

TRANSPORTATION RESEARCH BOARD  
OF THE NATIONAL ACADEMIES

# Travel Training

*for Older Adults*

## Executive Summary

*by Jon E. Burkhardt*

Executive Summary of TCRP Report 168  
Transit Cooperative Research Program



# THE PROMISE OF TRAVEL TRAINING

Mobility is essential for independent living. We need transportation to work, shop, get medical care, worship, enjoy educational and recreational opportunities, or see friends and relatives. To reach these often geographically dispersed destinations, most of us drive a car or ride in someone else's car.

From time to time, even people who have regular and reliable use of a car will need other options to fulfill their transportation 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 when they are not able to drive or have someone else drive for them. Travel training can help someone start using public transportation or other modes and use those modes more effectively. While clearly not “the only answer” for the travel needs of all older people and all communities, travel training is a potent tool in the arsenal of strategies for improving or maintaining mobility for older adults.

## The Benefits of This Project

The Travel Training for Older Adults project provides tools for making travel training more effective in meeting the mobility needs of older people. Transit agencies and human services providers will find information about how to create, implement, sustain, and evaluate a travel training program for older adults so they can use fixed route public transit services or other modes of travel.

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 people, which new components to add, who are the most likely target groups for such programs, and what are the best ways to conduct outreach to those target groups. This project's Travel Training Handbook helps meet those needs by describing these essential elements:

- The fundamentals of travel training programs, including 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 potential longer-term benefits.
- Potential challenges to travel training programs, including items such as funding, staffing, and perceptions or concerns of potential riders and their advocates.

**TCRP Report 168: Travel Training for Older Adults, Part I: A Handbook** is a manual for transportation, social service, aging, and training professionals that describes successful travel training practices and how to implement these practices in various community situations. The Handbook is intended as a resource for professionals who manage and deliver travel training services and for anyone else interested in enhancing mobility options for older adults. The Handbook will be useful to transportation program staff who work with seniors and people with disabilities, to people who provide elder housing and operate senior centers, and to any others who work with older adults and want to support individual independence and mobility through safe and effective use of transportation alternatives. **TCRP Report 168: Travel Training for Older Adults, Part II: Research Report and Case Studies** describes how the findings for this project were developed.

This report builds upon both previous research and new research focusing on case studies of current travel training programs for older adults. Twenty travel training programs across the United States were selected for study because data were available from various sources suggesting that they could provide important information on how to create, sustain, and evaluate travel training programs for older adults and that they would cooperate with this research effort. In-depth and on-site data were collected for seven travel training programs deemed to have highly developed and successful programs. Information from another 13 sites was collected with extensive interviews and follow-up activities but without site visits.

## Why Get Involved with Travel Training?

Travel training for older adults creates substantial benefits for individuals and organizations, and these benefits are significantly larger than the costs. In fact, the list of benefits is long and extensive. Individual travelers can realize increased mobility and independence. Public transportation providers, many of whom face severe resource constraints, can expect financial benefits. A large number of individuals could use travel training, and this number is expected to grow dramatically in the near future.

---

The population of oldest adults (85 years of age and older) in the United States will increase from about 5 million in 2011 (1.6 percent of the population) to about 18 million (4.5 percent of the population) in 2050. **These projections suggest that concerns about the mobility of older adults could be even greater in the future.**

---

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

- **Increased tripmaking**, both short term and long term, leading to enhanced mobility and independence.
- **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, reduced isolation, 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**, such as lower costs for riders and avoiding the costs of nursing homes.



The benefits to the transit providers can also be quite substantial, as follows:

- There can be **substantial cost savings to the transit agency** or cost avoidance for 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).
- Travel training programs typically create **more capacity on paratransit vehicles** for riders who have no other travel options than the paratransit services.
- Travel training **generates good will** among transit's funders with its emphasis on cost control and among transit's consumers with its efforts to improve their mobility.

Benefits like these are likely to have even more relevance in the future. Census Bureau projections indicate that the number of adults age 65 and older will grow from about 40 million in 2011 (13 percent of the population) to about 87 million in 2050 (about 21 percent of the population). Increases in life expectancy mean that this growth in the older adult population will be even more dramatic for people age 85 and older. The population of oldest adults (85 years of age and older) in the United States will increase from about 5 million in 2011 (1.6 percent of the population) to about 18 million (4.5 percent of the population) in 2050. These projections suggest that concerns about the mobility of older adults could be even greater in the future.



## What Are the Key Features of Successful Programs?

Most programs, including travel training programs, can be described by their components. A typical program description would include the following components:

- Program focus.
- Program development.
- Partnership development.
- Staff.
- Program operations.
- Outreach.
- Monitoring and evaluation.

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

- **Hiring travel training staff based on personal qualifications** (like compassion and understanding the value of travel training), social service experience, and depth of experience. “People skills” are most important.
- **Tailoring training to individual needs and capabilities.**
- **Focusing on customer service.**
- **Obtaining sustainable funding.**
- **Partnering with key community stakeholders.**
- **Continually monitoring and analyzing program impacts.** Fully documenting expenses. Following up over time to document results and to offer more training if needed. Developing a performance measurement system to evaluate program success. Documenting results in both quantitative and qualitative terms with regular program reports.
- **Integrating travel training into agency marketing and branding efforts;** marketing the program through educational outreach or through program partners.

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.



For older adults, age-related changes to vision or physical and cognitive skills can create concerns about fulfilling their transportation needs, but they still need to travel to lead vital and independent lives. As people age into older adulthood, they are more likely to experience health conditions that can make safe driving more difficult. Our society is oriented toward the use of automobiles by people of all ages, including older adults, for satisfying their mobility needs. Personal transportation is closely linked to the automobile due, in part, to suburbanization, changing family structures, increased vehicle affordability and availability, and a lack of alternative transportation options. 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 drive or choose not to drive maintain mobility and quality of life.

Key components and activities of travel training will be strengthened and enhanced by the following suggestions:

### **Hire Professional, Well-Trained Staff**

The travel training program should be staffed with professionals who understand a social service model of program delivery and who understand the travel needs of older adults. Trainers must be able to connect with trainees. Personal traits of trainers such as empathy, likability, respect, patience, and kindness are central to this ability. The focus on customers as individuals is a key component, 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, his or her unique skill sets and other resources, travel needs, and cultural background and needs. Trainer credibility is enhanced when the trainer regularly uses fixed route services. Trainers must be flexible, resilient, and calm, as they encounter unexpected changes in the real-world training environment. A competent staff that excels in customer service is a key to program success.

### **Emphasize Individual Abilities and Learning Patterns**

Effective travel training has a strong individual focus. Keys to effective travel training include keeping safety as the foremost concern; being sensitive to learning needs, styles, and patterns; involving the consumer in his or her own travel training program; keeping the training steps short and simple; taking cues from the trainee as to the speed and conditions of training; turning what may be negative occurrences in public transit travel into positive travel training learning experiences; being patient; keeping a sense of humor; and making the learning process fun.

Travel training curricula should be developed and organized to serve the diversity of travel training needs present among older adults. Curricula need to encompass individual, group, and follow-up or refresher training. In some circumstances, group training may be sufficient, but some older adults are likely to require individualized training, tailored to their capabilities, experience, environment, and the trip destinations they need to reach. Some trainees may require help in establishing new routes or periodic re-training. Such training is essential for older adults to continue to benefit from the use of fixed route or paratransit service, as services or personal capabilities may change.

### **Focus on Customer Service and Customer Benefits**

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 element should be a social service 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.

### **Obtain Stable and Sustainable Funding**

A well-developed travel training program will incur expenses for staffing, materials, facilities, and general operating support. Expenses should be tied closely to local needs and resources; annual expenses can range from less than \$50,000 for small programs to more than \$800,000 for large programs with large numbers of trainees. Sustainable funding is critical for maintaining continuing program viability. A strong travel training program will achieve savings in paratransit service costs by increased use of fixed route service. Additional farebox revenues will accrue to public







transit systems from older adults who never used paratransit service but who now ride fixed route service. Sustainable travel training programs generate a financial benefit that exceeds their cost; it is important to emphasize this result to potential funding partners.

### Create Strong Program Partners That Include Public Transit Systems

The organization that sponsors the travel training program will find that program partners are essential to success. If the travel training program is set up in an organization other than the local public transportation operator, the local public transit system or systems should definitely be included as key partners. Whether the travel training program operates inside or outside a public transit system, program partners should also include human service agencies that provide services to older adults, organizations that advocate for older adults, and sponsors of places where older adults gather. Strong partners can assist in encouraging volunteers who can help make significant reductions in a program's costs.

### Monitor the Results of Travel Training

Measuring results is important for many reasons, including documenting the benefits that older adults achieve. Benefits can be measured in a number of ways. Surveys of travel

trainees typically measure benefits of training immediately upon completion of training and at 3-, 6-, 9- and 12-month intervals; additional follow-up in later years is recommended. 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.

Outcome measures should focus on measuring individual results and overall program results. Measuring individual results shows the direct benefits to trainees. Program results should measure aggregate benefits to older adult trainees and measure the effectiveness of the program overall, including cost savings for public transportation and other providers. Demonstrated cost savings are likely to be critical to obtaining sustainable funding for the travel training program and to document individual results and overall program results.

### Integrate Travel Training into Community Outreach and Education Efforts

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 begin 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.

## What Challenges Can Travel Training Programs Face?

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 issues:

### Maintaining consistent program funding streams

can be the biggest challenge travel training programs face. Funding for travel training is not ensured; a lack of stable funding may limit the full potential of any travel training program. Funding issues can be complicated due to the variety of travel training operating models, differences between states, and changes in the federal program structure. 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.

At this time in 2014, 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 decrease rapidly escalating paratransit costs. Also, new federal transportation legislation (Moving Ahead for Progress in the 21st Century Act, known as MAP-21) changes previous funding patterns for travel training. Operating successful programs in the face of these uncertainties will be a challenge.

**The nature of travel training programs** may in itself be challenging. These programs involve equipping individuals to explore, use, and then thrive in environments that they may consider to be new, foreign, or even threatening. These perceptions can be overcome through training, but initial perceptions may discourage some older adults from even entering a travel training program. Travel training programs may incur costs first, but some of the benefits, including cost savings, won't accrue until months or even years later. 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, meaning that there are some limitations on who can benefit from travel training.

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

- The frequently negative media culture surrounding the use of public transit. For example, transit safety seems to be reported as a much greater problem than it actually is. This negative reporting restricts interest in using public transit, which can diminish participation in travel training programs. Developing positive media outlets targeted to older adults is critical.
- Difficulties in identifying a continuing stream of trainees. Older people who need transportation do not necessarily live in senior housing, and they might not be active in senior center programs.
- The natural reluctance 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.
- Some older people may be reluctant to attend travel training programs at times when travel may be more difficult, such as during periods of extreme cold or heat.
- Limitations in funding and staffing. These limitations may constrain the amount of outreach that is possible.
- The persistence needed to ensure that seniors, 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 between transit agencies and 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.

**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. Obstacles in the travel environment (broken sidewalks, no street lights, and other problems) can be challenging for many potential trainees.

## Improved Travel Training Practices

As a profession, travel training is relatively new. The vast majority of its practitioners are highly dedicated, resourceful, hardworking, and sensitive to individual needs. With some of the basic procedures and practices now established, the industry needs to focus its attention on better measuring its costs, benefits, and successes, and then transmitting that information to its sponsors and other stakeholders. In particular, the following activities will be undertaken by the most cost-effective travel training programs:

- **Create and use common definitions of all training activities and their results.**
- **Document all costs and benefits.** Collect these data for each training component (such as one-on-one training and group training) and report that information to program participants, family members and caregivers, funding partners, and the community.
- **Analyze costs and benefits to improve program cost effectiveness.**
- **Implement processes to translate customer feedback into program improvements.**
- **Find ways to make better use of volunteers.**
- **Broaden the depth and breadth of funding commitments.**
- **Use training program data to help transit providers improve their services to older adults and others.**

Strategies to accomplish these objectives might include the following:

- **Develop more precise statements of mission, goals, and objectives.** Focus the goals and objectives on reasonable expectations of outputs and outcomes of training activities.
- **Adopt and apply industrywide standards for instructional activities for all travel training programs.**
- **Adopt and apply industrywide standards of fully allocated cost accounting principles and performance measures for all travel training programs.**

- **Enhance monitoring and follow-up activities.** Follow training program graduates for more than one year to better assess the long-term impacts of training. Collect information on the differences that travel training made in the lives of all of their participants, 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.
- **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.

## SUMMARY

Mobility is essential because of the opportunities it unlocks. Travel training can improve mobility of older adults and lead to increased capabilities for active, connected, independent, and vital lives.

Copies of all products of this project are available in PDF format online at <http://www.tcrponline.org> or <http://www.trb.org> by searching for TCRP Report 168.

This work was sponsored by the Federal Transit Administration (FTA) and was prepared by Westat for the Transit Cooperative Research Program, which is administered by the Transportation Research Board of the National Academies. Jon E. Burkhardt was the Project Director and Principal Investigator for this research effort; other key authors included David J. Bernstein and Kathryn Kulbicki of Westat, David W. Eby and Lisa J. Molnar of the University of Michigan Transportation Research Institute, Charles A. Nelson of Nelson Development Ltd., and James J. McLary of McLary Management. Kristi O'Donnell of Westat provided the graphics for this presentation.