



MAKING ENDS MEET: ELDER ECONOMIC SECURITY

A Quick Reference Guide On:
Promoting Safe and Affordable Elder Transportation

Monthly Tools and Information
From the Elder Economic Security Initiative™ Program

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Update on the National Initiative

WOW kicked off Older Americans month with our first annual blog action day, "[Blog About It: Elder Economic Security](#)". Over 20 national and state organizations co-sponsored the event and 16 guest bloggers wrote on topics ranging from pensions to access to benefits. We received numerous comments on the [National Elder Economic Security Initiative Blog](#) and logged over 1,000 hits in just one day! In addition, the [Coalition on Human Needs](#) (a co-sponsor) had their blog post featured on the well-known [Huffington Post](#).

All the website traffic and cross posting, created a dynamic dialogue on elder economic security throughout the blogosphere. Needless to say, this first event was a success. We look forward to making it an even bigger event next year!

What's more, if you haven't already, we encourage you to check out our special "Blog About It" [video of women's perspectives on retirement security](#).



This month, WOW turned a spotlight on the economic security of women as they age. On Wednesday, May 20th WOW hosted a national webinar, "Promoting Economic Security for Older Women: National, State and Community Perspectives." Speakers included:

- [Diane Walder: Personal Story](#)
- [Ramsey Alwin, Wider Opportunities for Women: National Perspective](#)
- [Lisa Sementilli, Connecticut Permanent Commission on the Status of Women: State Perspective](#)
- [Paul Downey, Senior Community Centers: Community Perspective](#)

Following the national webinar, WOW released [national](#) and [state fact sheets](#) on the status of older women's economic security.

Finally, we are pleased to share with you a statement from the Institute on Assets and Social Policy at Brandeis University, Demos, the Gerontology Institute at the University of Massachusetts Boston and WOW regarding the complementary nature of our two measures of economic security. [Please see the statement here](#). We hope you find the two tools useful in your ongoing advocacy efforts!

WHAT and WHY it Matters

WHAT categories of elder transportation exist?

Elder transportation refers to various methods of elders' mobility. These methods of mobility commonly fall into two categories of travel: (1) **independent** and (2) **dependent**.

Independent Travel

According to the [Department of Transportation](#) (DOT), 30 of the 38 million elders age 65+ are licensed to drive, representing 15 percent of drivers on the road. Costs for independent travel depend on distance traveled and the number of trips elders must undergo. [The National Highway Traffic Safety Administration](#) is the unit within the DOT that oversees and researches the various aspects of older Americans on the road.

Dependent Travel

Elders who cannot travel on their own often depend on friends, relatives, public transportation, or other services to meet their needs. On the federal level, the Department of Transportation funds the [National Center on Senior Transportation](#) (NCST) which provides an array of information about transportation opportunities for seniors. Established in 2006 the NCST looks to provide even more substantive information and services in the future. The [Independent Transportation Network](#) (iTN America) is the first and only national elder transportation non-profit organization. Funded in part by [the Atlantic Philanthropies](#), iTN America provides elders in Kentucky, Connecticut, South Carolina, Illinois, California, Florida, Maine, Iowa, and Missouri with door-to-door free transportation and also provides caregivers with a gift certificate option to help with their elder parent's transportation needs.

Sources: [Department of Transportation](#); [Independent Transportation Network](#)

WHY does elder transportation MATTER?

Transportation is fundamental to assuring elders are able to meet their basic needs and age in place in their communities. For those unable to travel independently, due to health issues or affordability, travel opportunities can be extremely difficult to come by without community-based services and supports. Whether going to the store or the hospital, elders need access to safe transportation. Many are dependent on others to facilitate their mobility.

Findings from Elder Indexes released in [Massachusetts](#), [California](#), [Pennsylvania](#), [Illinois](#), [Wisconsin](#), [Minnesota](#), [Connecticut](#), and [New Jersey](#) show that transportation costs vary between and across the states. In Illinois, for example, transportation is more expensive for a single elder living in a rural county than one living in Chicago who has access to public transportation. According to the Elder Index, an elder in Tazewell county will spend **\$286 a month on** transportation versus the conservative estimate of **\$35 a month** in Chicago. On average, single elders spend about 20% of their monthly expenses on transportation, whether they rent or own a home.

Check out the
website!

Visit:
www.wowonline.org

Fundraising Spotlight:

Our work would not be possible without generous support from funders in our partner states and communities.

Helen Bader Foundation
(Wisconsin)

Louise H. Landau Foundation
(Illinois)

United Way of Southeast Pennsylvania

The Boston Foundation
(Massachusetts)

California Community Foundation

California Wellness Foundation

The California Endowment

The HEALTH Trust
(California)

United Way of the Bay Area
(California)

Michigan AARP

Many thanks to the state and local foundations supporting our efforts!

Table D-6: The Elder Economic Security Standard Index for Tazewell County, 2007
Monthly Expenses for Selected Household Types

Expenses/Monthly and Yearly Totals	Elder Person			Elder Couple		
	Owner w/o Mortgage	Renter, One Bedroom	Owner w/ Mortgage	Owner w/o Mortgage	Renter, One Bedroom	Owner w/ Mortgage
Housing	\$386	\$485	\$843	\$386	\$485	\$843
Food	\$215	\$215	\$215	\$395	\$395	\$395
Transportation	\$286	\$286	\$286	\$369	\$369	\$369
Health Care (Good Health)	\$356	\$356	\$356	\$711	\$711	\$711
Miscellaneous	\$249	\$249	\$249	\$372	\$372	\$372
Index Per Month	\$1,492	\$1,591	\$1,949	\$2,233	\$2,332	\$2,690
Index Per Year	\$17,900	\$19,089	\$23,388	\$26,795	\$27,984	\$32,282

Source: [Elder Economic Security Standard™ Index](#) for Illinois

Data You Can Use

- ✓ There are at least 2 million immobile elders in the United States.

Source: [Journal of the American Medical Association at Mt. Sinai School of Medicine, June 2008](#)

Policy Center

Transportation costs for older adults are influenced by a number of factors: how many trips they take, the distance traveled, and the mode of transportation (e.g. a car, public transit, or require specialized transportation due to mobility and medical needs). The Elder Economic Security Standard™ Index (Elder Index) has tracks for elder automobile owners and elders using public transit, when utilization rates hit a predetermined threshold. The Elder Index uses data on average cost and miles driven from the National Household Travel Survey and U.S. Internal Revenue Service (IRS) to determine private automobile costs. Mileage is calculated by multiplying annual mileage driven by retired adults by the IRS reimbursement rate. If appropriate, the Elder Index uses local senior public transportation data. Because the Elder Index focuses on basic living costs for low- and modest-income older adults, we do not include air travel.

Physical limitations often associated with aging force many older Americans to stop driving, leaving them isolated and without transportation. Limited transportation options affect elder access to affordable goods and services, straining finances and jeopardizing elder economic security. Elders are often forced to depend on alternative methods of transportation as driving oneself becomes more of a challenge.

Research shows the elderly use public transportation when it is available, although only one half of Americans 65 or older have access to public transportation to meet their daily needs. Elders living in urban areas are more likely than those in rural areas to have access to public transportation. Elders fortunate enough to still drive spend on average up to 22 percent of their budget on maintaining a private automobile.

Mobility is essential to maintaining elder economic independence when accessing needed goods and services. To ensure mobility for elders as they age in place, the following policies must be implemented:

- Traditional public transportation systems must be enhanced and designed to make everyday services more easily accessible to elders by adding technological enhancements such as lifts.
- Federally funded public and private transportation planning must consider the needs of

elders. Specifically, the American Recovery and Reinvestment Act and the Safe, Accountable, Flexible, Efficient Transportation Equity Act (SAFETEA-LU) funds should be coordinated to improve community design to increase ease of access for elders. Advocates such as TEN (the [Transportation Equity Network](#)) are urging Congress to transit access to all communities in this year's re-write of transportation legislation.

- Out-of-pocket transportation costs for low-income elders must be decreased. Specifically, transportation funding under the Older Americans Act should be expanded to include subsidized vouchers for elders to use on taxis and public transportation.
- Congress must amend Medicare legislation to provide Medicare coverage for non-emergency medical transportation for medically-necessary treatment.
- Congress must increase investment in current transportation systems to ensure elder needs are accommodated. Specifically, fully fund the Federal Transit Administration's (FTA) Section 5311 and Section 5310 to expand and improve services to meet the needs of elders in rural areas and provide for specialized transportation programs for frail elders.

State Spotlight

Congratulations to New Jersey!

Our New Jersey partner, the [New Jersey Foundation for Aging](#) (NJ4A) launched the Elder Economic Security Initiative earlier this month with an array of exciting events over the course of three days! Representatives from NJ4A, WOW, the Gerontology Institute at the University of Massachusetts Boston, the NJ Department of Health and Senior Services, multiple Area Agencies on Aging and others were on hand to release the [Elder Index](#) and a complementary state [policy brief](#).

The launch events were kicked off with a press conference and legislative briefing at the State Capitol in Trenton. Two other press conferences were held in New Brunswick and also in Toms River where over 150 seniors were in attendance! Finally, the Elder Index findings were shared during a research briefing at the Rutgers Center for State Health Policy. To find out more and view the launch materials, click [HERE](#).

Questions from the Field and Answers

Q: Are advocates, service providers or others using the Elder Index to promote access to affordable transportation for elders and their families? If so, then how?

A: Yes, many of the Initiative's state partners reference transportation issues in a set of statewide policy recommendations released alongside the findings of the Elder Index. The Elder Index demonstrates the high cost of maintaining a personal vehicle for elders, particularly those living in rural communities who lack access to public transportation options and must drive further for goods and services.

This data and information is being used to support recommendations to expand unique regional pilot programs and increase the affordability of community-based options. For instance, [policy recommendations](#) released by the Pennsylvania Elder Economic Security Initiative outlined several transportation-related recommendations related to expanding existing transportation services, fully subsidizing service delivery for low-income elders, enhancing service coordination across regions, and improving communication with clients.

Join the dialogue!

Visit:

<http://wow-eesi.blogspot.com/>

Upcoming Events

Western Reserve Area Agency on Aging Conference on Independent Living Wednesday, June 3 in Cleveland, Ohio

- ✓ The Initiative will be featured at the [WRAAA regional conference](#) in Cleveland, Ohio. WOW Field Manager, Stacy Sanders, will be introducing the concepts and tools behind the Initiative as well as the applications and uses of an elder economic security framework for change.

National Ethnic Media Expo & Awards

Friday, June 5 in Atlanta, Georgia

- ✓ The Initiative will be a part of a roundtable discussion at the New America Media National Expo. WOW Director of Economic Security Programs, Ramsey Alwin, will be presenting the Elder Index at the aging-focused discussion. The event will feature over 200 journalists from around the country that report on issues and concerns of various ethnic groups.

New Jersey Annual Conference

Tuesday, June 16 in Trenton, New Jersey

- ✓ The Initiative will be a part of the 11th Annual New Jersey Foundation for Aging Conference for Professionals, "Supporting the Infrastructure of Aging and Caregiver Resources in Turbulent Times". WOW Field Manager, Stacy Sanders, will facilitate two workshops. [Read the brochure](#) for registration details.

Michigan Statewide Launch

Tuesday, July 14 in Lansing, Michigan

- ✓ Our Michigan partner, [Elder Law of Michigan](#), will launch the Initiative this summer with an event at the Capitol in Lansing. More details coming soon!

Resources and Tools

National Highway Transportation Safety Administration on older population of drivers:

- ✓ [Older Population Traffic Safety Fact Sheet](#)
- ✓ [Promoting Older Driver Safety and Mobility in Your Community Toolkit](#)

Find transportation options in your community through the Elder Care Locator:

- ✓ [U.S. Administration on Aging Elder Care Locator](#)

First and only national non-profit for elder transportation services:

- ✓ [Independent Transportation Network \(iTN America\)](#)

AAA Foundation's recommendation on licensing policies for older drivers:

- ✓ [2008 North American License Policies Workshop Recommendations](#)
- ✓ [Medical Fitness to Drive and a Voluntary State Reporting Law Project](#)
 - [Fact Sheet: Characteristics of Reported Older Drivers & Safety Outcomes](#)

Wider Opportunities for
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The [National Center for Senior Transportation](#) hosted an audio conference on May 28th, 2009 entitled, “ Senior Transportation Programs: Raising Revenue and Awareness”:

- ✓ [Creating a Network of Care](#) (PowerPoint Presentation by Barbara Huston, Co-Founder, Partners in Care)
- ✓ [Senior Transportation Programs](#) (Power Point Presentation by Katherine Freund, President & CEO, iTN America)

Skill Development: Power Point Do's and Don'ts

DO's and DONT's on Creating and Delivering a Power Point Presentation

- ✓ **DO** write a script to focus your ideas to help focus your presentation and allow you to figure out what to say and how to say it.
- ✓ **DO** storyboard your script to clarify your ideas. Your presentation should follow a story format, with a clear beginning, middle and end as opposed to separate slides devoted to individual concepts or ideas. By doing so, you will build upon your strong story foundation, and increase your confidence in the topic.
- ✓ **DO** everything you can to be an engaging speaker, even a performer of sorts! Use your Power Point to engage the audience and keep their attention.
- ✓ **DON'T** use generic category headings; it will make it difficult for your audience to recognize the presentation's focus.
- ✓ **DON'T** read your slides to the audience, it limits your ability to demonstrate confidence and express your personality.

Source: [Moving Beyond Bullet Points: A Three-Step Process by Cliff Atkinson](#)