

## **Post Conference Workshop**

**Friday November 30, 2007**

### **ITN America: A Unique Model for Seniors' Transportation**

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#### **The Vision:**

An efficient and financially sustainable solution to the transportation needs of seniors and their families that will scale with the aging of the population.

- Consumer oriented – market based
- Technology driven – efficient, replicable, connected. Technology makes systems efficient and helps connect people in communities
- Community based – non-profit, volunteer

*(scale = grow proportionately with the need. Important to recognize that it is not only a senior issue, but also a family issue.)*

#### **Characteristics of an ITN Affiliate**

- Uses automobiles to provide rides 24 hours a day, 7 days a week;
- Availability for any purpose, without restriction to all ITN members;
- Sustainable through fares from those who use the service and voluntary local community support, without the use of taxpayer dollars;
- Connected to and served by ITN Rides information system technology;
- Serves seniors 60 years of age or older and people with visual impairments of any age. *(Eventually they hope to be available to everyone.)*

*Karen emphasized how they move the meaning – then people will let go of the object (their car). Make a safer alternative to people that is user friendly and timely – then people will give up their need to drive voluntarily.*

*The car and road around them is seen as “personal turf”, therefore we need to provide personal space in a vehicle not owned by them.*

*Customer Education is an important piece of the pie.*

#### **How ITN Works – Organization**

- independent, non-profit, charitable corporation connected to and supported by the local community
- Membership organization – members age 60+ or with visual impairments may use the transportation service. *(Both voting and nonvoting members)*
- Older people, volunteers, families, businesses, healthcare providers, corporations connected to the ITN affiliate through revenue generating programs. *(Connected both financially and by social purpose.)*
- Information system, ITNRides, links people within a community and across communities – local, state, national (and possibly internationally?)

*ITN encourages people to remain active in the community: either from their car to ITN, or off their couch to ITN.*

*Designed to provide a new form of transportation; not to replace public transit or disabled transportation systems. It focuses on the missing piece.*

*Drivers (Paid and Volunteer) are trained to provide the ride and assistance (assistance is not seen as an extra)- customer service, safety, it is their service too (sense of belonging). Drivers do not take tips. Boundaries – drivers are not social workers; when issues arise clients are referred to appropriate professional*

*People feel vulnerable taking taxis. Initially some resistance from taxi services; however it seems they serve different clients.*

*Over 10% of users take wheelchairs. (Driver's trunk capacity kept track of on the software.) They must be able to transfer. They do not have wheelchair lift vehicles. They will transport an assistant with no extra charge.*

*Mean age is 82 years, 80% women, 70-80% living alone in the community (these statistics seem to be the same internationally – Ireland, Australia)*

### **How ITN Works – Finance**

- Resources take many forms and are converted to transportation through the business model and the technology
  - Car Trade, car donation (*car value depreciates & costs / mile increase as we age, therefore it makes good sense to trade car/donate car for rides*)
  - Transportation Social Security (*volunteers get credits for driving-they can keep them for when they will need the service or donate them*)
  - Road Scholarship Fund (*for lower income people – no confirmation of income is required, they don't have a sliding scale, offer this when the organization has credits available*)
  - Gift Certificates
  - Cash
  - Ride & Shop, Healthy Miles, Ride Services (*contract with an organization for rides, information kept on software*)
- Customer service and free consumer choice are paramount – rides 24/7 without restriction within the service area
- Political jurisdictions may not apply
- Sustainable through fares and voluntary local community support (*well off members are approached annually for donations, as are community organizations*)
- No taxpayer subsidy for operating expenses
- Must use automobiles – no vans or buses
- Up to 50% of start-up funds may be public funding (100% private funds by year 5)
- Combination of paid and volunteer drivers

*People prepay to an account before they receive rides (they have set a minimum prepay of \$25)*

*Each affiliate sets their own "over run" limit (\$50-\$200)*

*Customers receive a "statement of transportation account" (as opposed to a "bill").*

*Donated cars: some kept for driving, others are traded in. Paid drivers drive the ITN owned cars, Volunteers drive their own cars.*

*Use of Volunteer and Paid Drivers:*

- *volunteer programs only meet the needs of a small band of people, as do fully paid services. ITN brought these two together.*
- *to manage capacity: no capital expenses, ensure minimal # of vehicles, expand capacity with volunteers at peak times, insures only the smallest fleet necessary*
- *In this way a service can be provided lower than market value, at efficiency of mass transit.*
- *Relationships between paid and volunteer drivers needs to be managed.*
- *Paid drivers – minimum wage jobs / part-time.*

*If a customer/volunteer moves from a community with ITN to another affiliate community with ITN, accounts are transferable. They can take their "membership assets" with them. (Affiliates must agree to reciprocity agreement.)*

*Boundary / Service Area: is defined by the community. It is important to start within a reasonable area, with an expansion area in mind. Boundaries should not be based on jurisdictional boundaries – rather functional boundaries.*

*They have found that people are more willing to pay for a ride in a car vs a van.*

*Volunteers are reimbursed for mileage.*

*If customer is using labor (for personal assistance) the client pays for this service.*

*Affiliation agreements:*

- *defines service area*
- *start small*
- *with an expansion area in mind*
- *mission driven, therefore if another community wants to take up a portion of the service, if your organization can't expand to meet the need, they must relinquish that area from the originally proposed expansion area.*

### **How do seniors use ITN?**

- Join
- Open an account
- Ride

*From the perspective of the senior / consumer the service must work simply.*

*\*\*Paramount to have a simple service.*

*Technology is complex, but the service is simple.*

*The service provider “eats” the complexity.*

*Clients receive newsletter, birthday cards, and invitations to events.*

### **ITN Consumer Choices about How to Ride**

- Plan rides in advance or ride on demand (*consumer incentive – schedule ride by a predesignated time they get a break on the cost*)
- Ride alone or share rides with others (*software remembers if customer is willing to share a ride*)
- Ride by the hour or by the mile

### **Fares Seniors Pay**

- Pick up charge + mileage charge
- Minimum charge is \$6
- 15% discount for rideshare
- %50 discount for advance planning

*Average ride = \$10 one way*

*Median cost = \$5*

*A lot of short trips.*

*People more willing to pay for a ride in a car vs a van.*

*If using labor (for personal assistance, user pays.)*

### **Volunteerism and Sustainability**

- **ITN Portland (Oct 06 thru March 07)**
  - Total rides 8,716
  - Paid rides 6,462
  - Volunteer rides 2,254 (25.9%)  
(*population: 64,000 proper, 190,000 greater*)
- **ITN Charleston Trident (Dec 06 thru March 07)**

- Total rides 707
- Paid rides 224
- Volunteer rides 483 (68.3%)
- **ITN Orlando (Nov 06 thru March 07)**
  - Total rides 1,046
  - Paid rides 624
  - Volunteer rides 422 (40.3%)

**ITN Rides by Purpose**

**July 2004 to December 2006 (3 years) 47,176 ride segments**

- **Church / Spiritual**
  - 866 Worship
  - 177 Social
  - 44 work
- **Consumer**
  - 1,983 Grocery
  - 1,945 Hair
  - 341 Mall
  - 310 Pharmacy
  - 286 Banking
  - 469 General
- **Educational**
  - 402 School
  - 60 Cultural
  - 12 Library
- **Home/return 21,224**
- **Employment**
  - 2,943 Paid
  - 278 Volunteer
- **Intermodal**
  - 103 Bus
  - 97 Airport
  - 28 Train
  - 25 Ferry
- **Professional Services**
  - 22 Veterinarian
  - 17 Finance
  - 16 Lawyer
- **Recreation**
  - 1,251 Exercise
  - 638 Dining
  - 90 Gaming
  - 90 Show
  - 7 Museum
- **Social**
  - 856 Nursing home visit
  - 289 Social visit
  - 125 Hosptial visit
  - 86 Funeral
  - 51 Community affairs

- **Medical**
  - 3,836 General medical
  - 2,606 Dialysis
  - 1,688 Adult Day Care
  - 863 Eye Care
  - 832 Physical Therapy
  - 688 Lab Tests
  - 576 Dental
  - 309 Podiatry
  - 146 Audiologist
  - 143 Psychiatric
  - 85 Cardiologist
  - 59 Cancer Treatment
  - 50 Annual Physical
  - 39 Surgery
  - 35 Chiropractor
  - 28 Immunizations
  - 25 Mammogram
  - 14 Occupational Therapy
  - 14 Acupuncture
  - 9 Vision Therapy

**How Do ITN *Portland* Customers use the Service?  
(3 years of data, 1/04 to 12/06) (n=670)**

**ITN*Orlando* Rides by Purpose (04/04/07)**

- 476 Home / return
- 182 Medical
- 129 Recreation
- 118 Consumer
- 49 Worship
- 46 Employment
- 28 Social
- 4 Professional services
- 3 General
- 2 Education

**ITN*America* Community outreach Programs  
Turn Caring into Support and Dollars  
Individuals & Families**

- Membership
- Gift Certificates

**Vehicles & Gifts in Kind**

- Car Trade <sup>™</sup>
- Car Donation
- Gifts in Kind

**Merchants, Health Care Providers & The Business Community**

- Ride and Shop
- Healthy Miles

- Healthy Smiles
- Corporate Sponsorship

### **Community Organizations**

- Ride Services
- Ride Sponsorship

### **Volunteers**

- Transportation Social Security
- Road Scholarship program

### **Municipalities & Government Organizations**

- Community Road Scholarship Program

### **Fundraising Events & Programs**

- March of the Members
- Annual Appeal
- Adult Child Membership Campaign
- Planned Giving

*In the second year, ITN teaches affiliate communities how to fundraise. Now looking at a national campaign.*

### **How do families and healthcare providers use ITN to help older people?**

- Try to have a conversation about supplementing driving before driving stops
- ITN is designed especially for older people to be as much like their own car as possible
  - 24/7 service
  - Membership organization
  - Personal transportation account
  - Newsletter and special events – many other people already belong
  - Supported by the entire community for older people – volunteers, healthcare providers, businesses, adult children and families
  - Gift certificates
  - *Car Trade*
  - Transportation Social Security
  - Road Scholarship Program and Community Road Scholarship Program
  - Creative Ride of the Month Award
- Families can buy a gift certificate, accompany on the first ride and arrange a car trade.

### **Is there a transition from driving?**

- Compensating behavior as drivers – only fair weather, no unfamiliar neighborhoods, no interstate highways, no rush hour, no left turns, no night driving, co-piloting.
- Compensating behavior as passengers – acting available, inviting drivers to social activities, fearing to criticize, shrinking the circle of activity
- Balancing safety / mobility / pride – may lead to risk taking behavior.

### **How ITNAmerica Supports Affiliate Communities**

- Centralized database management and information system – *ITNRides*
- Membership reciprocity among affiliates
- Mutually beneficial balance of national and local support – universal face (*metaphorically all have eyes, nose, and mouth, yet each community face is different.*)
- Brand support – marketing and communications (*available via internet*)

- Learning Clusters, peer support
  - National Conferences
  - Summits – *issue focused (ie. family and adult children)*
  - Retreats
- Affiliate Community Advisory Board – governance – *each affiliate has a member on the board.*
- ITNAmerica Research Group – *collecting priceless research data.*
- ITNAmerica Policy Group – *policy makers – incentives / removing barriers.*

*Affiliate agreements:*

- *define service area*
- *start small*
- *include an expansion area*
- *mission driven, therefore if another community wants to take up a portion of the service, if your organization can't expand to meet the need, they must relinquish that area from the originally proposed expansion area*

*ITN is working on transport in rural areas, international growth, taking technology and applying it to more than Senior transportation.*

*They are in the mobility business not the software business.*

*Cost:*

*\$35,000 – 1<sup>st</sup> year*

*\$20,000 – 2<sup>nd</sup> year*

*\$15,000 – 3<sup>rd</sup> year*

*\$5,000 – 4<sup>th</sup> year*

*(technology would cost \$250,000 – not sold on its own)*

*ITNLite – a software licensing to support a community service*

*Need to create a 5 year budget:*

*staffing*

*infrastructure*

*fundraising*

*Volunteers need to have a clear driving and criminal record, they also include a driving test and car inspection.*

*ITN has been sued, and insurance has settled.*

### **Affiliate Support**

- Who contacts ITNAmerica to start an affiliate? (*community based role out, only go to communities who want it – not like a business role out.*)
- Pre-affiliate process (*Business Plan will take approximately 1 year*)
  - Application and Service area
  - Building a steering committee
  - Finding a sponsor (*until you become a charitable organization*)
  - Raising the start-up funds (*ITN helps new communities –presentations, writing grants, forum – foundations etc.*)
  - Laying the groundwork for independence
  - Signing the affiliation agreement (*if not happy, you can leave*)
- Collegiate process –*process of sustainability, new actions in each year.*
  - *Freshman year*
  - *Sophomore year*
  - *Junior year*

- Senior year
- National conferences and summits

### **ITNAmerica Organization Chart for Affiliate Support**

*(a circular model with the ITN Affiliates in the middle – designed to support the affiliates)*

- Policy - Katherine
- Affiliate Support (Customer Service) – several staff talking with potential communities
- Technology – half of staff
- Marketing and Communication – manager and external marketing firm
- Finance – chief financial officer (budgets) helps affiliates
- Research – group
- Fundraising
- Learning and instruction – last piece to be developed, now a whole dept., portal on web for training.

*ITN is hoping to have 40 affiliates by 2010*

*The rebuild of the technology would cost approx. \$1.5 million*

*ITN has been asked to expand to other countries for over 5 years. The board has been saying no up until now.)*

### **Learning and Developmetn**

- Training systems
  - Web-based
  - On site – affiliates come to ITNAmerica 1 week at a time
  - Portal
  - Group conference calls
- Curricula for the collegiate process
- Training program – continuous improvement
  - Volunteer recruitment and management – huge portion of effort - media
- Best practices

### **Marketing and Communications**

- websites – national & affiliates
- Affiliate portal- *currently being built, ready by Aug 08*
  - Dashboard & scorecard
  - Document download area
  - Website management area
  - Content management system
  - News & best practices
- Messaging and brand management
- Media and press releases
  - earned media toolkit
  - Newsletter – national and affiliate template
- National marketing alliances
- Affiliate marketing programs

### **Research & Evaluation**

- **Atlantic Philanthropies Evaluation:** What is the impact of ITN on the quality of life of older adults, family members, and volunteer drivers?

- **Physician Training in ITN Affiliate Communities:** How does the availability of ITN impact the physician's willingness to address the driving issue with patients?
- **Mapping the Older Driver Evaluation Process: A Case Study:** How does the introduction of alternative transportation options into the driving evaluation process affect the older adult's acceptance of the transition to driving cessation?
- **Driving Life Expectancy of Elderly Drivers in the United States in the 21<sup>st</sup> Century:** How many years of life, on average, will older adults depend on alternative transportation after they stop driving? (*research indicates that people outlive driving by 7 – 10 years*)
- **Why Use ITN? Evidence on where older people go when they don't drive:** What are the mobility patterns among older adults when driving ceases or decreases?

### **Fundraising and Development**

- National
  - Corporate sponsors & alliances
  - Philanthropies & Foundations
- Affiliate
  - Corporate sponsors & alliances
  - Philanthropies & Foundations
  - State legislatures, municipalities, counties (*policy makers – make it easy for them – not having to cost them a lot*)

### **The possibility of ITNCanada**

- Business Plan
  - *Standards – locally determined*
  - *Legal Issues – ethics*
  - *Technology issues – privacy & security issues*
- Selecting pilot sites – *ideal size of community 200,000 or more*
- Developing sponsors

### **Contact Information**

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