong interpersonal skills, a passion for this kind of work, and expertise in important areas related to the populations served can make an important contribution to the success of the program.

Program Outreach and Promotion

The experience of successful travel training programs makes it clear that promotion and outreach are needed to identify and raise the interest of target audiences. Referrals from transit agencies, senior centers, senior housing projects, and

other human and social services agencies are often the result of regular and repeated outreach efforts to familiarize agencies with travel training in general and the services of the case study programs in particular. The focus of many programs in marketing travel training for older adults is to promote the lower cost and relative flexibility of fixed route programs as an alternative to ADA paratransit, allowing seniors the flexibility to travel without having to reserve ADA paratransit service ahead of time. Marketing can also increase knowledge of the travel options available to seniors. Many travel training programs publish books or brochures with "success stories" about clients who successfully participated in travel training and, as a result, were able to experience a richer, fuller life. Word of mouth referrals from prior trainees can be a highly effective marketing tool.

Many existing travel training 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. Sometimes these programs are called "train the trainer" programs because staff in the human, social services, and transit agencies may provide support to senior adults both before and after they receive travel training. The reality is that programs that provide orientation to the benefits of fixed route service and travel training provide a resource for promoting programs to individuals who are in a position to positively influence the travel training target populations.

Program Monitoring and Analysis

Demonstrating program results is critical to the success of any publicly funded program. People and agencies who fund programs, who manage and operate programs, and who benefit from services have an interest in knowing if a program is successful, why it is successful, and how it could be further improved. Performance measurement is a tool typically involved in improving transportation services and other programs by documenting progress toward pre-established goals, such as increasing the number of older adults using fixed route transit services.

It's important for travel training programs to keep track of the resources they apply to their program (**inputs**), what they produced with those resources (**outputs**), and what happened as a result (**outcomes** or changed conditions), and **impacts**, which are the direct or indirect results or consequences from achieving program goals. (See the logic model linking these changes presented in Figure 2-4.) New technologies can greatly assist in recording and reporting tasks.

What this means for travel training programs is that they need to keep track of their expenses and other resources invested in the program, record the numbers of persons trained, and monitor how their training has affected their trainees in the short term and in the long run. This informa-

tion will help the programs improve operations to better meet goals, make the programs more cost effective over time, and demonstrate their successes to funders and other key community stakeholders.

Benefits of Travel Training

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, local transportation services, those who provide care for older adults, and communities. Some of the benefits are immediate and some are long term. Full details of studies describing the benefits of travel training are provided in *TCRP Report 168: Travel Training for Older Adults*, *Part II: Research Report and Case Studies.*

Benefits for Older Travelers

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

- Expand their travel options.
- Increase their tripmaking, 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 aging in place in their own homes or traveling spontaneously, according to individual needs or desires.
- Enhance personal development, reduce anxiety, and 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 mobility supports aging in place, which can help to avoid or defer the costs of nursing homes.

Staff members of several travel training programs see travel training as life affirming. Travel training can change the entire demeanor of trainees by expanding their options for getting around, thereby increasing their independence, spontaneity, and quality of life. Travel training has been reported by Ride Connection staff to be valuable because "you can see how the independence to get around changes the trainees'

personalities for the better." Based on follow-up studies of trainees, many travel training graduates continue to travel by fixed route buses and trains years after graduation.

The benefits of travel training programs are reported by those programs in a large variety of ways. Benefits for persons trained included the following:

- Via Mobility Services in Boulder, Colorado, reported that one-third of participants surveyed in 2012 reported having used public transit since they completed their training. Of those, 46 percent reported they get out more than they did prior to training, 60 percent reported that they are less dependent on family and friends for rides, and 26 percent reported less dependence on paratransit. A total of 67 percent of all respondents reported more choices of places they could go, and 80 percent reported greater flexibility with their times of travel.
- In New Jersey, NJTIP reported an increase of more than 400 percent in the number of trips taken by travel training program graduates (more than 80 percent of whom were persons with disabilities, not seniors). Seventy-five percent of graduates continued to use fixed route buses and trains in the year after graduation, and they used regular bus and train services three times more often than they used ADA paratransit services.
- Portland, Oregon's RideWise program reported that individuals who completed the entire one-on-one training process became successful independent travelers 93 percent of the time. RideWise staff members describe travel training as "a game changer"—changing people from shut-ins to community members.
- In Sacramento, California, follow-up interviews conducted with Paratransit, Inc. program participants approximately 3 to 6 months after completion of the training have historically shown that between 80 percent and 92 percent continue to successfully use the fixed route system at that point in time.

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 beneficial 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 taken.

- 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.

Here are a few of the reported benefits to transit providers:

- A 2011 study conducted for NJTIP concluded that NJTIP increased NJ TRANSIT's fare box revenue and resulted in savings in Access Link costs for a total of $234,000 annually. NJTIP thus covered its expenses and had a positive return of 17 percent.
- In Portland, Ride Connection reports calculations for its RideWise program as a 3 to 1 ratio of benefits to costs over a 1-year period. (This estimate only includes the benefits over the first year that a trainee is using transit, which means that actual benefits could be substantially greater.)
- In Sacramento, Paratransit, Inc. reported that, for individuals who used ADA paratransit services to travel to work, each person trained saved the transit agency an average of $7,000 per year. The actual savings for older adults is likely to be less since many older adults do not travel 5 days a week to work.
- Spokane (Washington) 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.
- In Washington, D.C., a special report on Metro's travel training program estimated possible savings of $1.5 million in FY 2011–12 from the travel training program for persons with disabilities and older adults.

Benefits to Caregivers

Recent studies have found that more than 90 percent of unpaid, informal caregivers for older adults provide some

form of transportation assistance, usually by driving the older adults to destinations. Informal caregiving has been linked to poorer health and economic hardship among caregivers. Travel training has the potential to ease caregivers' burden throughout their support network by allowing at least some of these trips to be made by bus or rail, freeing up informal caregivers for other activities and at the same time saving resources that would otherwise be spent on caring for an older adult.

Benefits for the Community

In the most general sense, travel training programs can be an essential component for 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. Travel training can help meet these mobility needs among older adults, which in turn helps the entire community.

Potential Challenges to Travel Training Programs

There will be challenges that any agency will face when developing a travel training program. Key among them are the following: funding, outreach, collaboration, effective communication of program benefits, evaluation, and infrastructure. Each of these challenges is discussed more fully below.

Funding

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. Travel training programs must understand how to create a scalable program that can adjust to the economy. Tracking the cost savings of travel training is important to understand how much money a program is saving the community so that arguments can be made for more funding support (for more information, see the section titled "What's Needed to Account for Your Expenses?"). Relationships with community partners are critical to the success of travel training programs because of the opportunity they afford to leverage scarce resources as well as continue to bring people in need into the program.

Outreach

Ongoing outreach is critical because bringing older adults into the program can be challenging for a number of reasons, including the frequently negative media culture surrounding the use of public transit, the stigma associated with asking for assistance, and the limitations in funding and staffing that constrain the amount of outreach that is needed. Travel trainers are concerned that public transportation often receives negative publicity from local media. For example, transit safety may sometimes be reported as a much greater problem than it actually is. This negative reporting can restrict interest in using public transit, which can diminish participation in travel training programs. 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. Older persons who need transportation are not necessarily associated with senior centers. Targeting program efforts to groups or organizations is economically feasible but may miss many individuals who could benefit from the services.

Collaboration

Collaboration is essential to developing a successful travel training program. It takes time and resources to establish and nurture relationships with senior centers and senior agencies that work with seniors. Another challenge in establishing a successful travel training program is the coordination across political jurisdictions and transit agencies, particularly in terms of scheduling, route connections, and fare media. Creating a collaborative working relationship with the transit agencies and with the senior living communities and the agencies that work with seniors will help the community in the long run.

Examples of productive collaboration arrangements include partnerships with the following:

- Public transit agencies:
  - Via Mobility Services and Denver's Regional Transportation District (RTD).
  - NJTIP and NJ TRANSIT.
  - Ride Connection (Portland, Oregon) and TriMet.
  - Paratransit, Inc. and the Sacramento Regional Transit District.
- Planning agencies or districts:
  - Denver Regional Mobility and Access Council (DRMAC) and Via Mobility Services.
  - The Sacramento Area Council of Government (SACOG) and the launching of travel training efforts in Sacramento.
- Senior centers and other human services agencies:
  - The Regional Transportation Authority (RTA) in Chicago, Illinois, partners with the Chicago Transit Authority (CTA), Metra, and Pace. They also contract with the Lighthouse for the Blind, three Centers for Independent Living, and a Community Action Agency. The RTA also has contacts with more than 500 social services and human services organizations.

– Ride Connection (Portland, Oregon) 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.

– Key program partners for Riverside, California's Freedom to Go program are county agencies such as the Department of Rehabilitation, Department of Education, Inland Regional Center, senior centers, and adult day programs.

To help overcome some of the challenges in establishing collaborative relationships, programs need to be flexible so that they take advantage of opportunities that arise in the community and remain responsive to the changing needs of the populations they serve. These relationships are the necessary starting point for trust, something that is central to program success.

Effective Communication of Program Benefits

The competition for public dollars requires that program benefits be communicated to public officials. This can be in the form of short reports showing results, but often is most effective with success stories. The sustainability of the program depends on adequate funding, and funding comes from success. Once the benefits are determined, then they must be communicated in an effective manner. This can be through the use of charts, tables, and oral presentations. Again, stories are a powerful tool.

Evaluation

In order for a program to be successful, evaluation criteria must be established. While collection of data is a time consuming and sometimes difficult task, in order to determine the benefits of a program, data must be available to evaluate progress. The evaluation should include financial, utilization, and "quality of life" information.

Infrastructure

Problems with the infrastructure of the public transit system in the community (e.g., having buses available, having bus stops that are accessible, having sufficient seating space for seniors) may limit who can benefit from the travel training. 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. Thus, an individual may successfully learn to navigate the bus ride itself, but because of mobility limitations, may not be able to overcome barriers associated with getting to the bus stop and/or finding a sheltered place to wait for the bus. Even in the absence of such limitations, features of the natural and built environment (e.g., hills, broken sidewalks, and streets without connections) can pose problems in accessing transit stops. In addition, some destinations are not well served by public transportation, especially in suburban areas, thus restricting older adults' opportunities to get to where they want to go using public transit.

Other Challenges

There are other challenges that travel training programs may face. For example, in cold weather climates, programs may be limited in their ability to conduct training during the wintertime. In addition, staff turnover may make it difficult to maintain stability in programming, or to preserve established relationships in the community.

Some travel training programs expressed concerns about liability issues: due to liability considerations, one program does not allow its volunteer Mobility Ambassadors to meet customers in their homes; the Ambassador and the customer agree upon a public location instead. Other programs have found in-home interviews to be rich in information about potential trainees. These programs typically inform trainees of the nature and purpose of training, risks involved, the timeframe and extent of instruction, and the trainee's right to refuse or withdraw consent. The trainee is required to sign an informed consent. Trainees are also asked to commit to the training process. Ride Connection has found that making use of a multi-purpose form that serves as a training consent, release of liability, and release of information authorization is beneficial. The Kennedy Center has separate forms for these agreements. A proactive risk management approach is often an effective way to deal with liability concerns: one way to mitigate risk and liability is to provide high quality service. Important information about liability is available from Easter Seals Project ACTION (see Appendix A, Part 3).

CHAPTER 3

Characteristics of Successful Travel Training Programs

The Attributes of Successful Programs

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, which all means that their mobility has improved.
- Success means that the travel training programs are targeting and graduating at least some persons who might otherwise be expected to face significant mobility problems (for example, gradually losing their ability to drive and then losing their ability to access their key destinations).
- 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 compared to the benefits received.
- Success means that the program keeps accurate records of costs, activities, and results to better meet goals and manage the program, 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.

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.
- Creating standards for training and supporting travel trainers.
- 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 and widely disseminating success stories.
- 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

Most travel trainers emphasized that the purpose of the training is to increase the number of travel options available to

people, not just 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 in which they were undertaken. Mobility training benefits transit providers since it encourages the use of fixed route service, the most appropriate and cost-effective transit options available.

In Portland, Oregon, 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 the focus on "building trust in the most respectful way," both with their travel training customers and with 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 its practice of mobility management, and this includes attention to the feelings of its customers, which may include concepts of dignity and fears of losing independence. It is vital to understand each person, and his or her unique skill sets, other resources, and travel needs. There is no typical training experience; the Ride Connection program is highly flexible and tailored to specific individuals.

Creating Standards for Training and Supporting Travel Trainers

Proficiency standards for staff members who are providing travel training are needed to ensure that travel training programs are effective and successful in training older persons to travel safely, independently and confidently on public transportation systems. To train seniors successfully, travel trainers must be confident in their travel training skills and their ability to be responsive to the capabilities of individual seniors they are training. The content and curricula of a program should be based on proven methods developed by training professionals; responsive to the needs, capabilities, and limitations of older persons; and connected to the public transit system that seniors would be riding. Some of this information is currently provided by Easter Seals Project ACTION in its *Competencies for the Practice of Travel Instruction and Travel Training*. See Appendix A, Part 3 for more information. In addition, travel training programs should ensure that they offer ongoing training and support services to their travel trainers so that the trainers are up to date on the latest training practices and feel that they are being supported in the sometimes difficult job of working with individual needs and personalities.

Tailoring Travel Training to Individual Needs

Many older adults do not need intensive assistance to expand their travel options. While some may not need individualized training to fulfill their travel needs, most successful training programs provide highly tailored one-on-one training when appropriate. 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, and proximity to transit, as well as his or her wishes and transportation goals. Conducting an appointment with customers in their 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 having the travel trainer scout preferred walking and riding travel routes and establish an individualized training plan that may vary in length and intensity depending upon the individual's response to the training program.

> It's important to understand each person, who they are. Everyone is so different; this allows us to be creative.
>
> *Lisa Sempert and Devon Driscoll,*
> *Ride Connection*

For example, Via Mobility's one-on-one training in Boulder, Colorado, 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 trainees. In California, 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.

A number of older adults are more comfortable in training and travel situations when accompanied by friends, family members, or peers. Accommodations for this kind of support should be available when necessary. In Via Mobility's program in Boulder, volunteers are used as bus buddies to accompany riders and provide them with information and encouragement to build their skills and confidence.

Tailoring Travel Training to Your Local Community

It is extremely important to tailor travel training efforts to the persons and resources in your local community.

Understanding the local culture of senior citizens (a highlight of the Cambridge, Maryland, program) 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 (for example, in Chicago, Portland, Riverside, and Sacramento) 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.

Key attributes of travel trainers are said to be as follows:

- Enjoying working with people and being able to connect with participants.
- Having personal traits such as empathy, likability, respect, patience, and kindness.
- Using transit on a regular basis (this enhances their credibility) and having established relationships in the transportation community.
- Possessing flexibility, resilience, and calmness to deal with unexpected changes often encountered 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 important areas related 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.

Whether travel training is provided by a public transit agency or another organization depends highly on local conditions and capabilities. The case studies included successful examples of transit and non-transit leadership. Some transit agencies strongly value having the training program under their direct control; other transit agencies feel that all parties benefit from separating travel training and transit services because outside organizations have a greater flexibility in what they can do. This can specifically apply to the ability to use volunteer labor as part of the travel training program.

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 (for example, TriMet in Portland) that are not only a primary funding source, but also provide referrals to clients who could benefit from travel training. Human and social services agencies can provide referrals and develop travel training programs to assist their consumers. Senior centers, senior housing complexes, and hospitals can be key partners, particularly for group travel training. 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.

Programs need to be flexible so that they take advantage of opportunities that arise in the community and be 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 system, 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 New Jersey, 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. 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. NJTIP's 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.

In Portland, Ride Connection has extremely strong support from TriMet, the local public transit system. Ride Connection started the RideWise program in 2004 as a result of needs identified by TriMet's internal review process. 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 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. They have created relationships with senior communities, senior programs, and with senior centers in the Sacramento, California, area. The travel training program typically visits the senior complexes once a year to promote travel training. Paratransit, Inc. will return to a senior complex if requested based on turnover of the complex; if they are not asked, they will ask to come back in a year.

One of the reasons that The Kennedy Center in Connecticut (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 the state as well as the larger urban transit districts throughout Connecticut. Its methods have been effective in training individuals, as recognized by feedback from participants to referring agencies and TKC, and as demonstrated by TKC's 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, Inc., 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, including an increased sense of purpose in their lives. 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 and Widely Disseminating Success Stories

Evaluating travel training outcomes clearly requires detailed data records of costs and benefits. Information currently available focuses on the benefits of one-on-one training; the benefits of other training modes should also be documented.

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 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 a year. Average cost savings for seniors are likely to be lower than this because older adults are not as frequently traveling to work or other 5-day per week destinations. The cost avoidance over the last 17 years in Sacramento for all trainees has been calculated to be more than $20 million.

Ride Connection's estimate of a 3 to 1 ratio of benefits to costs from its RideWise program is a conservative estimate of benefits for many reasons, one of them being that it is not calculating the long-term benefits of travel training, only the benefits over the first year that a trainee is using transit. Also, this estimate does not include benefits from the program's Riders' Club component. RideWise has demonstrated to TriMet, the local transit provider, that the productivity improvement attributable to its program has saved money for TriMet and has slowed the growth of TriMet's ADA paratransit services.

At the same time, RideWise believes that one "cannot measure program success solely by ADA cost avoidance." RideWise staff see travel training as life affirming. 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.

Based on follow-up calls, 75 percent of New Jersey's NJTIP program graduates continued to travel by fixed route buses and trains in the year after graduation. Their graduates used regular bus and train routes three times more often than they used paratransit. In New Jersey, there was an increase of 400 percent in per capita transit trips after graduation from the program. In Sacramento, between 80 percent and 92 percent of travel training graduates continue to rely on fixed route service within 3 months after successful completion of the training.

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.

Realizing the Benefits of Technology

The Riverside Transit Agency (RTA) in 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 people who have received travel training. This enables RTA to use farebox recording 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 travel training in a group session and selects one senior from a group to be the 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 one month.

RTA uses its farebox recording 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.

The Spokane [Washington] Transit Authority (STA) also uses Smart Card technology, developed by Innovative Paradigms, a division of Paratransit, Inc., to track the use of public transit by mobility training graduates. STA has used this technology to record ADA paratransit trips avoided or deferred and to calculate the annual cost avoidance realized from their mobility training program. Innovative Paradigms has developed proprietary software that can be integrated with in-person eligibility programs and can monitor outreach, group, basic, and intensive training activities. Program reports can also be generated.

Identifying and Retaining Funding and Other Resources

Most programs are dependent on a few but highly focused funding sources, including the Federal Transit Administration (FTA), state departments of transportation (DOTs), state transit agencies, or local government agencies. Many programs have depended on funding from FTA's Section 5317 New Freedom formula grant program which is intended to, according to FTA, "provide additional tools to overcome existing barriers facing Americans with disabilities seeking integration into the work force and full participation in society." When New Freedom funds are involved, this has meant that travel training for older adults has been provided in conjunction with travel training services provided to persons with disabilities.

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 their reported expenses. Programs that involved large numbers of trainees and 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 (Via Mobility, Boulder, Colorado) to $855,000 (the Regional Transportation Authority, Chicago, Illinois, which reported the largest number of trainees of the cases studied). Note that, because accounting and reporting procedures differed from site to site, the expenses and their results reported by the case studies may not be strictly comparable. See the section titled "Data Limitations" in Chapter 1 for more information.

Via Mobility Services provides travel training services with funding from Boulder County, the City of Boulder, the DRMAC, the RTD, the United Way, and the Rose Foundation. Many of these latter sources provide funding to the overall Via Mobility Services, which then allocates them among its many programs.

Revenues for Paratransit's Mobility Training 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 Reverses Commute (JARC) grant, and from the South Area Transportation Management Association (TMA). Also, Paratransit, Inc., 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.

Via Mobility and Ride Connection make substantial use of volunteers. Ride Connection's RideWise travel training program 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.

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 success, 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; considering how travel training can succeed in light of local transportation resources, local conditions, and individual needs and abilities; 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.

- The RTA in Chicago 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 the program easier for them.

- The NJTIP 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 its 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, and his or her skill sets, other resources, and 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. As noted earlier, RideWise has demonstrated to TriMet that its travel training program 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 staff believe that one of the reasons they have 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. 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.

C H A P T E R   4

"How to" Information

This chapter provides answers to some fundamental and frequently asked questions about travel training. These questions should be useful to most travel training programs whether they are just starting or have been under way for some time:

- Why get involved with travel training?
- What travel skills will you teach?
- What is an effective travel training program?
- How do you set up an effective travel training program in your community?
- What are the resources needed for an effective and sustainable travel training program?
- How do you get those resources?
- How can you establish and implement programs to train and support travel trainers?
- What's needed to account for your expenses?
- How do you measure the benefits of travel training?
- How do you set up an effective outreach, education, and marketing program?
- What tools and techniques are useful?
- What are some obstacles that your travel training program might encounter? How can you deal with them?
- How can you integrate travel training with mobility management efforts?

Why Get Involved with Travel Training?

The short answer is because travel training for older adults creates many benefits for individuals and organizations, and these benefits are significantly greater than the costs. In fact, as previously mentioned, the list of benefits is long and extensive. Individual travelers can realize increased mobility and independence and less social isolation, and public transportation providers can expect financial benefits.

The numerous benefits travel training provides for individual travelers include the following:

- Increased tripmaking, short term and long term, leading to enhanced mobility.
- Improved travel attributes, such as greater flexibility with times of travel, no need to make advance reservations, and less dependence on family and friends for rides.
- Quality of life improvements, such as aging in place, getting out more often, and freedom to travel spontaneously, according to individual needs or desires.
- Personal development, such as increased confidence in travel abilities and more control over one's own activities and schedule.
- Economic benefits like lower cost for riders and avoiding the costs of nursing homes.

The benefits to the transit providers can be quite substantial:

- There can be substantial cost savings to the transit agency if travel training can encourage paratransit riders to use fixed route services instead of the paratransit services.
- 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).
- A travel training program can also result in more space on paratransit vehicles for riders who have no other transit options.

Benefits like these are likely to have even more relevance in the future. As discussed in Chapter 2, the number of older adults (age 65 and older) is expected to grow from about 40 million in 2011 (13 percent of the population) to about 87 million in 2050 (about 21 percent of the population). This growth will be even more dramatic for people age 85 and older.

The growth of the older population is likely to increase the numbers of people who have some difficulty in providing

their own transportation. Certain age-related health conditions can make safe driving more difficult. 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. Training older people to use transit services has the potential to help older adults who cannot or choose not to drive maintain mobility and quality of life.

What Travel Skills Will You Try to Promote?

There are numerous skills that an individual needs to successfully travel using public transportation. The following lists include some necessary individual characteristics; if an individual does not have these skills before travel training begins, he/she should certainly have them by the end of training. A successful trainee should be able to demonstrate competence in at least these areas at the end of the training process:

- Crosses streets safely.
- Identifies and boards the correct vehicle in his or her chosen mode of transportation
- Problem-solves:
  – Demonstrates decision-making skills.
  – Handles unexpected situations or problems.
- Follows directions.
- Independently initiates action.
- Maintains appropriate behavior:
  – Interacts appropriately with strangers.
- Recognizes and avoids dangerous situations and obstacles.
- Handles unexpected situations or problems.
- Asks for assistance and requests help from appropriate sources.

A successful travel training program for older adults should teach the participant how to plan a trip and use public transportation.

- Plan a trip:
  – Identify transportation options.
  – Understand route maps, stops, schedules, and landmarks.
- Use public transportation:
  – Get to and from bus stops safely.
  – Buy and use fare media.
  – Get on and off the bus safely.
  – Pay fares and purchase passes.
  – Ride a specific route.
  – If necessary, ask for help from the driver or other passengers.
  – Transfer to other buses.

What Makes an Effective Travel Training Program?

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. A budget and a program for tracking expenses incurred.
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 Focused on Customer Service First

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. So, take time at the beginning or when re-assessing a program to develop a vision for the program and determine how the mission will fulfill the vision.

Individual Abilities and Learning Patterns

Effective travel training has a strong individual focus, meaning that training programs should be closely tailored to the needs and abilities of those people being trained. The Kennedy Center created a list of the 15 keys to effective travel training:

1. Always keep safety as the foremost concern.
2. Be sensitive to learning needs, styles, and patterns.
3. Involve the consumer in his or her own travel training program.
4. Structure the lesson plan sequence so that each succeeding task is built on previous successes.
5. Keep the training steps short and simple.

6. Check to see that the trainee has understood the explanations by asking for restatement or demonstration.
7. Take cues from the trainee as to the speed and conditions of training.
8. Use the natural helping network to reinforce skill attainment and provide encouragement.
9. Turn what may be negative occurrences in public transit travel into positive travel training learning experiences.
10. Make proper use of psychological motivators to travel independently.
11. Communicate a positive acceptance of the consumer, regardless of success or failure during the travel training lessons.
12. Foster independence, but remain an advocate.
13. Be patient.
14. Keep a sense of humor.
15. Make the learning process fun.

Professional, Well-Trained Staff

The travel training program should be staffed with professionals who understand a social services model of program delivery and 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. The travel training program should provide regular learning updates and performance evaluations.

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. While group training may be sufficient for some people, other older adults will require individualized training, tailored to their capabilities, experience, environment, and the trip destinations they need to reach. Some travel trainees may require periodic retraining. Such training is essential for older adults to continue to benefit from the use of fixed route or paratransit service, as services or senior capabilities may change. Many of the travel training programs reviewed for this study have travel training curricula available.

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. Whether inside or outside a 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 that 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.

Planning for and Tracking Expenses

The most effective programs do the following:

- Plan for the coming year's expenses.
- Record all expenses related to travel training.
- Record the immediate results of their training efforts:
  - Numbers of training sessions held and persons trained should be recorded.
  - Results should be tracked separately by mode of training (orientation, group training, and one-on-one training).
- Record and report the long-term results of travel training efforts, such as changes (if any) for older adults in these areas:
  - Numbers of trips taken.
  - Patterns of use of fixed route transit and ADA paratransit services.
  - Travel costs.
  - Satisfaction with travel services.
  - Social connectedness.
- Record and report the long-term results of their training efforts, such as changes (if any) for each travel mode for transportation providers:
  - Overall numbers of trips taken.
  - Overall costs.
  - Rates of growth in expenses.

These topics are discussed in detail in subsequent sections.

Tracking the Results of Travel Training Completed with Older Adults

Measuring results is important for a number of reasons, including documenting the benefits that older adults achieve. 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. In addition, program results should report the costs of providing travel training services and the resulting transportation costs that are saved as a result of increased use of fixed route transit services by older adults.

Individual and Program Outcome Measures

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 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 sustained funding for the travel training program, and documentation of savings will help to obtain this funding. Detailed documentation of program results will be vital to obtaining continuing funding.

Stable and Sustainable Funding

Sustainable funding is critical to support a successful travel training program, which will incur expenses for staffing, supporting materials, equipment and services, facilities, and general operating support. (See the section titled "What's Needed to Account for Your Expenses?" for a list of the components in a detailed financial chart of accounts for expenses.) A strong travel training program will achieve savings in paratransit service costs by shifting paratransit rides to fixed route services. Additional farebox revenues can accrue to public transit systems from older adults who never used transit before but now ride fixed route service. With such results, sustainable travel training programs generate financial benefits that exceed the costs of travel training.

How Do You Set Up an Effective Travel Training Program in Your Community?

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, described in the following paragraphs, should lead to a viable program.

Establish a Mission Statement and Set Goals

When setting up a travel training program, it is important to develop a mission statement of what you are trying to accomplish and to set goals. Be sure that your goals are achievable

and measurable. Contact other travel training programs and ask 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. Keep asking: you'll find that travel training professionals are eager to share their experiences and advice. It is important to reach out to programs in communities that have similar characteristics to your community and that could face similar challenges. Reaching out to experts who have been working in travel training is a great way to help determine what will work for your community. Several travel training programs offer consulting services on how to start a travel training program. Learning from peers will give you new ideas and new perspectives of what goes into a travel training program.

Gather Stakeholders

After establishing your mission statement and goals, it is important to gather stakeholders in your community. This could be done by establishing a working group or some other administrative structure that meets the needs of your community. The stakeholders in your community could include the transit organization or organizations, senior living facilities, and other senior-oriented organizations. At this point, it is important to set measurable objectives and a realistic timeline for program implementation and possibly modify the mission statement that was initially created.

Design the Travel Training Program

Analyze existing and potential local conditions, including demographics, spatial distributions, transportation services and areas they serve, potential program partners, and how the private sector can support and contribute to your program. Design alternative options; assess them and find the best option or options. When designing a program, ask other program operators what types of forms they prefer to use, what they would do if they could do something differently, and how they involved their community with the travel training program. There are many successful travel training programs and models, and understanding what difficulties and successes your peers have had can help you create a successful travel training program in your community. Using these resources and your own experience, develop a written travel training procedures manual that customizes travel training for your community. (Information about in-depth travel training manuals is provided in Appendices A and B.) It is important to create a program that is flexible and scalable based on need and budget restraints.

Confirm Funding

Create a budget that suites your community's resources and needs. Identify funding sources and obtain funding for your travel training program. It is important to determine how

many travel trainers your agency can afford and how much demand there is for travel training in your community. After the program begins, you will probably need to create outreach and promotion activities for the travel training program in order to maintain or increase an appropriate level of funding, obtain the continued support of established supporters of your program, and develop new supporters and funders.

Establish Administrative and Other Procedures

Establish data collection systems and administrative protocols and develop forms to capture key program data. You will need information about the participants who use the program and what happened to them as a result of their training. You will need to record items such as the hours needed to train individuals and all of the expenses associated with your program. Care should be taken to record all benefits associated with your program for all individuals and groups who benefited. To the extent possible, information should be recorded in quantitative terms. It is important for data to be collected in similar formats to capture key information; this will help to measure your success in future years. To determine program benefits and to provide information for improving the program, it is equally important to establish procedures for how these data will be summarized on a regular basis.

Conduct a Pilot Test

Before implementing the program that was developed by the stakeholders, pilot test the program by offering it to older adults and collecting information on expenses and outcomes. After the pilot test is completed, evaluate the outcomes of the pilot test and make necessary modifications, if any.

Evaluate the Outcomes and Modify Goals and Activities as Needed

Establish formal methods for obtaining data on the inputs and outputs of your travel training program. Create feedback loops from the stakeholders and from the customers and use them to assess your initial goals and plans. Create continuous improvement cycles to refine and improve your program.

What Resources Are Needed for an Effective and Sustainable Travel Training Program?

What Does It Cost to Provide Travel Training for an Older Adult?

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 between persons with disabilities and older adults. Also, not all travel training programs are recording the same expenses in a consistent fashion, making 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.

Funding for Travel Training

Travel training funding has historically come from a limited number of sources. The most common source is local funding, but the federal Safe, Accountable, Flexible, Efficient Transportation Equity Act: A Legacy for Users (SAFETEA-LU) legislation has provided the bulk of funding in most communities through five FTA programs:

- Urbanized Area Formula Grants (S. 5307).
- Formula Grants for Other than Urbanized Areas (S. 5311).
- Transportation for Elderly Persons and Persons with Disabilities (S. 5310).
- Job Access and Reverse Commute Program (JARC) (S. 5316), and
- New Freedom Program (S. 5317).

The funds for SAFETEA-LU continue for 3 years after their authorization; because the last year of SAFETEA-LU was 2012, these funds will remain available until 2015. With the passage of Moving Ahead for Progress in the 21st Century (MAP-21) the funding sources changed dramatically. While travel training is still an eligible expense, the categorical programs were consolidated:

- The JARC program (S. 5316) was eliminated and JARC funding is now available under Urbanized Area Formula Grants (S. 5307) and Rural Area Formula Grants (S. 5311).
- The 5317 New Freedom funds were eliminated, but New Freedom terminology was added to the S. 5310 Enhanced Mobility of Seniors and Individuals with Disabilities program. Thus, 55 percent of the program funding is available for traditional S. 5310 programs; 45 percent is available for projects that would have formerly been funded by S. 5317.
- Funds for the S. 5310 program increased, but there is increased demand on the S. 5310 funds with the addition of New Freedom eligibility, the requirement that 55 percent of the funds be used for capital purposes, and the change from a state-administered program to include locally administered programs in urbanized places of 200,000 persons or more.

Travel training still remains an eligible project expense for S. 5310 funds.

As a result of these changes, the FTA resources now available for Travel Training are as follows:

- SAFETEA-LU 2012 funds that will be eligible until 2015.
- MAP-21 funds, available starting in 2013:
  – S. 5310—Enhanced Mobility of Seniors and Individuals with Disabilities.
  – S. 5307—Urbanized Area Formula Grants.
  – S. 5311—Formula Grants for Rural Areas.

Transit Authorities, nonprofit agencies, and public agencies can also consider the following options for their travel training programs:

1. Local funding.
2. State funding—since every state is different, the agencies should check with their own state contacts.
3. Community Development Block Grants may be another potential resource, although they are not currently used for travel training very often.

Financial and Staff Resources

The 20 case studies conducted to develop this Handbook demonstrate the variety of financial and staff resources devoted to travel training in different communities. Most of the case study programs serve both individuals with disabilities and seniors with disabilities, and often serve older adults who may not have a disability. As such the programs may have found it difficult to identify the portion of their budget dedicated to senior travel training. As noted earlier, because both recording and reporting procedures differ substantially from site to site, the information reported by the sites may not be directly comparable, and some caution is required in interpreting the various reports.

- **The Kennedy Center** (Connecticut) and **NJTIP** (New Jersey), operating very similar program models serving large geographic areas within their states, spend about 13 to 15 percent of their budgets ($434,000 and $823,000, respectively) on senior travel training. Both programs have one travel trainer who specializes in training seniors. Neither program uses volunteers. Both programs get grants from statewide entities to offer senior travel training in specific areas of the state.
- Ride Connection's **RideWise** program in Portland, Oregon, spends $480,000 per year on its travel training program. In addition, RideWise uses 40 volunteers who contribute almost 1,300 hours per year leading group trips, co-

presenting senior training, serving as transit advocates, or participating as work group members.

- In Chicago, Illinois, the Regional Transportation Authority (RTA) travel training program has the largest reported training budget and the largest reported number of persons trained. This program's expenses of about $855,000 include services to both individuals with disabilities and senior adults. Its report of expenses is comprehensive. The RTA travel training program staff includes a manager, the travel training coordinator, five travel trainers, and contracted travel trainers. Until early 2013, all trainees were ADA eligible. The RTA now reaches out to all seniors and people with disabilities who are interested in travel training. As with other programs, the state is a major funding source. Chicago Lighthouse for the Blind helps train individuals with visual impairments.
- **Paratransit, Inc.** in Sacramento, California, has a budget of about $535,000, and supplements its budget with revenue from providing travel training program management and consulting services to other communities. Revenue for the program comes from vendor agreements with the ACRC and the California State DOR, which both pay an hourly rate for training their clients. Additional funding comes from a New Freedom grant, a JARC grant, and from the South Area TMA.
- **Via Mobility Services**, a Colorado nonprofit community organization, provides travel training services with funding from Boulder County, the City of Boulder, the DRMAC, the RTD, the United Way, and the Rose Foundation. Many of these latter sources provide funding to the overall Via Mobility Services, which then allocates them among its many programs. Via Mobility Services has received contracts with the Colorado DOT for travel training. It reports spending $145,000 a year on salaries, fringes, supplies, outreach, and other expenses.
- **Riverside, California's 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, with one of the three trainers focused on older adults. The annual budget for the entire program (including services to non-senior populations) is about $212,000. Funding for the Freedom to Go program is provided from federal JARC and New Freedom funds, and local and state matching funds.

Only three of the programs are in traditional transit agencies, and the Chicago RTA is not an operating agency. The private nonprofit nature of the other agencies shows the social services aspects of the programs. There is a strong reliance on partnerships and working with other social services agencies to promote and market the travel training services.

Staff Qualifications

Competent staff members who excel in customer service are 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. As previously mentioned, the travel trainers must enjoy working with people, must be confident in what they do, and must be able to connect with participants. Personal traits of trainers such as empathy, likability, respect, patience, and kindness are central to this ability. (See "Hiring Travel Trainers with the Right Personal Qualities" in Chapter 3 for more information on this topic.)

Volunteers can play a critical role in reaching out to the wider community, especially when resources are scarce. For example, 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.

Summary

All of the 20 programs that were investigated have resource needs and resources that are very specific to local conditions. Beyond these factors, specific program designs dictate the resources necessary for implementation.

How Can You Establish and Implement Programs to Train and Support Travel Trainers?

Travel trainers require a range of skills to train older adults to use public transportation service independently and successfully. Travel training programs should focus on preparing trainers to provide trainees with the knowledge and skills to plan travel and make independent decisions to travel safely.

The following standards should underlie the travel training program:

1. The travel training program must have clear goals.
2. Training staff and implementing training should be completed with the end outcomes in mind—giving customers the capabilities they need, promoting self-sufficiency, and facilitating suitable and efficient travel experiences for a particular individual.
3. While group travel training can introduce seniors to public transportation, successful sustained use of public transportation often requires customized, one-on-one training to meet an individual's needs.

- The two key components are (1) design of the travel training program and (2) staffing.
4. Stability and sustainability of funding are critically important.
5. Travel trainers should possess the following:
   - High level of education and experience—college degree, experience working with target trainees, or combination of education and experience. Experience need not be in travel training alone or working for a public transportation system. Work in a social services setting is highly valuable. It is very important for travel trainers to understand and connect with their customers, their life circumstances, and how travel training may improve their quality of life.
   - Demonstrated knowledge of and ability to travel independently and safely on the public transportation system themselves.
   - Good judgment on the preparedness of trainees to learn and travel.
   - Empathy and patience for trainees, the challenges that trainees face, and the uncertainties that they often feel.
   - Excellent oral communication skills.

It is extremely important that solid, working relationships exist among the local public transportation system and the social services community, especially those agencies providing services to and advocating for older adults. These relationships may take time to build, but not building them may well compromise the success level that a travel training program achieves. Travel training programs can be housed effectively in a public transportation agency or outside as a program of one or more social services agencies.

The programs developed by Easter Seals Project ACTION and United We Ride represent excellent models from which to establish standards for staff training and for implementing programs to train and support for travel trainers. Other organizations that may have a focus on seniors, such as well-established travel training programs and organizations like the Association of Travel Instruction, will also have valuable models.

What's Needed to Account for Your Expenses?

Extensive information is available on budgeting and cost accounting. For example, see *TCRP Report 144: Sharing the Costs of Human Services Transportation*, and also *Financial Management Guidelines for Rural and Small Urban Public Transportation Providers.*

The main reason for monitoring the program's finances and the rest of its operations is to do a better job, which means getting better performance results from existing, often limited, resources. To do that, the program will need to keep track of

its expenses, revenues, and the results of its actions. (Program results are discussed in the next section.) All of this information serves as a basis for informed management decisions about day-to-day operations and longer term issues about modifying policies, procedures, and processes.

Working with Budgets

This process starts with developing a budget. A budget is a forecast of future revenues and of the costs of the resources necessary to produce these revenues. It can be considered a plan of action for the coming months and years, and can be a useful tool in determining the direction of the organization as well as monitoring and controlling its results.

The first main benefit from preparing a budget is that it forces management staff to sit down and formally plan what they want and expect to happen in the future. Various alternatives can be considered during the budgeting process, including curtailing or eliminating certain services, extending profitable services, adding new services, raising or lowering the rates being charged, and decreasing certain expenses.

Establishing a budget requires completion of the following six steps

1. Analyzing the goals and objectives of the organization and its programs.
2. Estimating revenues and direct expenses for each program.
3. Estimating overhead costs.
4. Estimating general funding revenue.
5. Explicitly listing major assumptions used to prepare the budget.
6. Pulling it all together into a budget form.

Revenues and expenses budgeted should be regularly compared to actual amounts received and spent; monthly reviews are typically recommended for optimal financial control.

Accounting for Costs

As described in ***TCRP Report 144: Sharing the Costs of Human Services Transportation***, "the accounting approach recommended and used by successful business operations and transportation systems is called ***full cost accounting***. Using full cost accounting means that **all costs of providing transportation services are considered, and that all the different kinds of expenses incurred are recorded**. The total costs include any commitment of or use of time, money, physical resources, and other assets of the system used in the accomplishment of program objectives. In full cost accounting, **a value is given to these commitments whether or not they result in immediate out-of-pocket expenditures** (for example, the value of the time provided by volunteer drivers). . . . The primary reason for using full cost accounting is that **all costs must be paid sooner or later by someone**."

A detailed **financial chart of accounts** is one of the most important components of cost accounting. The chart of accounts can **track all kinds of expenses** related to providing travel training, transportation services, or other program components. A key element of the chart of accounts is the establishment of expenditure classes. For public programs in general, and travel training programs in particular, 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.

Each expense category should have detailed subcategories. For example, some transportation operators have separate expense categories for salaries paying for training or overtime. Used together, the 13 categories of expenses fully describe all costs of travel training services. At this point in time, travel training programs employ significantly different charts of accounts; this makes program-to-program cost and outcome comparisons too difficult to confidently conduct. Industry-wide standards for cost accounting are clearly needed.

How Do You Measure the Benefits of Travel Training?

Measuring the results—the benefits—of a travel training program is essential to support older adults who have been trained, attract others who may need training, achieve sustainable funding, and build broad stakeholder and community support.

Benefits of Travel Training

As previously mentioned, training older adults to use fixed route service provides a range of benefits:

- For older adults:
  - Increased tripmaking, resulting in better mobility.
  - Improved travel—greater flexibility on where and when to go; less dependence on paratransit and others; more choices in destinations.

- Independence and quality of life—social connections.
- Lower cost of travel compared to paratransit.
- For public transit systems:
  - Reduced use of paratransit service, resulting in cost savings (cost avoidance).
  - Higher use of fixed route service compared to other modes (increased fixed route ridership; reduced or not increasing ADA paratransit ridership).
  - More effective use of fixed route services (increased fixed route ridership).

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. In the design of a travel training program, it is essential to anticipate what the benefits will be and to build the information base to measure the benefits.

Methods for Measuring Benefits

To measure benefits, information is needed prior to the start of training, during training, and at intervals after training. In addition to providing information to measure benefits, periodic contact with trained seniors enables trainers to periodically assess current travel behavior, uncover issues with travel, and conduct refresher training to enable more frequent travel.

Benefits Can Be Measured by the Following Methods

- Interviews and assessments before training is started and upon completion of training.
- Written surveys at periodic intervals following completion of training—at 1 month, 3 months, 6 months, 12 months, and twice a year thereafter.
- Tripmaking behavior can be measured with electronic fare media, such as that used in Riverside, California, and Spokane, Washington, designed to track the specific trips as they are made.

Interviews and Assessments

Interview and assessment questions are designed into forms that are filled out before, during, and upon completion of training. Forms for keeping records of training should be designed to support the collection of data that will document results and benefits. To accurately measure the changes that travel training can produce, it is important to have detailed records of how trainees traveled before their training, such as how many trips they took on which modes, how much those trips cost, and desired trips that they could not take.

Surveys

Surveys may be completed via a telephone interview or as a mail-back survey. A telephone interview is preferred as it provides an opportunity for a travel trainer to talk to a trainee and form a judgment about the riding behavior of a senior trainee and decide whether or not to offer refresher training. Results of surveys can be reported individually. The data can be aggregated to document overall travel training impacts and results. Follow-up survey forms should be designed to document changes since pre-assessment and completion of training as documented in forms and records.

Electronic Fare Media

Older adults who have been trained may be issued electronic fare media encoded to create data records for specific seniors as they travel. The electronic media is typically issued to seniors who receive a free pass to ride following completion of training.

> This [electronic fare media] is a great opportunity to quantify benefits and should be encouraged wherever possible.
>
> *Annette Williams, San Francisco MTA*

How the Benefits Are Determined

The best programs collect information from program participants at regular intervals. They also maintain files on individual participants. The programs typically collect information from participants at least twice a year by directly contacting the participants. Several of the programs contacted participants through four phone calls over the course of the first year at 3 months, 6 months, 9 months, and 12 months after training was completed. Follow-up calls usually focused on the use of transportation, problems identified, any need for retraining, and additional support needed, if any. Use of transit was usually self-reported; Riverside RTA's use of electronic tracking was an exception. Mail surveys are used in some circumstances. Ride Connection conducts satisfaction surveys of participants 1 year after they start participating in any of that agency's programs.

The Kennedy Center conducts follow-ups for one-on-one training participants at 1 month, 3 months, 6 months, and 12 months post-completion.

- The Kennedy Center Exit Summary Report includes details on services, outcomes expected and achieved, reasons for exit (presumably including completion of program),

recommendations for future Kennedy Center Services, and referral to other non-Kennedy Center Services.

- The 6-month follow-up collects outcomes of the referral, feedback on services received and how they can be improved, current status pertaining to goals, and a determination of whether further services are needed.
- The 12-month travel training follow-up collects information on whether or not the individuals still use public transportation, whether they need additional training, the cost of their transportation per week, explanations if they are not using public transportation, the biggest difference for them as a result of travel training, the number of round trips they take in an average month, and whether or not they have people in their network that travel with them or assist them with travel. These follow-ups are filed in participant case records, but the program has not summarized outcomes for all individuals in the program.

For one-on-one training efforts, each trainee usually has specific goals developed for each training effort and the trainers monitor progress. Ongoing assessments are common. Travel trainers and the travel training staff often see participants that they have trained using public transportation after they have been trained.

Assessing Benefits and Costs

Recording and Reporting Costs

Most travel training programs that have estimated the benefits of travel training find that these benefits substantially outweigh the costs of the programs. A good place to start in the estimation process is to obtain an accurate count of the costs of the program. Program costs should be reported as shown in the "Accounting for Costs" section in this chapter. As noted there, **all program costs—labor, benefits, administration, facilities, and everything else—need to be recorded and reported**.

Are there additional costs associated with greater use of fixed route transit by older adults? In most instances, no changes are made to fixed route services to accommodate older adults who have been travel trained, so the marginal costs of these additional passengers on the fixed routes is zero.

Benefits of Travel Training

The majority of the benefits of travel training have not yet been successfully expressed in monetary terms. These include significant benefits such as increased access and mobility that may open up countless opportunities for cost savings and income generation; and aging in place with its potential for cost savings through fewer nursing home placements, reduced isolation, and increased life satisfaction. While additional research will be needed before such benefits can be quantified and monetized, they can be described as follows:

- Reductions in travel costs for customers who previously used ADA paratransit and now use fixed route services for those trips.
- Reductions in costs to transit agencies from a decrease (or a reduction in the rate of increase) in paratransit trips.
- Increased income to transit providers from older adults who now make more trips using fixed route services.

At the time of submission of this report, many transit agencies incurred costs for each paratransit trip from more than $20 to more than $50. Typically, a trip on fixed route transit costs from $3 to $5. The costs of ADA paratransit services are highly sensitive to the numbers of trips taken; the costs of fixed route transit services are not very sensitive to the numbers of trips taken. When a transit agency is able to shift trips from paratransit to fixed route services, they can achieve a substantial cost avoidance, often in the realm of $30 or more per trip. To the extent that travel training for older adults can achieve this shift in travel mode, it can result in a substantial financial benefit for the transit agency. The other monetary benefits are small in relation to those achieved by shifting rides from ADA paratransit operations to fixed route services, but they are still significant to those parties realizing those benefits.

The diversion of trips from ADA paratransit to fixed route service requires careful accounting. An accurate count, as opposed to an estimate, would require that the number of trips on ADA paratransit and fixed route service be known before and after travel training for those individuals who have completed travel training. As noted earlier, electronic records of tripmaking are attractive because they are not as labor-intensive as other options for obtaining these data.

Benefit/Cost Ratios

The largest travel training programs contacted for this study spend hundreds of thousands of dollars on travel training for older adults and persons with disabilities and achieve millions of dollars in benefits. Ride Connection reported that its RideWise program has a 3 to 1 benefit/cost ratio; NJTIP reported a benefit/cost ratio of about 1.2 to 1. The cost avoidance in Sacramento for all trainees has been calculated to be more than $20 million over the last 17 years. In Spokane, the STA Mobility Training program has allowed the transit provider to avoid or defer nearly 32,000 ADA paratransit trips per year, resulting in a cost avoidance of $633,989 per year. These programs typically calculate benefits and costs over a 1-year

period at the most; cost savings can logically be expected to accrue for years after travel training, so these estimates are quite conservative.

The simple model of the ratio of benefits to costs as a result of travel training is thus

$$\text{Benefits} \div \text{costs} = \text{benefit/cost ratio}, \text{ where}$$

$$\text{Benefits} =$$

Reductions in travel cost for customers who used to use ADA paratransit and now use fixed route services for those trips

plus

Reductions in costs to transit agencies from the decrease in paratransit trips among persons who were travel trained

plus

Increased income to transit providers from older adults who were travel trained and now make more trips using fixed route services,

and

$$\text{Costs} =$$

Cost of the travel training program

plus

Additional fixed route transit costs (if any) incurred as a result of having former ADA paratransit riders using fixed route transportation.

There are many additional factors that could be included in the overall equation if data were available to support their inclusion. If trainees achieve greater independence, less time and direct expense is required from caregivers who then less frequently need to provide transportation or other services. Benefits of increased mobility include these:

- Wider ranges of purchasing and income-producing capabilities (both of which have secondary benefits to the community).
- Increased access to medical facilities, which reduces long-term health care costs.
- Increased social interaction and increased ability to age in place, both of which lead to improved quality of life, increased life satisfaction, and reduced nursing home admittance, all leading to reduced care costs for older adults.

More attempts are being made these days to monetize such benefits, but overall consensus on exact measurements is currently lacking. For the moment, the above equation represents a quite conservative estimate of the benefits; the true benefits of travel training are likely to be much larger than can be measured at this time.

How Do You Set Up an Effective Outreach, Education, and Marketing Program?

Outreach, partnership development, and marketing represent the most important ways that communities, agencies, and advocates learn about travel training programs. This is most important in introducing a new program and maintaining an existing program as professional staff changes require keeping new leadership and supporters fully informed and committed to the travel training program.

All travel training programs should have key program partners. These partners are agencies that are committed to helping older adults be in a position to maintain their independence and quality of life. They offer strong services to seniors themselves. **The stronger the relationship with program partners, the better: they are the first line of customers.** Clarity and focus is very important. Share with program partners your commitment to older adults and your expectations and outcomes for travel training marketing that will result in older adults traveling successfully and more often.

Build continuing relationships and expectations and outcomes with these:

- Agencies providing services to older adults, such as senior living facilities and senior centers.
- Agencies that advocate for older adults, such as councils on aging and AARP.
- Public transit systems.

If your organization is a public transit system, you know the financial benefits that come with using fixed route services. Identify locations where older adults congregate: senior centers, congregate meal sites, and so forth. Visit these locations just to meet staff and understand the activities that are provided there. Outreach and marketing work best when you know and understand why older adults are there and how travel training may help their lives.

Identify key agency staff; develop and maintain relationships. Let them know that they can call anytime.

Develop programs and supporting materials for group presentations, tailored to the audience at hand. Knowing and understanding a setting helps to personalize presentations, not just the presentation itself, but the content and feelings behind the messages. Especially for in-person and video presentations, those presentations that feature individuals whose characteristics closely resemble those of your intended audience are more likely to capture the audience's attention and convey the message that you want.

Relationship-based contacts (for example, word of mouth reports) are highly effective; travel training programs should regard staff within agencies serving or advocating for older adults as customers. These staff can be significant in affording

access to seniors or referrals to other agencies for access to seniors.

Work closely with program partners. Program partners are agencies with a strong interest in having seniors receive travel training. Their interest is likely to be narrowly focused on older adults as their clients, but most also recognize that travel training can open doors for seniors to be independent and travel within their communities. Program partners represent opportunities for formal outreach and marketing and effective word of mouth communications.

Key partner agencies and other agencies serving and advocating for older adults can be more effective in encouraging senior travel training if they have better and deeper knowledge of the travel training program. An essential element of outreach and marketing is educating staff partners and other agencies to understand the travel training program and help older adults decide to receive training.

What Tools and Techniques Are Useful?

Travel Training Components

Travel training programs often contain the following components:

- Orientation.
- Group training.
- One-on-one travel training.
- Follow-up or refresher training.
- Travel companions, "bus buddies," or travel ambassadors.

The core components are orientation, group training, one-on-one training, and follow-up or refresher training.

Orientation

Orientation sessions are designed to introduce a group of older adults to the concept of travel training and to encourage them to enter a training program. The Association of Travel Instruction (ATI) defines transit orientation as "group or individual activity conducted for the purpose of explaining the transportation systems, options, and services available to address individual transportation needs; use of maps and schedules as resources for trip planning; fare systems; use of mobility devices while boarding, riding, and exiting; vehicular features; and benefits available."

Group Training

Group training, also called familiarization by ATI, introduces a group of older adults to the use of fixed route ser-

vice. Group training typically includes classroom time and one or more practice trips to a nearby location with which the seniors are likely to be familiar. ATI defines this activity as "individual or small group trip activity to facilitate use of transportation systems with a travel trainer accompanying experienced traveler(s) on a new mode of transportation or route to point out/explain features of access and usability."

One-on-One Travel Training

In one-on-one travel training, the travel trainer works directly with one older adult, focused on providing the older person with the skills necessary to travel safely and effectively. While training may be for a specific trip, training has the potential to provide the knowledge and skills to travel to any location that the public transit system serves. Whether training for a specific individual is focused on the ability to travel throughout the public transit system or on a specific route will depend on the needs and capabilities of the older adult. Most training programs emphasize regularly used fixed routes to reach frequently used destinations. With individualized training, the training lasts as long as required and can vary from person to person. The ATI calls this activity travel training and defines it as "one-to-one short-term instruction provided to an individual who has previously traveled independently and needs additional training or support to use a different mode of travel, a different route, mode of transit, or travel to a new destination; or one-to-one comprehensive, specially designed instruction in the skills and behaviors necessary for independent travel on public transportation provided to an individual who does not have independent travel concepts or skills to go from point of origin of trip to destination and back."

Follow-Up/Refresher Training

Refresher training is targeted training that is oriented to helping older adults to stay current on their travel skills. Refresher training could also help trained older adults adjust to a new residential location or the environment surrounding new destinations. It might focus on helping trained older adults learn how to use new assistive devices, such as a wheelchair, walker, cane, or simply dealing with a decline is capacity. Refresher training may teach older adults to substitute an easier trip or to help them transition to paratransit service, should that be the best course of action. Refresher training may also be required if a former trainee wants to learn new routes to go to new destinations because of changes in the individual's needs that are no longer served by the fixed routes on which they were previously trained.

Travel Training Curricula

Travel training curricula are designed to teach all of the skills that older adults must have to travel safely and confidently. This includes planning a trip, gathering the information necessary to make a trip, and developing the skills and knowledge associated with travel generally or for a specific trip. Older adults must be trained to develop the knowledge and skills to plan their trip and the path they should take, details of the route to reach their destination, and how to get back.

- Preparing to take a trip:
  - Knowing where to get information about traveling on the local public transit system. This may be telephone or web site, or other means. Wireless technology should be used advantageously.
  - Getting to know how to access customer service and the kinds of services and support it can provide.
  - Deciding where to go and how to get there using fixed route service.
  - Determining the route to take to get there—bus route or routes to use and the schedule of service for weekdays, Saturdays or Sundays—and the route to get back.
  - Whether or not a transfer between buses is required and the best location to make that transfer.
  - Location of the bus stop.
  - Developing familiarity with the bus environment.
- Developing the knowledge and skills to make the trip:
  - Becoming familiar with bus schedules and how long it will take to get to a bus stop in order to limit waiting time at the bus stop.
  - Allowing time for travel to the bus stop.
  - Navigating the path to the bus stop, including dealing with barriers.
  - Identifying which bus to catch and signaling the bus to stop, if not at a bus stop.
  - Getting on the bus and paying the fare.
  - Recognizing where to get off the bus and signaling the driver to stop.
  - Exiting the bus safely.
  - Understanding riding rules and behavior.
  - Crossing streets safely.
  - Securing a wheelchair.
  - Preparing for unexpected circumstances or being lost.
  - Knowing what to do in an emergency.
  - Advocating for oneself.
  - Knowing that it is okay to ask a bus driver questions.
- Getting back, or making the return trip:
  - Becoming familiar with the surroundings at the bus stop for the return trip.
  - Getting to the return bus stop.
  - Recognizing where to get off (it always looks different the first time when returning).

Training Techniques

In training older adults to travel, programs use some of the following techniques:

- Meeting with the senior to discuss and help plan a trip.
- Meeting with senior's support network—family, care provider, guardian.
- Accompanying the senior on a trip.
- Letting the older adult take a planned trip, with the trainer anonymously shadowing the trainee.
- Providing support materials, including a pocket card.
- Reviewing refresher information and videos posted on web site.
- Conducting assessments of safety skills.
- Offering information on how to read a schedule and develop a trip plan.
- Teaching how to use an online trip planner.

What Are Some Obstacles That Your Travel Training Program Might Encounter?

When developing a travel training program, there may be challenges to face or obstacles to 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. Staying informed about new or changing sources of funding at all levels of government, but especially the federal level, is crucial. Travel training programs must understand how to create a scalable program that can adjust to the economy. If possible, tracking the cost savings of travel training is important to understand how much money a program is saving the community, so that arguments can be made for more funding support.

At the time of submission of this report, federal funding for transportation programs may face more serious limitations than before. This may make it harder for travel training programs to find appropriate funds; on the other hand, this may make travel training more attractive because of its potential to address rapidly escalating paratransit costs. Living with these uncertainties will be a challenge.

The nature of travel training programs may in itself be challenging. The first issue is that 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 trying a travel training program. Second, by their nature, travel training programs are the types 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 and benefits of travel training and documenting public transit cost savings need to be key tasks of the programs. Third, certain weather or topographical conditions can be disincentives 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. Finally, as a relatively new industry, a lack of standards in training, accounting, and evaluating is hampering the full development of travel training programs.

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

- The frequently negative media culture surrounding the use of public transit: travel trainers 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 can restrict participation in travel training programs.
- Difficulties in identifying a continuing stream of trainees: many older persons who need transportation do not live in senior housing and they might not be active in senior center or other human services programs. Targeting program efforts to groups or organizations is economically feasible but may miss many individuals who could benefit from the services; finding potential trainees living in their own homes but unaffiliated with any service agency can be one of the biggest challenges for outreach efforts.
- Staying in touch with travel-trained older adults whose tripmaking may be lessening is important but may be time consuming.
- A reluctance (reported by several travel trainers) among some older adults to ask for assistance while traveling.

- Concerns for individual welfare: some resistance has been seen among older adults and often among their family members regarding the physical challenges and potential risks of riding public bus lines.
- Limitations in funding and staffing: these limitations may constrain the amount of outreach that is possible.
- 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 will help to ensure 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 that the needs of transit agencies are met by providing growth potential for fixed routes, increasing ridership, and potential savings from deferred paratransit trips. Further, this collaboration with social services and other agencies serving the needs of older adults provides access to potential participants and ensures that transportation needs are addressed simultaneously with other human and social services needs.

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. Negative media attention concerning public transit may cause some people to believe that public transit is not a safe mode of travel. In some communities, there may be a lack of a clear path with sidewalks to bus stops and to destinations, particularly in suburban and rural areas; having to cross wide and heavily traveled streets can be daunting in large urban areas. Environmental obstacles can include uneven terrain and poor or lack of curbing at bus stops.

How Can You Integrate Travel Training with Mobility Management Efforts?

Travel training is part of the mobility management family of services. Mobility management encompasses a range of activities focused on making effective and efficient use of transportation resources and helping people find a travel

alternative or schedule a ride. The focus on treating individuals as customers is a key component of the 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. Creating a "one-stop shop" where individuals can find solutions to their transportation challenges is another common feature of mobility management programs.

The purpose of mobility management, like that of travel training, is to open up a person's world to a variety of travel options. This person-centered social services model seeks to increase individual independence by offering a high level of individual choice to highly individual travel needs.

Mobility management can be as simple as offering a telephone referral service or a web-based directory of available transportation services. It can provide education and counseling to older adults about the options available. It can help older adults find the service that is the best match for their travel need. On a broader, regional level, mobility management programs facilitate the coordination of transportation services among public transit, human services, and private providers. A service that is emerging more and more is the concept of a call center that schedules rides for people and assigns those rides to participating transportation service providers. Rides can be scheduled by older adults or agencies serving older adults for travel on public transit, human services, and private transportation services. In fact, these services can be web-based, in addition to telephone-based customer service. One benefit of effective mobility management is that it helps people make better use of fixed route services, services that are in place, open to the public, and cheaper than any alternative transportation service.

Mobility management programs may be operated by a regional transportation agency, a public transit system, or a not-for-profit agency. Travel training programs are a logical component of a mobility management program. Travel training programs should take responsibility for finding out if there is a mobility management program, sometimes called a coordination program, in their area. If there is, the travel training program has found an important strategic partner. It is important for the travel training program to understand the mobility management program's range and depth of services and vice versa. Travel training programs can create mutually supportive benefits from close connections with public transit authorities and mobility managers.

How mobility management services are offered will determine how a travel training program can be integrated with it. The integration could be achieved in several ways, each

of which can help people, including older adults, meet their mobility needs:

- The mobility management program could become a program partner of the travel training program.
- The travel training program could be merged into the mobility management program.
- The mobility management program could be started by or merged into an agency's travel training program.

Integrating travel training and mobility management programs depends on the strategic players in the region and the levels of program development already in place. If travel training is a new program, merging into a mobility management program may be a logical approach. If the travel training program is fully developed with a strong history of service, it might be logical for the travel training program to expand its services to encompass mobility management. Whatever the case, a clear, compatible focus on customer service is essential.

Recapping These Questions

This chapter addressed these frequently asked questions about travel training:

- Why get involved with travel training?
- What travel skills will you try to promote?
- What makes an effective travel training program?
- How do you set up an effective travel training program in your community?
- What resources are needed for an effective and sustainable travel training program? How do you get those resources?
- How can you establish and implement programs to train and support travel trainers?
- What's needed to account for your expenses?
- How do you measure the benefits of travel training?
- How do you set up an effective outreach, education, and marketing program?
- What tools and techniques are useful?
- What are some obstacles that your travel training program might encounter? How can you deal with them?
- How can you integrate travel training with mobility management efforts?

Additional information on travel training practices can be found in the case studies in Chapter 6. Contact information for leaders of these travel training programs and other experts is found in Appendix A.

CHAPTER 5

Improved Travel Training Practices

As previously mentioned, travel training is relatively new as a profession. The vast majority of its practitioners are highly dedicated, resourceful, hardworking, and sensitive to individual needs. 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.

This can be done in the following ways:

- **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** 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 and analyze 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 include the following:

- **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.

CHAPTER 6

Brief Case Studies

Highlights of the Case Study Selection Process

Case studies often offer great insights about program operations and outcomes. An extensive search for exemplary travel training programs was conducted using expert opinion, previous literature, and an Internet search. The case study selection methodology is outlined in detail in *TCRP Report 168: Travel Training for Older Adults*, *Part II: Research Report and Case Studies.*

Information was collected on more than 80 travel training programs. The search found 70 travel training programs that were either targeted for older adults specifically, disabled people (including older adults), or people of all ages and abilities. Sixty-two of these programs were in the United States; they were located in 26 states.

Contents of the training varied 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 training materials. A majority of the programs utilized more than one training method.

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 had specific references to older adults as target populations as well as programs that might reasonably address the needs of older adults in programs for individuals with disabilities. These programs were ranked on the level of information that they could provide for this project on 13 factors, which included the program's willingness to provide information that can be publicly shared, the targeting of the program

to an older adult audience, the degree of customization of training, the availability of before and after assessment and follow-up data, the total years of experience in travel training, and measures of success that were specified and applied.

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 the following:

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

For each of these seven cases, members of the research team visited these sites for multi-day observations and interviews with program staff and key local stakeholders.

Data Limitations

A number of problems were encountered in assembling the data for these case studies. Not all case study participants were able to provide detailed information about outcomes, budgets, and spending. In addition, because each program has its own idiosyncratic operational approach and reporting requirements for its funders, the information sought was often located in different places within documents and reports, and often only estimates were available. Reporting requirements also differed

based on the funding source for the program. A number of the measures reported, such as number of older adults who received training or funding for training older adults, were based on well-informed estimates rather than on auditable results.

All of the seven case study programs offer travel training to older adults as a component of, or outgrowth of travel training for individuals with disabilities, including school-aged students with disabilities near or at the end of high school. Some case study programs reported results for the overall program, but not for the portion of the program targeted at older adults. In several cases, older adults constituted a small portion of the overall training program, sometimes less than 10 percent. Far more detailed reports and outcomes were available for one-on-one training versus group training, but some 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 older adults because group training appeals to persons interested in learning and socializing with others. However, because group trainings are often a brief engagement between the travel training program and the older adults who participate, the opportunity to conduct follow-up activities is limited, so information on outcomes and success of group activities was less complete than the information for one-on-one training activities.
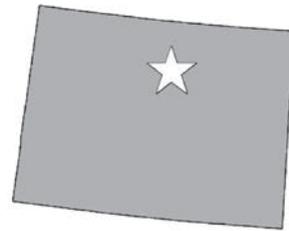
Case Study Reports

The following pages provide summary descriptions of the seven in-depth case studies.

VIA MOBILITY SERVICES TRAVEL TRAINING
VIA MOBILITY SERVICES
BOULDER, COLORADO

Program Name	Via Mobility Services Travel Training
Sponsoring Organization	Via Mobility Services
Address	2855 North 63rd Street
City, State	Boulder, CO
Organization Type	Private nonprofit corporation
Training Program Began	2003
Service Area	Boulder County and City of Denver, CO
Service Area Population	2,894,071
Service Area Size (sq mi)	9,165
Data for Year Ending	2012
Annual Training Expenses	$145,037 (salaries, fringes, supplies, outreach, other expenses)
Major Funding Sources	Boulder County, City of Boulder, Denver Regional Mobility and Access Council (DRMAC), Regional Transportation District (RTD), Rose Foundation
Partnering Agencies	DRMAC
Key or Unique Factors	Comprehensive set of travel training services

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.

The target audience for Via Mobility Services in Boulder 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 automobiles. 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."

Program Operations

Program Components

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. The Get on Board (GOB) program, conducted in partnership with 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 offer more transportation options to individuals with ADA paratransit certification. This program was halted in late 2012 due to lack of funding, but Via recently received a

new 2-year contract to begin providing travel training again. Program components include the following:

- **One-on-one travel training (ERP, GOB):** 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.
- **Group training (Seniors on the Move):** Seniors on the Move is group travel training targeted to older adults. It 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 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 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 to learn how to use public transit.
- **Train the Trainer Program (through partnership with DRMAC):** This training is designed for organizations who 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.
- **Volunteer Transit Ambassador 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.

Resources

Resources for the program come from a variety of sources including foundations, federal funding, a contract with DRMAC, registration fees, the United Way, the City of Boulder, and Boulder County. 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 Rehabilitation, and Via has been awarded federal funding (Section 5310 funds) to create a metro area-wide program in 2014. Staffing resources for the travel training program include the

coordinator who represents the travel training program and 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.

Program Partners, Promotion, and Outreach

The Via Mobility Services Travel Training Program partners with DRMAC to offer travel training as well as train the trainer services. Recently, one of Via's travel trainers 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. Outreach for the Seniors on the Move program occurs through letters and fliers sent to all senior centers and independent living communities. General outreach activities for Via's overall travel training program include brochures, newsletters, and presentations to agencies that have traditionally referred people. Outreach is also conducted through the Volunteer Transit Ambassador Program.

Results

The program identifies several benefits to individuals: freedom to travel spontaneously, ability to travel independently, more transportation options, greater community involvement, increased confidence in travel abilities, and lower transportation costs. Several program staff noted that the most compelling evidence of success comes from individuals' personal stories about how their quality of life has been enhanced. Paratransit is considerably more expensive than public transit, so to the extent that people can use the latter rather than the former, there can be substantial cost savings. 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). In 2012, Via Mobility trained 168 seniors, 38 in one-on-one training (with estimated per person costs of $1,500) and 130 in group training (with estimated per person costs of $22).

Reasons for Success

Via Mobility attributes the success of its programs to the following principles and attributes: personal qualities of the trainers, strong leadership, considering how travel training can succeed in light of local transportation resources, local conditions, and individual needs and abilities; 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.

Challenges

Like any lead organization in a major coordination effort, the Via Mobility Services Travel Training Program has faced some challenges. The following issues were identified by program staff: outreach is critical, successful collaboration requires trust, reaching the people who need transportation is often challenging, certain segments of the target audience pose special challenges for training, adequate infrastructure is needed, and continuity of funding is not ensured.

Program Replicability

Several features of the Via Mobility Services Travel Training Program stand out as noteworthy and should be taken into account in any efforts to replicate the program in other communities. 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.

RTA TRAVEL TRAINING PROGRAM
REGIONAL TRANSPORTATION AUTHORITY
CHICAGO, ILLINOIS

Program Name	RTA Travel Training Program
Sponsoring Organization	Regional Transportation Authority of Northeastern Illinois
Address	175 W. Jackson Blvd, Suite 1650
City, State	Chicago, IL
Organization Type	Public Transportation System, special purpose unit of local government, and a municipal corporation of the State of Illinois
Training Program Began	1990 through community contracts, RTA brought in-house in 2005
Service Area	Cook, DuPage, Kane, Lake, McHenry, and Will Counties
Service Area Population	8,000,000
Service Area Size (sq mi)	2,443
Data for Year Ending	2012
Annual Training Expenses	$855,334—all trainees were ADA eligible until 2013
Major Funding Sources	RTA Operational Funds
Partnering Agencies	Chicago Transit Authority (CTA), Pace, Metra, and approximately 500 senior centers and social services agencies
Key or Unique Factors	Emphasis on safety

Background

The Regional Transportation Authority (RTA) is an umbrella organization established by the State of Illinois for planning and budget oversight of the CTA, Metra, and Pace transit agencies. 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 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 in the creation of these services. However, in 2004, the decision was made to bring the travel training program in-house, and in 2005, the transition was completed. The Chicago Lighthouse for the Blind remained under contract and still does travel training for visually impaired clients.

In 2013, the RTA decided to expand the travel training program to include non-ADA complementary paratransit applicants. Travel training had been a part of the ADA paratransit application process; many people misunderstood and felt they had to participate in travel training, even if they weren't interested, in being approved for ADA paratransit services. This led to much unproductive staff time and effort. The current strategy is to still offer training to those interested in ADA paratransit service, but focus more on community outreach to seniors who are not ADA eligible but could benefit from travel training.

Program Operations

Previously, the target audience for RTA's travel training program was exclusively applicants for complementary ADA paratransit services. The RTA has shifted this approach to include identifying perspective participants through community outreach. This new emphasis started in January 2013 and will probably increase the number of seniors being travel trained. The entire process is paperless, which is beneficial but can also be challenging. About 2,074 individuals are trained per year; no separate records are kept of the number of seniors trained.

Program Components

RTA's travel training program includes one-on-one training and group training.

- **One-on-one travel training:** In 2012, 150 customers received one-on-one travel training. The least amount of time to train

was 12 hours, while the longest was 174.5 hours. The average was about 44 hours. The travel trainers train individuals for up to three specific trips and work with the individual until he or she can do the trips with no assistance. Once the participant can do a trip alone, the trainer then verifies her/his capabilities by trailing the client on a trip. Once the trainer is sure the client can do the trip alone, the client is trained on a second trip. Each individual can participate in the travel training program as many times as desired at no cost.

- **Group training** is RTA's primary method to approach non-ADA clients. Group training sessions are held in local settings, often in conjunction with another senior meeting. Most of the meetings are with senior groups and consist of the following:
  - A general introduction about the three RTA service providers: Metra, CTA, and Pace.
  - A PowerPoint presentation that discusses the services and also shows people how to ride.
  - A description of fares and how to pay in different ways.
  - The discussion ends with an emphasis on safety: how to use the service in a safe manner and what to do if problems arise.
  - Individuals can be referred for one-on-one training in order to address their more specific training needs.

RTA has one trainer who makes presentations to groups. RTA prefers small group presentations of 20 to 25 people, but has conducted presentations to groups of more than 80 people. The presentations explain 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 one-on-one training has been targeted primarily to people with intellectual or cognitive disabilities. The training program includes very intensive one-on-one activity. This one-on-one process includes a very specific individual plan. This 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 training. The waiting list for general orientation is 1 month.

Resources

RTA travel training program staff includes the manager, the travel training coordinator, five travel trainers, and a con-

tract with the Chicago Lighthouse for the Blind. RTA does not use any volunteers. RTA's travel training program budget was $855,334 in 2012.

Program Partners, Promotion, and Outreach

The primary partners with RTA's travel training program are the CTA, Pace, and Metra. RTA also has a contractual agreement with the Chicago Lighthouse for the Blind that provides travel training for visually impaired riders. The RTA also has contacts with more than 500 social services and human services organizations.

Results

The primary benefits for the riders are more flexibility and the ability to come and go when they want to travel. Also, RTA has found that, in general, the more the riders use fixed route transit, the more they are comfortable with it. The RTA staff has designed a travel log to determine use of ADA and non-ADA services. The basic result has been that travel training saved ADA paratransit costs but how many ADA paratransit trips have been saved is yet to be determined.

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

Funding for expansion is always a challenge. 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

RTA offered three recommendations for new programs: (1) The use of trainers with a social services background is helpful. (2) Emphasize the safety aspects of using fixed route transit services. (3) Study other programs and collect peer-to-peer information before beginning a new travel training program.

NJTIP @ RUTGERS
RUTGERS, THE STATE UNIVERSITY OF NEW JERSEY
NEW BRUNSWICK, NEW JERSEY

Program Name	**NJTIP@ Rutgers**
Sponsoring Organization	Alan M. Voorhees Transportation Center, Edward J. Bloustein School of Planning and Public Policy, Rutgers, The State University of New Jersey
Address	33 Livingston Avenue
City, State	New Brunswick, NJ
Organization Type	State university program
Training Program Began	2007
Service Area	Bergen, Essex, Hudson, Morris, Passaic, Somerset, and Union Counties
Service Area Population	4,176,796
Service Area Size (sq mi)	1,469
Data for Year Ending	2012
Annual Training Expenses	$550,000
Major Funding Sources	NJ TRANSIT (for seven counties), New Freedom (for three counties)
Partnering Agencies	NJ TRANSIT and local sponsors
Key or Unique Factors	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 percent 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.

Background

NJTIP, Inc. was formed in 2007 as a private nonprofit organization specifically to offer travel instruction in New Jersey. The mission of NJTIP 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 became part of the Alan M. Voorhees Transportation Center in the Bloustein School of Planning and Public Policy at Rutgers and became NJTIP @ Rutgers.

Program Start-up

Small and Associates, Inc. managed a pilot travel training program funded by New Jersey Transit (NJ TRANSIT) from 2005 to 2007. 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 systems work, which Small and Associates reported was the key to the development and successful implementation of NJTIP. The Kennedy Center's 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" (Small and Associates, 2007,

page 2). Fifty-eight customers started travel instruction and 49 (84 percent) 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 into the fixed route system. Seniors constituted 18 percent of the individuals with disabilities who participated in the pilot program. The founding director of NJTIP indicated that many of the potential senior participants were too frail to be eligible for travel training. The cost of the just over 2-year pilot program was $350,843. Once the program matured, the cost per customer contact hour was approximately $72. According to the founding director, the two biggest obstacles to training senior participants were finding host sites interested in participating in group training and convincing older adults that fixed route service is a valid alternative to automobiles.

Program Operations

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; and
- Public and private in-school travel training classes, which 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. NJTIP one-on-one training participants receive the following:

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

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 percent, or about $82,500, of that total funding is dedicated to seniors. One NJTIP trainer works with seniors, and provides group training, group orientations, and one-on-one training as needed. NJTIP does not use volunteers.

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 NJTIP Board of Directors includes representatives from some of the partnering organizations. Everyone at NJTIP markets the program even though one staff person conducts all trainings with older adults.

Results

Detailed information on results was available for the one-on-one training program results, 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). Follow-up calls focus on using public transportation, problems identified, any need for retraining, and additional support needed. These calls helped determine that 75 percent of graduates continued to travel by fixed route buses and trains in the year after graduation. A 2011 study of the NJTIP program was conducted by NJ TRANSIT. The study concluded that NJTIP increased NJ TRANSIT's fare box revenue and resulted in savings in Access Link costs for a total of $234,000

annually. NJTIP thus covered its expenses and had a positive return of 17 percent. NJTIP increased transit ridership by over 62,000 trips in 2011.

Reasons for Success and Potential Challenges

The NJTIP 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 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. 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. 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 the Voorhees Center to be an asset. 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.

Program Replicability

The NJTIP program is evidence of the ability to replicate a program and customize it for the needs of the communities that it serves. NJTIP staff members strongly recommend that seniors be involved in the development of programs. 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 for large groups. A second person can focus on marketing and one-on-one training. They also recommend that group training be conducted between 10 a.m. and 2 p.m. since buses are less crowded at that time and it will be less stressful for the participants. Travel trainers need to be enthusiastic about public transportation and use it themselves for a program to be effective.

RIDEWISE
RIDE CONNECTION
PORTLAND, OREGON

Program Name	RideWise
Sponsoring Organization	Ride Connection
Address	847 NE 19th, Suite 200
City, State	Portland, OR
Organization Type	Private nonprofit corporation
Training Program Began	2004
Service Area	Washington, Multnomah, and Clackamas Counties
Service Area Population	1,645,251
Service Area Size (Sq Mi)	3,075
Data for Year Ending	June 2012
Annual Training Expenses	$480,110
Major Funding Sources	FTA JARC program, TriMet, STF (state cigarette tax revenue)
Partnering Agencies	Public transit agency (TriMet) and multiple agencies and senior centers
Key or Unique Factors	Close relationship with public transit. Extensive follow-up. Person-centered social services model of mobility management.

Background

Ride Connection is a nonprofit community service organization founded in 1986 that offers transportation assistance to persons with disabilities and seniors without alternative transportation in a three-county area. The service area is both urban and rural; it incorporates Portland and surrounding suburban communities and includes 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. Ride Connection has developed partnerships with more than 30 separate agencies in the area, including adult and senior centers, mental health clinics, health care providers, and others.

Ride Connection started the RideWise program in 2004 as a result of needs identified by TriMet's internal review process. Ride Connection did a national survey of travel training programs that determined that the most successful programs were closely tailored to local community characteristics. Initial concerns were that the travel training program needed to

be seen as more than an offshoot of ADA paratransit services and that the expense of travel training needed to be offset by a clear demonstration of the benefits of the program.

The travel training program 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.

Program Operations

The RideWise program teaches older adults and people with disabilities to travel independently and safely on public transit and all 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. The services are provided at no charge for those who qualify.

Resources

The RideWise program has nine full-time positions. The program's annual budget is $480,110. RideWise Volunteers, designated as Ride Ambassadors, Transit Advocates, and Co-presenters, contributed 1,295.75 hours of service in FY 12 by providing expertise in leading group trips, committee work, and in support of the program's outreach efforts.

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.
- **Group travel 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 routes to and from the destination.
- **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.

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. All of Ride Connection's programs now conduct satisfaction surveys of participants 1 year after participating in a program.

Two hundred thirty-five individuals received one-on-one training in the 2012 fiscal year. Individuals who completed the entire one-on-one training process became successful independent travelers 92.6 percent of the time. Riders Club participants are provided evaluation cards to return at their convenience. First-time participants responding indicated a 67 percent likelihood of using transit for personal trips; the likelihood was 91 percent for participants that had been on two or more outings.

Reasons for Success

Ride Connection believes that a key to the success of its RideWise travel training program is creating a core philosophy and delivering a clear and consistent message to all members of the community. One component of this messaging is the focus on "building trust in the most respectful way," both with its travel training customers and with its partners; for example, treating all trainees as "customers," not "clients" or "students." The focus on individuals as customers is a key component of its 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 and his or her skill sets, other resources, and travel needs. Competent staff members who excel in customer service are critical to program success. A principal benefit is increasing the mobility of potential riders, and there are substantial benefits from allowing older adults to age in place and avoid the costs of nursing homes. RideWise staff describe travel training as "a game changer"—changing people from shut-ins to community members.

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 because RideWise is 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 its 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. TriMet considers travel training to be highly cost effective, and its spreadsheets could be used to calculate long-term benefits of the 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 RideWise had more resources, it would more actively knock on doors and use public service announcements. Another challenge is that,

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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.

Program Replicability

RideWise believes that its program could be replicated, although the staff 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 start-up recommendations include the following:

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 reinvent the wheel; celebrate uniqueness.

FREEDOM TO GO
RIVERSIDE TRANSIT AGENCY
RIVERSIDE, CALIFORNIA

Program Name	Freedom to Go
Sponsoring Organization	Riverside Transit Agency (RTA)
Address	1825 Third Street
City, State	Riverside, CA
Organization Type	Joint Powers Agency – Consolidated Transportation Service Agency
Training Program Began	2011
Service Area	Riverside County, CA (Western county cities and rural areas of the county)
Service Area Population	1,700,356
Service Area Size (Sq Mi)	2,725
Data for Year Ending	June 2012
Annual Training Expenses	$212,369
Major Funding Sources	FTA, JARC and New Freedom; Local Measure A (fuel tax)
Partnering Agencies	Social services agencies, senior centers, internal paratransit staff
Key or Unique Factors	Strong customer service, social services model, strong training team, proactive changes in services to remove barriers to travel

Background

RTA's Freedom to Go program is open to all older adults and persons with disabilities in 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. 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 to connect them to public transportation before they aged out of their driver's license and to reduce senior isolation, particularly in smaller communities and rural areas.

Program Operations

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.

- **One-on-one travel training for seniors** is provided to seniors who have completed the group travel training. Each senior from the group training who desires to learn more is scheduled for one-on-one travel training. This training covers route familiarization, how to read the RTA Ride Guide and system map, trip planning, and mobility device training. An individual travel training plan is prepared and training lasts as long as required for a senior to be able to travel independently. Refresher training may be conducted if requested.

- **One-on-one travel training for people with disabilities** was initially designed for those who are currently using or those who would become users of paratransit service. Training is offered to people who are registering for paratransit service before they use the service extensively. Training is tailored to each individual's needs, covering assessment of basic skills and the path of travel, as well as identification and evaluation of 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.

Intensive 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, or guardian for travel consent. Freedom to Go 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 trainee's hand on a stop signal; and gestures such as pointing, a nod of the head, eye contact, and role playing to help problem-solve an event that might happen.

Once these skills have been learned, the training focuses on monitoring progress on a declining basis (known as "fading") so that the trainer provides less instruction as the trainee acquires the needed independence; shadowing, where the trainer follows without being seen and the trainee completes the trip independently; and 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.

Resources

The Freedom to Go travel training program has three full-time travel trainers, one of whom is the travel training supervisor. Each trainer focuses on different segments of the population. One focuses on students with developmental dis-

abilities who are transitioning out of high school. A second, who is bilingual (English and Spanish), focuses broadly on people with disabilities who are using RTA's paratransit service. The third travel trainer, who is fluent in American Sign Language, focuses on older persons; all three have experience in social services program delivery.

Program Partners, Promotion, and Outreach

Key program partners are county agencies such as the Department of Rehabilitation, Department of Education, Inland Regional Center, senior centers, and adult day programs. Freedom to Go is promoted on RTA's website, with videos and brochures. Outreach is done by staff travel trainers.

Results

RTA began planning its travel training program in January 2010. The primary impetus then was to reduce the growth in paratransit trips. The program was established to train and encourage seniors and people with disabilities to learn to use fixed route service and to reduce dependency on paratransit service. 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 or awaiting training.

Reasons for Success

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.

Challenges

Potential challenges include demand for travel training services exceeding budget limits and looking for ways to leverage the resources to complete additional 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, including 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 electronic recording fare boxes. Customized reports are generated, tracking ridership associated with each individual pass, allowing trainers to monitor progress on a long-term basis. These 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

Program Name	Paratransit Mobility Training
Sponsoring Organization	Paratransit, Inc.
Address	2501 Florin Road
City, State	Sacramento, CA
Organization Type	Private nonprofit
Training Program Began	1981
Service Area	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
Service Area Population	1,418,788
Service Area Size (sq mi)	964.64
Persons Trained	12,030 since 1981
Data for Year Ending	2012
Persons Trained per Year	400
Annual Training Expenses	$534,429
Major Funding Sources	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 of their clients. Additional funding came from a New Freedom grant, a JARC grant, and from the South Area Transportation Management Association (TMA). Also, Paratransit, Inc., 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.
Partnering Agencies	ACRC, the California State Department of Rehabilitation, and the Sacramento Regional Transit District
Key or Unique Factors	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.

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 DOT 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 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.

Program Operations

Paratransit, Inc. serves Sacramento County and the 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. 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 in public transit vehicles while the vehicles are in service.

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

- 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.

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 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 per trainee, starting with the initial assessment through their final personal report.

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, including people with disabilities and older adults. The cost avoidance over the last 17 years in Sacramento has been estimated to be $20,588,458.

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; 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.

Results

To date, Paratransit, Inc.'s curriculum has brought independence, through travel training, to more than 12,000 transit users in the greater Sacramento area, including persons who are developmentally (intellectually) disabled, physically challenged, mentally disabled, and 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 disability 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 because driving is becoming less appropriate.

Reasons for Success and 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 Portland, Oregon (TriMet); Salt Lake City, Utah (Utah Transit Authority [UTA]); Baltimore, Maryland; Boulder, Colorado; Las Vegas, Nevada; Santa Cruz, California; Spokane, Washington; Stockton, California (San Joaquin RTD); San Jose, California (Santa Clara Valley Transit Authority); Honolulu, HI; Modesto, California (the Stanilaus County CTSA); and San Bernardino County, California (VTrans).

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.

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

Program Name	The Kennedy Center Senior Mobility Orientation, Travel Training, and Training & Professional Development for Transit Staff
Sponsoring Organization	The Kennedy Center, Inc.
Address	2440 Reservoir Ave
City, State	Trumbull, CT
Organization Type	Private nonprofit corporation
Training Program Began	2006
Service Area	State of Connecticut
Service Area Population	2,492,081, of which 709,854 are over age 60
Service Area Size (sq mi)	5,014 (Based on CT FY2014 Municipal Dial-a-Ride Funding Formula)
Data for Year Ending	July 2011 to June 2012
Annual Training Expenses	$55,000
Major Funding Sources	CTTRANSIT via a Grant from Connecticut DOT
Partnering Agencies	Transit agencies in urban and suburban transit districts in Connecticut
Key or Unique Factors	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.

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." TKC 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. In 2005, TKC 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 DOT, for additional funding to support a full-

time staff 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 its 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 was able to establish its credibility with the senior population and service providers. The TKC program is unique in the state of Connecticut in that it gets state funding to provide travel training and outreach to seniors.

Program Operations

TKC promotes three attributes of fixed route transit, emphasizing that fixed route transit fits seniors' lifestyle choices, fixed route can be appealing compared to ADA paratransit and taxis because it is less expensive and does not require a reservation, and cost savings can lead to more independence. The TKC program includes Senior Mobility Orientations and one-on-one training. TKC does many presentations (e.g., Senior Mobility Orientations) that can segue to one-on-one training. Group training can sometimes overcome obstacles to training 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 customized PowerPoint presentations that address 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. 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, not seniors. TKC staff estimated that, over time, 10 percent of their one-on-one travel training participants were seniors, but in the last full year (July 2011 to June 2012) TKC provided one-on-one training to six seniors, or about 3 percent of the individuals trained.

Resources

The funding for travel training for individuals with disabilities and for seniors is provided by a $434,632 mobility training grant from the 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 about $50,000, with operating costs adding an additional $5,000 per year. 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.

Program Components and Approaches

Senior Mobility Orientation and Training. 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. 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.

One-on-One Training. TKC conducts a pre-assessment of 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 his or her desired destinations. TKC staff members then prepare 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 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 he or she 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.

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. 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 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)."

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 presentation 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 percent), 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

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 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.

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.

Summary

These seven case studies document extensive and exemplary travel training programs. The seven programs demonstrate strong commitments to increasing the mobility of older adults and to providing significant benefits to transportation providers and their communities. Most of the programs focus their efforts on one-on-one training, and most of the programs feature substantial follow-up activities to ensure that the training has been effective in creating mobility improvements for older adults. All of the programs maintain close working relationships with local public transit agencies, and a number of the programs also have strong partnerships with other transportation providers. Some of these programs have worked together to build or improve their programs, and many of the programs have detailed procedural guidelines and guidebooks. These programs represent leaders in the field of travel training and they stand ready to assist others in developing and improving travel training programs for older adults.

Glossary of Technical Terms

Note: Terms shown in ***boldface and italics*** are defined in this glossary.

Key Transportation Concepts

Access: The opportunity to reach a given ***destination*** within a certain timeframe or without significant physical, social, or economic barriers.

Accessibility: The extent to which facilities, including transit vehicles, are barrier-free and can be used by all persons, including persons with disabilities and wheelchair users.

ADA: See Americans with Disabilities Act of 1990 in the "Federal Legislation and Programs" section of this Glossary.

American Public Transportation Association (APTA): **American Public Transportation Association** and its members and staff work to ensure that public transportation is available and accessible for all Americans in communities across the country.

APTA: See American Public Transportation Association.

ATI: See Association of Travel Instruction.

Association of Travel Instruction: An organization committed to the development of competent travel skills for people with disabilities and seniors so they can establish the independence to freely elect to use all modes of public transportation anywhere in the world.

Complementary Paratransit Service: Demand-responsive service that is operated in addition to ***fixed route*** service to accommodate persons who cannot ride the ***fixed route*** service because their disability prevents it. Under the ***Americans with Disabilities Act (ADA)***, public entities that operate ***fixed route*** service (excluding commuter service) are required to provide complementary paratransit with service characteristics equivalent to the ***fixed route*** service. The ***ADA*** is very specific in what constitutes equivalent service and what kinds of persons must be provided with this service. A plan describing the service and documenting the planning process must be submitted to the ***Federal Transit Administration*** regional office and updated annually.

Coordination: Coordination means pooling the transportation resources and activities of several agencies. The owners of transportation assets talk to each other to find ways to mutually benefit their agencies and their customers. Coordination models can range in scope from sharing information, to sharing equipment and facilities, to integrated scheduling and dispatching of services, to the provision of services by only one transportation provider (with other former providers now purchasing services). Coordination may involve human services agencies working with each other or with mass transit operations.

CTAA: Community Transportation Association of America.

Demand-Responsive Service: Service to individuals that is activated based on passenger requests. Usually passengers call the scheduler or dispatcher and request rides for particular dates and times. A trip is scheduled for that passenger, which may be canceled by the passenger. Usually involves curb-to-curb or ***door-to-door service***. Trips may be scheduled on an advanced reservation basis or in "real-time." Usually smaller vehicles are used to provide demand-responsive service. This type of service usually provides the highest level of service to the passenger but is the most expensive for the transit system to operate in terms of cost per trip.

Destination: A place at which a passenger ultimately disembarks from a vehicle; the point at which a trip terminates.

Dial-A-Ride Service: A name that is commonly used for demand-responsive service. It is helpful in marketing the service to the community, as the meaning of "dial-a-ride" may be more self-evident than ***demand-responsive*** to someone unfamiliar with transportation terms.

Door-to-Door Service: A service that picks up passengers at the door of their place of origin and delivers them to the door of their *destination*. The driver pulls the vehicle off the road if possible and may escort or physically assist the passenger if needed. Door-to-door service provides a higher level of assistance than curb-to-curb service and is typically used for passengers with severe physical disabilities.

Elderly and Handicapped (E&H): Anachronistic terminology for special transportation planning and services for persons with special needs; current *Federal Transit Administration (FTA)* terminology is persons with disabilities.

Environmental Analysis: The study of the environmental conditions along a path of travel that is done prior to initiating the teaching of any route to a person with a disability or a senior citizen. Considered in the environmental analysis are the essential features and conditions along the path of travel (e.g., presence/absence of curb ramps; timing of any pedestrian control signals and vehicular traffic signals; salient landmarks; availability and location of shelter and safe havens; types of intersections and traffic flow patterns for street crossing) that may hinder or facilitate a person's ability to travel. Using the results of this study of the environment, the travel training instructor/travel trainer can design an instructional plan and route that considers the individual's needs, the environmental conditions, and safety.

Fixed Route: Transportation service on a prescribed path or route that does not vary. The schedule may be fixed or flexible (such as jitney or shuttle service). Passengers may be required to wait at designated stops, or flag stops may be permitted. Usually, larger vehicles are used to provide fixed route service.

Fixed Schedule: Predetermined times at which a vehicle is to arrive at a certain location. The actual bus route may be fixed or flexible. A flexible route combines *fixed schedule* stops with *demand-responsive* stops (see checkpoint, point deviation, and route deviation).

Independent travel: Competent and self-reliant movement through the environment safely and efficiently.

Individuals with Disabilities: Any person who by reason of illness, injury, age, congenital malfunction, or other permanent or temporary incapacity or disability is unable, without special facilities, to use local transit facilities and services as effectively as persons who are not so affected. This definition is part of the *Americans with Disabilities Act (ADA)*.

Local Bus Service: Local bus service is a term used to describe a route along which many stops are made, allowing flexibility in where passengers may board and depart. It is typically used in contrast to express bus, a bus that makes a limited number of stops and is targeted more at long distance riders. Local bus service is important in rural areas unless feeder or connector service is available to bring people to the station.

Mobility: The ability to move or to be moved from place to place.

Mode: The means used to accomplish a *trip*, such as walking, traveling by automobile, traveling by bus, or traveling by train.

One-Way Trip: A one-way journey or movement of a person or vehicle between a specific *origin* and a specific *destination*.

Origin: A place at which a passenger boards a vehicle; the point at which a trip begins. Often this term is used to refer to a passenger's home, even though the home actually becomes the *destination* of a return trip.

Paratransit Service: Paratransit is a broad term that may be used to describe any means of shared ride transportation other than *fixed route* mass transit services. The term paratransit usually indicates that smaller vehicles (less than 25 passengers) are being used. These services usually serve the needs of persons that standard mass transit services would serve with difficulty. A paratransit service is typically advanced reservation, demand-responsive service provided curb-to-curb or *door-to-door*. Route deviation and point deviation are also considered paratransit. Paratransit is often more appropriate than *fixed route* services in rural areas and in areas with large populations of *elderly* or *persons with disabilities*. Paratransit services that are provided to accommodate passengers with disabilities who are unable to use *fixed route* service and who meet specific service equivalency tests are called *ADA complementary paratransit services*.

Person-Trip. A trip made by one person from one *origin* to one *destination.*

Round Trip: A *trip* from an *origin* to a *destination* and then back to the original origin. A trip from a person's home to his/her place of work and then back to his/her home is considered one round trip (and also is considered to be two one-way trips).

Service Route: Service routes are *transit* routes that are tailored to meet the needs of a specific market segment (such as *elderly* or *persons with disabilities*) in a community. Service routes often evolve out of a pattern of *demand-responsive* travel within a community. Characteristics of a service route include stops at high-density residential complexes or group homes, shopping areas, medical facilities, and *destinations* specific to the target population such as senior centers or sheltered work sites. Stops are usually positioned near an accessible entrance of a building instead of on the street, and the ride times are typically longer than on a "conventional" *fixed route* covering the same general area. Service routes may be operated instead of, or in conjunction with, a "conventional"

route in the same area. Vehicles tend to be smaller and accessible to persons with disabilities, and drivers usually offer a relatively high level of personal assistance. Service routes are used widely in Europe and are gaining greater popularity in the United States since the passage of the *Americans with Disabilities Act (ADA).*

Transit: Generally refers to passenger service provided to the general public along established routes, with fixed or variable schedules, at published fares. Related terms include public transit, mass transit, public transportation, urban transit, and *paratransit*.

Transit Dependent: Persons who must rely on public *transit* or *paratransit* services for most of their transportation. Typically refers to individuals without *access* to personal vehicles.

Transportation Disadvantaged: A term used to describe those persons who have little or no *access* to meaningful jobs, services, and recreation because a transportation system does not meet their needs. Often refers to those individuals who cannot drive a private automobile because of age, disability, or lack of resources.

Travel Environment: Essential features and conditions along the path of travel (e.g., presence/absence of curb ramps; timing of any pedestrian control signals and vehicular traffic signals; salient landmarks; availability and location of shelter and safe havens; types of intersections and traffic flow patterns for street crossing) that may hinder or facilitate a person's ability to travel.

Travel Time: Customarily calculated as the time it takes to travel from "*door-to-door.*" Used in transportation planning. In forecasting the demand for *transit* service, measures of travel time include time spent accessing, waiting, and transferring between vehicles, as well as that time spent on board.

Travel Instruction: The *Association of Travel Instruction* (*ATI*) considers travel instruction to be the professional activity of teaching individuals with disabilities and seniors how to *access* their environment and community and use public transportation independently. The practice of travel instruction as provided by a professional travel trainer requires knowledge of human development and behavior, travel-related concepts and skills, public transportation services, the natural and built environment, paths of travel, and the interaction of these dynamics. The Competencies for the Practice of Travel Instruction and Travel Training (Easter Seals Project ACTION) provides guidance to the competencies that are essential for the practitioner. Travel instruction practice as characterized by ATI includes the professional

application of a code of ethics, guiding principles, methods, strategies, and emerging best practices.

Travel instruction is the array, continuum, or family of services offered to individuals with disabilities, seniors, and others who need assistance to increase their mobility and travel on public transportation independently. It includes a variety of plans, methods, and strategies used by professional travel trainers to increase the independent travel skills of the people they serve. It is understood that individuals may require different travel instruction services during their lifetime as their needs change. Specific services included in the ATI definition of travel instruction are the following:

- **Transit Orientation:** Group or individual activity conducted for the purpose of explaining the transportation systems; options and services available to address individual transportation needs; use of maps and schedules as resources for trip planning; fare system; use of mobility devices while boarding, riding, and exiting; vehicular features; and benefits available.
- **Familiarization:** Individual or small group trip activity to facilitate use of transportation systems with a travel trainer accompanying experienced traveler(s) on a new mode of transportation or route to point out/explain features of *access* and usability.
- **Travel Training:** One-to-one short-term instruction provided to an individual who has previously traveled independently and needs additional training or support to use a different mode of travel, a different route, mode of transit, or travel to a new *destination*; or

    One-to-one comprehensive, specially designed instruction in the skills and behaviors necessary for independent travel on public transportation provided to an individual who does not have independent travel concepts or skills to go from point of *origin* of trip to *destination* and back.

Trip: A one-way journey or movement of a person or vehicle between a specific *origin* and a specific *destination*. For purposes of recording transportation services, trips are considered to be *one-way trips* unless otherwise specified. Trips may require using one or more travel *modes*, including walking and travel using different kinds of vehicles.

Volunteers: Volunteers are persons who offer services to others but do not accept monetary or material compensation for the services that they provide. In some volunteer programs, the volunteers are reimbursed for their out-of-pocket expenses; for example, volunteers who drive their own cars may receive reimbursement based on miles driven for the expenses that they are assumed to have incurred, such as gasoline, repair, and insurance expenses.

Federal Legislation and Programs

ADA: See Americans with Disabilities Act of 1990.

ADA Complementary Paratransit Service: Demand-responsive service that is operated in addition to *fixed route* service to accommodate persons who cannot ride the *fixed route* service because their disability prevents it. Under the *Americans with Disabilities Act (ADA)*, public entities that operate *fixed route* service (excluding commuter service) are required to provide complementary paratransit with service characteristics equivalent to the *fixed route* service. The *ADA* is very specific in what constitutes equivalent service and what kinds of persons must be provided this service. A plan describing the service, which documents the planning process, must be submitted to the appropriate *Federal Transit Administration* regional office and updated annually.

Administration on Aging (AoA): An agency in the *U.S. Department of Health and Human Services (DHHS)* that is the official federal agency dedicated to policy development, planning, and the delivery of supportive home and community-based services to older persons and their caregivers. The AoA administers the *Older Americans Act (OAA)* and works through the National Association of State Units on Aging, *Area Agencies on Aging (AAA)*, Tribal and Native organizations representing 300 American Indian and Alaska Native Tribal organizations, and two organizations serving Native Hawaiians, plus thousands of service providers, adult care centers, caregivers, and volunteers.

Americans with Disabilities Act of 1990 (ADA): A Federal law that requires public facilities, including transportation services, to be fully accessible for persons with disabilities. *ADA* also requires the provision of complementary or supplemental paratransit services in areas where *fixed route* transit service is operated. This act expands the definition of eligibility for accessible services to persons with mental disabilities, temporary disabilities, and the conditions related to substance abuse. The act is an augmentation to, but does not supersede, Section 504 of the Rehabilitation Act of 1973, which prohibits discrimination on the basis of disability against otherwise qualified individuals in programs receiving Federal assistance.

Area Agency on Aging (AAA): The local entity that plans senior services and advocates for the elderly within their communities, administering provisions of the *Older Americans Act* (*OAA*).

Federal Highway Administration (FHWA): The agency within the *U.S. Department of Transportation (DOT)* that administers federal-aid highway programs.

Federal Transit Administration (FTA): The agency within the *U.S. Department of Transportation (DOT)* that administers federal-aid transit programs.

Grant: The award of funds to an entity. Federal funds are typically awarded either as formula (or block) grants, in which a predetermined legislative process establishes the level of funding available to an entity, or discretionary grants, in which the funding agency is free to determine how much (if any) funding an entity will be given based on the relative merits of the proposal. Private foundations also give grants based on similar criteria.

Medicaid: Also known as Medical Assistance, this is a health care program for low-income and other medically needy persons. It is jointly funded by state and federal governments. The Medicaid program is administered by the Centers for Medicare and Medicaid Services, an agency that is part of the *U.S. Department of Health and Human Services*. Medicaid pays for transportation to non-emergency medical appointments only if the recipient has no other means of travel to medical services.

Metropolitan Planning Organization (MPO): The organizational entity designated by law with lead responsibility for developing transportation plans and programs for urbanized areas of 50,000 or more in population. MPOs are established by agreement of the governor and units of general purpose local government that together represent 75 percent of the affected population of an urbanized area.

Moving Ahead for Progress in the 21st Century Act (MAP-21): The Moving Ahead for Progress in the 21st Century Act (MAP-21) is a funding and authorization bill to govern U.S. federal surface transportation spending. It was passed by Congress and signed by President Obama in 2012. This 2-year bill replaced the SAFETEA-LU legislation; it did not significantly alter total funding from the previous authorization, but it included significant reforms, such as consolidating programs like FTA's Sections 5310, 5316, and 5317 programs.

National Household Travel Survey (NHTS): A periodic national survey, to assist transportation planners and policymakers who need comprehensive data on travel and transportation patterns in the United States.

Older Americans Act (OAA): Federal law first passed in 1965. The act established a network of services and programs for older people. This network provides supportive services, including transportation and nutrition services, and works with public and private agencies that serve the needs of older individuals.

Persons with Disabilities: Those persons who have a physical or mental impairment that substantially limits one or more major life activities, have a record of such impairment, or are regarded as having such an impairment.

Safe, Accountable, Flexible, Efficient Transportation Equity Act: A Legacy for Users (SAFETEA-LU): SAFETEA-LU was a funding and authorization bill that governed U.S.

federal surface transportation spending. It was signed into law by President George W. Bush on August 10, 2005. It initially expired on September 30, 2009, but Congress renewed its funding formulas 10 times after that expiration date. SAFETEA-LU was replaced with the Moving Ahead for Progress in the 21st Century Act in 2012.

Section 5310 Program: A *Federal Transit Administration* program, entitled Transportation for Elderly Persons and Persons with Disabilities, this program provides formula funding to states for the purpose of assisting private nonprofit groups in meeting the transportation needs of the elderly and persons with disabilities when the transportation service provided is unavailable, insufficient, or inappropriate for meeting these needs. Funds are apportioned based on each state's share of population for these groups of people. Funds are obligated based on the annual program of projects included in a statewide grant application.

Section 5311 Program: A *Federal Transit Administration* program, entitled The Formula Grants for Other than Urbanized Areas, is a rural program that is formula based and provides funding to states for the purpose of supporting public transportation in rural areas with populations of less than 50,000.

Section 5316 Program: A *Federal Transit Administration* program, entitled Job Access and Reverse Commute (JARC), provided funding for transportation services that provide job access and reverse commute trips. The JARC program was established to address the unique transportation challenges faced by welfare recipients and low-income persons seeking to obtain and maintain employment. Initially implemented as part of the TEA-21 legislation in 1998, important portions of the JARC program were modified by the SATETEA-LU legislation in 2005. Under the MAP-21 legislation, Section 5316 became a component of the Section 5310 program.

Section 5317 Program: A *Federal Transit Administration* program, known as the New Freedom program, provided funding for services to **persons with disabilities** beyond the scope of services required by **ADA.** This program was created by the SATETEA-LU legislation in 2005. Under the MAP-21 legislation, Section 5317 became a component of the Section 5310 program.

U.S. Department of Health and Human Services (DHHS): The federal department responsible for overseeing a wide variety of human services programs that protect the health of all citizens and providing essential human services. Specific programs include those administered through **AoA**, Head Start, **Medicaid**, and other agencies.

U.S. Department of Transportation (DOT): The federal department responsible for overseeing a wide variety of federal funds and regulations for transportation facilities and programs. U.S. DOT includes **FHWA** and **FTA**.

Urbanized Area (UZA): An area that contains a city of 50,000 or more population, plus incorporated surrounding areas, and meets set size or density criteria.

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Gray, B. H. (Ed.). *Urban Public Transportation Glossary.* TRB, National Research Council, Washington, D.C. (1989).

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APPENDIX A

List of Information Sources

1. Contact Information for Seven In-Depth Case Study Sites

Boulder, Colorado
Via Mobility Services Travel Training
Susan Unger
Travel Training Coordinator
2855 North 63rd Street
Boulder, CO 80301
Phone: 303-447-2848 Ext. 1048
sunger@viacolorado.org

Chicago, Illinois
Regional Transportation Authority
Michael VanDekreke, LCSW
Manager, Accessibility, Customer Service Department
Regional Transportation Authority
175 W. Jackson Blvd # 1650
Chicago, IL 60604
Phone: 312-913-3204
vandekrekem@rtachicago.org

New Brunswick, New Jersey
NJTIP @ Rutgers
Karen J. Alexander, MPA
Managing Director, NJTIP @ Rutgers
Alan M. Voorhees Transportation Center
Rutgers, The State University of New Jersey
33 Livingston Avenue
New Brunswick, New Jersey 08901
Phone: 848-932-2831
karen.alexander@njtip.rutgers.edu

Portland, Oregon
Ride Connection
Mike Mullins
Mobility Manager
Ride Connection

847 NE 19th, Suite 200
Portland, OR 97232
Phone: 503-528-1743
Fax: 503-528-1755
mmullins@rideconnection.org

Riverside, California
Riverside Transit Agency
Virginia Werly
Director of Contract Operations
Riverside Transit Agency
1825 Third Street
Riverside, CA 92507
Phone: 951-565-5184
vwerly@riversidetransit.com

Sacramento, California
Paratransit, Inc.
J. D. Culver
Mobility Options Manager
Paratransit, Inc.
2501 Florin Road
PO BOX 231100
Sacramento, CA. 95823
Phone: 916-429-2009 Ext. 7719
or (916) 868-6218
jd@paratransit.org

Trumbull, Connecticut
The Kennedy Center, Inc.
Jonathan Rubell
Mobility Services Director
The Kennedy Center, Inc.
2440 Reservoir Ave
Trumbull, CT 06611
Phone: 203-365-8522 Ext. 265
JRubell@kennedyctr.org

2. Additional Contact Information

Dr. Minnie Fells Johnson (TCRP Project B-41 Panel Member)
Consultant
5860 SW 8th Street
Plantation, FL 33317
Phone: 937/623-4236
Email: doctormfj@hotmail.com

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NJ TRANSIT. *NJTIP Graduate Survey.* Newark, NJ: NJ TRANSIT (2012).

Small and Associates, Inc. *NJTIP-The New Jersey Travel Independence Program: Pilot Program Final Report*, page 2. Livingston, NJ: Small and Associates. (2007).

The Kennedy Center, Inc. *Travel Training Guide, Fifth Edition.* Trumbull, CT: The Kennedy Center, Inc. (2012).

4. Notable Travel Training Handbooks

The Kennedy Center, Ride Connection, and Paratransit, Inc. had exemplary travel training handbooks. These Handbooks may be for sale by the respective programs. If interested, please use the contact information provided in Section 1 of this Appendix.

Each of the handbooks gave detailed instruction on what should be included in travel training. Some of the topics that should be included in a travel training handbook include the following:

- Overview of the program
- Code of ethics
  - Confidentiality
  - Setting boundaries
- Travel training referral and interview
  - Receiving referrals
  - Initial interview
  - Assessing mobility and pre-mobility skills
- Training techniques
  - Planning
  - Training methods
  - Training sequence model
  - Finding a lost trainee
- Travel environment
  - Landmarks
  - Signage
  - Trip/route planning
  - Learning bus numbers
- Barrier analysis
  - Environmental barriers
  - Social barriers
  - Physical barriers
- Disaster preparedness
  - Environmental emergencies
  - Medical emergencies
- Disability etiquette
- Ongoing evaluation

Travel Training Guide—The Kennedy Center, Inc. (Trumbull, Connecticut)

Table of Contents—Chapters

16. Expect the unexpected
17. Follow-up
18. Rail
19. Sample forms

Travel Training Handbook—Paratransit, Inc. (Sacramento, California)

Table of Contents—Chapters

1. Welcome and introduction
2. Training prerequisites
3. Definition of a common wheelchair
4. Trainee objectives
5. Confidentiality
6. Responsibilities
7. How to assess mobility and pre-mobility skills
8. Training techniques
9. Using training techniques
10. Planning
11. Training methods
12. Training sequence model
13. Finding lost trainees
14. Objectives for using bus schedules
15. Calling the bus information telephone line
16. Trip/route planning
17. Instructions for emergencies
18. Disaster preparedness for mobility trainees
19. Learning bus numbers
20. Trainee evaluation checklist
21. Example checklist
22. Cell phone use
23. Mobility trainer survival kits
24. "Knowing your rights!"
25. Disability etiquette
26. Working with the older trainee
27. Training people who have psychological disorders
28. Working with individuals who have experienced a traumatic brain injury
29. Sighted guide techniques
30. Mandatory reporting abuse of vulnerable adults
31. Training in a classroom setting
32. Outreach activities
33. Mobility training presentation outline
34. Community fair and outreach materials
35. The Association of Travel Instruction (ATI)
36. Association of Travel Instruction code of ethics

A Guide to Travel Training—RideWise (Ride Connection, Portland, Oregon)

Table of Contents—Chapters

1. Description of the program elements
2. Code of ethics
3. Emotions and traveling independently
4. Developing the natural support system
5. Travel training referral and interview
6. Travel skill identification
7. How we travel in our environment
8. The environment barrier analysis
9. The importance of safety in independent travel
10. Field training
11. Ongoing evaluation
12. Disability labels
13. The ADA—rights and responsibilities

APPENDIX B

Suggested Contents for Travel Training Program Forms

Forms are important to ensure that travel trainers have correct and complete information on prospective trainees, their capabilities, the environment in which they will be traveling, and to provide post-training follow-up to ensure continuing travel. This information establishes the baseline for successful training that will endure. The following forms and the areas of information within each of them represent the core forms that are necessary.

Training Referral

- Trainee contact information
- Referral source information
- Reason for referral
- Potential destination and days and times of travel
- Disabilities and special considerations
- Current methods of transportation

Initial Travel Trainee Interview or Assessment— Recommended Content

- Contact Information: name, address, phone, email, form of ID
- Contact: individual, parent primary care provider, guardian
- Emergency contact information
- Background—current travel interests, prior bus use
- Cognitive recognition, communication, physical/medical condition, vision, mental health, hearing, coping skills, natural support system, safety, navigation
- Physical Outing Assessment—safety assessment, demonstrated physical capabilities, barriers that impede travel
- Travel skills assessment
- Logistics for Training Appointment
- Trainer Recommendations

Environmental or Path of Travel Assessment
(natural and built environment)

- Going from origin to the bus stop and back to origin
- At the bus stop
- On the vehicle
- Going from bus stop to destination and back again
- Additional issues
- Recommendations to improve the path of travel

Follow-up Evaluation (1 month, 3 months, 6 months, 1 year, multi-year)

- Contact information
- Date of follow-up and name of trainer completing follow-up
- Current fixed route riding—same/different level of riding, new destinations, reason for change
- Problems encountered, changes in travel capabilities, need for refresher training
- Assessment and recommendations

Other forms that some travel training programs have found useful include these:

- Job descriptions of key travel training personnel
  – Travel trainers (instructors)
  – Travel training program supervisor
  – Outreach staff, coordinators, specialists
  – Others
- Travel training program Code of Ethics
- Procedures for assignment to a specific form of travel training
- Pre-training goals agreement
- Responsibilities agreement and liability waiver (Consent form)
- Training program trip log
- Follow-up surveys
- Annual or other periodic reports

Abbreviations and acronyms used without definitions in TRB publications:

A4A	Airlines for America
AAAE	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
HMCRP	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