

***TRANSPORTATION  
TASK TEAM REPORT TO  
THE CALIFORNIA  
COMMISSION ON AGING***

Prepared for  
**PLANNING FOR AN AGING  
CALIFORNIA: AN  
INVITATIONAL FORUM**  
March 8, 2005

Prepared by  
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## The Purpose

The purpose of this document is to provide a status report of the work of a stakeholder task team on Transportation organized around working on implementation of “Planning for an Aging California Population” (Health and Human Service Agency October 2003).

## Task Team Members

|                       |  |
|-----------------------|--|
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(Continued)**

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| Chris Herre                | Senior Transportation Planner, Caltrans-Mass Transportation                           |
| Marla Hollander, MPH, CHES | Director, Active Living Leadership Adjunct Professor, San Diego State University      |
| Clay Kempf                 | Executive Director, Seniors Council   |
| Helen Kerschner            | President & CEO, The Beverly Foundation   |
| Doug Langille              | Senior Associate, Nelson/Nygaard Consulting Associates                                |
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| Kimberly Martinson, CAE    | Executive Director, Transportation Management Association of San Francisco            |
| Gail Meeks                 | Department of Health Services   |
| Rae Monohan                | Program Director, UCP of Greater Sacramento   |
| Kelly Morin                | Planner, LSC Transportation   |
| Craig T. Mueller, Ph.D.    | Vice Chairman, Planning Commission, City of Rancho Palos Verdes                       |
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**Task Team Members  
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## I. Forward

### A. Who is the California Commission on Aging?

The California Commission on Aging (CCoA) was established in 1973 by the Burton Act. It was confirmed in the original Older Californians Act of 1980 and reconfirmed in the Mello-Granlund Older Californians Act of 1996.

The Commission serves as "*the principal advocate in the state on behalf of older individuals, including, but not limited to, advisory participation in the consideration of all legislation and regulations made by state and federal departments and agencies relating to programs and services that affect older individuals.*" As such, the CCoA is the principal advisory body to the Governor, State Legislature, and State, Federal and local departments and agencies on issues affecting older Californians.

### B. SB 910—Aging Planning Legislation

California is home to nearly four million people over age 65—the largest older adult population in the nation. This number is expected to more than double over the next several decades as the baby boomers begin reaching this milestone. To address this impending reality, Senator John Vasconcellos wrote Senate Bill 910 (Ch. 948/99, Vasconcellos). The bill mandated that the California Health and Human Services Agency develop a statewide strategic plan on aging for long term planning purposes. On October 14, 2003, the *Strategic Plan for an Aging California Population—Getting California Ready for the Baby Boomers*, was completed with the major support of the CCoA and a plan development task team representing 25 older adult stakeholder organizations supported by 15 state departments. The Governor signed the plan in November 2003. (The Strategic Plan can be reviewed at [http://www.calaging.org/works/population\\_files/population.pdf](http://www.calaging.org/works/population_files/population.pdf).)

### C. CCoA's Monitoring Role of the Strategic Plan

SB 910 calls for periodic updates so that it can be continuously improved and reflect new circumstances, new opportunities and the changing socio-political environment. The CCoA agreed to assume responsibility for the monitoring and updating the Strategic Plan. In this capacity, the CCoA is responsible for convening stakeholders, holding meetings, and monitoring the progress of priority action items outlined in the Plan. The CCoA will report to the Legislature the progress of the Plan's implementation, and update the Plan's contents to reflect changing priorities and actions. Reports to the Legislature will be on a biennial basis.

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The CCoA's approach to monitoring the Strategic Plan's implementation during 2003-2005 includes:

- Encouraging/facilitating work on Strategic Plan implementation by convening nine new stakeholder task teams, facilitating initial meetings and establishing partnerships with two previously formed stakeholder teams.
- Dialoguing with state officials at the March 8, 2005 Forum on the top 15 priorities in the Strategic Plan.
- Distributing and compiling the results of a baseline questionnaire on the Strategic Plan's 15 Priorities. The questionnaire was distributed to private, public and non-profit providers and aging advocates.
- Reporting to the Legislature by May 2005, on the progress of the Strategic Plan.

#### **D. Stakeholder Task Teams**

Eleven Stakeholder Task Teams have been charged with identifying and focusing efforts on several of the top priority recommendations, developing action plans to support or achieve implementation of these priorities and identifying necessary amendments or additions to the original Plan. These volunteer Task Teams have been meeting for the period October 2003 through December 2004, though some Task Teams started their efforts later than others. Written reports have been received from all Task Teams—copies are available from the CCoA office. The focus areas for the 11 stakeholder task teams are: Housing, Economic Security, Elder/Financial Abuse, Transportation, Wellness/Prevention, Mental Health, Oral Health, Long Term Care, Palliative/End of Life Care, Assistive Technology, Provider Workforce.

The choices and actions taken by the Task Teams are solely their own and do not necessarily represent the position of the CCoA.

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***Strategic Plan for an Aging California Population***  
**Report to the California Commission on Aging**  
**March 8, 2005**

**Transportation Task Team**

**II. Background on Transportation**

The *Strategic Plan for an Aging California Population* concluded that mobility is critical to the well-being of California's elderly and presented a number of recommendations to coordinate and improve transportation services. Please refer to the Strategic Plan for background information on transportation issues.

**III. Current Status of Transportation Task Team**

The Transportation Task Team was formed and led by the California Department of Transportation, with considerable support from the CCoA and the California Association for Coordinated Transportation (CalACT). Membership included representatives from the human service transportation industry, aging and disabled communities, economically disadvantaged, and other stakeholders. Task Team members are listed on page i of this document.

The Task Team began its work by reviewing the *Strategic Plan on an Aging California* including the full list of Transportation recommendations. The Task Team worked through a selection process to identify four implementation priorities. The priorities represent what the Task Team members felt could be reasonably accomplished in the current environment. For each of these priorities, an Action Plan was created. As a final step, the Task Team compiled a list of barriers that hinder implementation.

The initial meeting was held on June 30, 2004, with eight monthly meetings held since then. Two subcommittees were established in July 2004: the Walkability Subcommittee and the Service Coordination and Transportation Alternatives Subcommittee, which have been holding monthly meetings as well.

The Walkability Subcommittee has two areas of emphasis: 1) to make neighborhood streets and sidewalks safer and more accessible so that seniors can choose to walk if they do not drive, and 2) to promote more physically active lifestyles. The benefits of physical activity are numerous, e.g., reducing the risk of premature mortality from coronary heart disease, hypertension, colon cancer, and diabetes mellitus, as well as from fall-related hip fractures. Additionally, walkable neighborhoods increase opportunities for social interactions, which are critical to preventing isolation and depression. Walking is an "easy fix" since it is the most inexpensive and popular form of physical activity for seniors.

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A major effort for the Service Coordination and Transportation Alternatives Subcommittee was the application for federal funds to convene a Mobility Summit to further integration and coordination as recommended in the Strategic Plan. (See Attachment 2 – Application for FTA United We Ride State Coordination Grant.) The FTA recently approved funding for the Summit. The Transportation Task Team is working in partnership with the CCoA to conduct the Summit in coordination with the Commission’s Invitational Forum and White House Conference on Aging: Solutions Forum. The combined program will be entitled, “Convening Aging & Transportation Leadership” and will be held March 7-9, 2005 in Sacramento.

Several presentations have been made by the Transportation Task Team Chair to solicit Task Team participants, report on the status of the Task Team progress, and to garner support for the implementation of the Strategic Plan strategies. These include:

1. CalACT Conference Presentation, San Diego - April 5, 2004
2. Senior Mobility Forum Presentation, Seaside - June 25, 2004
3. CalACT Conference Presentation, Sacramento - October 1, 2004

A number of related efforts are underway to help address other Strategic Plan recommendations. For example, the Department of Transportation has formed a TDA Working Group to examine the need for changes or clarifications to the TDA regulations, especially in relation to fare-box recovery ratio requirements. A subcommittee of CalACT is participating in state efforts to modify the states Medicaid program, called MediCal. The group is looking at reform issues, such as changing policy to permit MediCal funds to support transportation by transit, and adequate reimbursement of transportation costs for non-emergency medical trips. The Beverly Foundation, in conjunction with the Community Transportation Association of America, has recently published “Innovations for Seniors” as a guide to community transportation alternatives. Presentations have been made to Transportation Task Team members on these topics and others as they have become available. The California Foundation of Independent Living Centers is researching methods to increase the availability of accessible taxis. They have convened a group of stakeholders that have met several times to discuss the issue.

An essential part of the Task Team’s success will be the ability to continue the momentum from the Mobility Summit and put some of the issues discussed into practice.

#### IV. Transportation Implementation Priorities and Action Plan

| Priority  | Action Plan  |
|---|--|
| Support Pedestrian-Oriented Facilities and Services | <ul style="list-style-type: none"> <li>• <u>Foster healthy pedestrian (walking) lifestyles</u> <ol style="list-style-type: none"> <li>a) Seek funding to replicate and sustain Safe Neighborhoods for Seniors (SN4S) programs, originally a public health demonstration project funded by the Robert Wood Johnson Foundation. These local coalition-driven projects work on environmental and social norm changes to make communities more walkable for seniors.</li> <li>b) Design and conduct an annual Universal Walkability Day that promotes walking for seniors (and for everyone). It could include best practice awards, walking contests, safe route maps, etc. to make it an entertaining and positive experience. Seek corporate and local business sponsors.</li> <li>c) Work in concert with Ride Share programs across the state to incorporate a “Walk Share” component that would utilize existing databases to promote the concept and to connect walking buddies.</li> </ol> </li> <li>• <u>Improve connections between destinations with safe walking routes</u> <ol style="list-style-type: none"> <li>a) Work with Department of Housing and Community Development (HCD) to include walkability in its guidelines to local governmental entities that inform development of local General Plans (e.g., select strategies to incorporate walking based on a walkability audit). <p><b>Note:</b> HCD is the authority that accepts reviews and approves General Plans, and awards community development block grant funds based on those plans.</p> </li> <li>b) Develop and disseminate educational fact sheets for city and county planners, planning commissioners, public works directors, and traffic engineers to raise awareness on requirements set forth in state statutes related to accessible sidewalks.</li> </ol> </li> </ul> |

| Priority   | Action Plan   |
|--|---|
| Support Pedestrian-Oriented Facilities and Services (continued)  | <p><b>Note:</b> This is especially important for planning officials who review and approve senior housing projects. (Currently, they usually “pass” projects that adhere to the less stringent federal statutes). These educational fact sheets will also include examples of best practices and other positive outcomes to ensure that the tone is not punitive one. Letters disseminated by Attorney General on accessibility can serve as models. Seek advice from the Independent living Centers (ILC) who can offer examples of changes in “real time” that have been effective.</p> <ul style="list-style-type: none"> <li>• <u>Improve pedestrian access to transit</u> <ol style="list-style-type: none"> <li>a) Seek funding to conduct a survey of local transit stops. This would be the first step in determining what actions are needed to improve senior pedestrians’ ability to use transit.</li> </ol> <p><b>Note:</b> AARP’s <i>Livable Communities: an Evaluation guide, 2000</i> could guide the development of this survey. The SR4S projects should conduct these surveys as part of their scope of work—their ideas related to appealing and accessible solutions would inform subsequent actions.</p> </li> </ul> |
| Plan and Implement Integration and Coordination Strategies and Provide a Continuum of Coordinated Services | <ul style="list-style-type: none"> <li>• <u>Host the Mobility Summit as described in the United We Ride application.</u> <ol style="list-style-type: none"> <li>a) A Mobility Summit Planning Committee is implementing this action item. The plan is to leave the March 7, 2005 Mobility Summit with specific next steps and a commitment to form a steering committee tasked with establishing the California Mobility Council and Mobility Task Force as described in the LRSPA.</li> <li>b) Continue the momentum from the Mobility Summit and put some of the issues discussed into practice. Our goal is to leave the Mobility Summit with the outlines of a work plan that will carry the TTT’s work into the future.</li> </ol> </li> </ul>   |
| Strengthen Consolidated Transportation Service Agencies (CTSAs)  | <ul style="list-style-type: none"> <li>• <u>Conduct an assessment of CTSAs and best practices.</u> <ol style="list-style-type: none"> <li>a) This will be an evolving document, which will continue to grow as interest increases.</li> </ol> </li> </ul>   |

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## V. Barriers to Transportation Priorities Implementation

The following barriers to implementation have been identified:

### Barriers to Walkability

- Social norms that deem walking as “uncool” for people who can’t afford to do otherwise.
- Potential liability if seniors fall on premises when walking.
- Lack of funding and the concomitant challenge that funding silos present when funders do not allow flexibility when it can be demonstrated added value when funds are braided with other projects and resources.
- Lack of political will to make systematic changes.

### Barriers to Integration, Coordination, CTSAs

- Lack of state and local leadership to coordinate programs and services.
- Lack of regulatory authority to mandate that CTSAs be established and perform service coordination and improvement functions.
- Lack of incentives to coordinate or improve services.
- Lack of consensus by stakeholders due to programs being funded from different “silos” and subject to differing requirements.
- Lack of resources, particularly funding and staffing, at the local and state level.
- Funding Silos.
- Lack of local leadership to coordination.
- Lack of coordination incentives.
- Dollars need to follow the person (from various funders) not follow the program.
- Lack of political will to make systematic changes.

## VI. Proposed Revisions to the *Strategic Plan for an Aging California Population*

The Transportation Task Team does not recommend revisions to the Strategic Plan transportation element at this time.

## **APPLICATION FOR FTA UNITED WE RIDE STATE COORDINATION GRANT**

**LEAD AGENCY:** California Department of Transportation

**CONTACT:** Peter Steinert, [peter.steinert@dot.ca.gov](mailto:peter.steinert@dot.ca.gov), (916) 654-9446

**TITLE:** Mobility Summit: Coordination of Human Service Transportation

### **QUESTIONS AND RESPONSES:**

**Question #1—Briefly describe the state’s mission as it relates to the coordination of human service transportation.**

**Response—**The overall mission of the California Department of Transportation (Department) is “to improve mobility across California”. Current law (Government Code Section 15950 et al) requires the promotion of the consolidation and coordination of social service transportation services, and centralized administration of such services. Consolidated Transportation Service Agencies (CTSAs) have been formed in many areas of the State to achieve these goals, pursuant to GC Section 15975. Other areas have no CTSAs or similar entities for service coordination. The Department works with other state departments, advocacy organizations, service providers, planning agencies and consumer groups to achieve further service improvement and coordination goals. A recent cooperative effort has culminated in the development of a long-range strategic plan on aging (LRSPA) entitled “Strategic Plan for An Aging California Population” to address the impending doubling of the State’s older population over the next several decades. This LRSPA was completed in October 2003. Subsequently, the Department was designated as lead to establish a multidisciplinary Transportation Task Team (TTT) to develop strategies to implement the LRSPA’s priority transportation recommendations.

**Question #2—Briefly describe how this grant will address and support your plans to:**

- (1) conduct a comprehensive state assessment using the UWR Framework for Action;**
- (2) develop a comprehensive state action plan for Coordinating Human Service Transportation; or**
- (3) for those states that have a comprehensive action plan, grants can be used to implement one or more of the elements identified within the Framework for Action.**

**Response—**The recently completed LRSPA developed pursuant to SB 910 (Statutes of 1999) is similar to the UWR Framework for Action, as it stresses integration and



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coordination of human service transportation. This grant is being applied for under subsection (c) to fund the implementation of the recommendation in our LRSPA to conduct a Mobility Summit. This activity is described in the LRSPA's TRANSPORTATION ELEMENT, under the SERVICE INTEGRATION AND COORDINATION Section (Attachment I).

**Question #3—Describe the level of coordination/collaboration with any other partners (providers, advocates, private for profit, non-profit organizations, or government).**

**Response**—A team of experts from the University of California Policy Research Center conducted the majority of the LRSPA background analysis and assessment work. They included professors in the fields of sociology, social and behavioral science, health management, demographics, economics, gerontology, medicine, social welfare, civil & environmental engineering, and public health. The Department established the multidisciplinary TTT in June 2004 to develop implementation strategies for the highest LRSPA transportation recommendations, including holding a Mobility Summit. The TTT is composed of representatives of the public and private social service transportation industry, senior, disabled, low-income, and worker advocacy organizations, and the gerontology field. Representatives from those organizations will be involved in the planning and implementation of the Summit. State agencies and departments providing services to older persons, persons with disabilities, and persons on low incomes will be invited to the Summit to create a dialogue with State leadership on human service transportation service delivery and coordination. Invitees will include: State Independent Living Councils, Area Agencies on Aging, the Triple-A Council of California, consumers, and others representing underserved and special needs groups.

**Question #4—Briefly describe how the state plan will meaningfully involve consumers in the development and implementation of human service transportation grant activities.**

**Response**—The development of the LRSPA involved the holding of hearings in the northern and southern parts of the State to solicit input from seniors, disabled persons, economically disadvantaged, and other consumers and stakeholders. Revisions were made to the draft LRSPA based upon input received during those hearings. The Mobility Summit will be conducted in conjunction with the California Commission on Aging - Statewide Invitational Forum being planned for February 2005, and involve a wide range of stakeholders from the planning, advocacy, service, government, and consumer areas. It will build upon recent California conferences and a national forum, including the:

- *2004 California Association for Coordinated Transportation Spring Conference, held in San Diego in April 2004;*
- *Coordinated Leadership Conference, hosted by the California Commission on Aging, California Association of Area Agencies on Aging, and the California Foundation for Independent Living Centers, held in Concord in May 2004;*

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- *Association of Commuter Transportation Spring Conference, held in San Francisco in May 2004;*
  - *Governor's Annual Older Workers Awards and Symposium, hosted by the CA Employment Development Department, CA Department of Aging, and the Senior Worker Advocate Council, held in Sacramento in May 2004; and the*
  - *North American Conference on Elderly Mobility, hosted by the Michigan Governor's Traffic Safety Advisory Commission and the Department of Transportation, held in Detroit, Michigan on September 12-15, 2004.*

The Mobility Summit will include four workshops, one of which will ask consumers to provide input about barriers among transportation service programs, including connectivity problems, and other service and coordination issues. Comments from the workshop will be included in a report on the Summit proceedings and utilized to identify necessary follow-up actions.

**Question #5—Submit a narrative of your proposed project and a budget that includes line items.**

**Response—**A Mobility Summit will be conducted in coordination with the California Commission on Aging - Statewide Invitational Forum at the Sacramento Convention Center in mid-February 2005. The Summit will establish a statewide dialogue to lead to decisions for effective action steps to address human service transportation coordination issues. Four workshops are planned to address the topics cited under Question #2, to result in the following specific deliverables:

- 1. Approval of Action Plans to Implement High Priority LRSPA Transportation Recommendations—**Approvals and commitments will be secured from the key decision-makers to move forward with action plans to implement the strategies identified by the TTT.
- 2. Identification of Consumer Issues Related to Service Connectivity to Eliminate Fragmentation—**Input will be solicited from senior service consumers regarding the barriers among transportation service programs which prevent them from fully participating in community life. Such barriers include eligibility requirements, hours or scope of operation, specific destinations and quality of service.
- 3. Establishment of a California Mobility Council and Mobility Management Centers—**Member nominations will be solicited and a California Mobility Council will be established responsible for removing barriers between programs, monitoring performance, ensuring communication and cooperation among Mobility Management Centers, and adapting state policy as needed. Nominations will also be solicited for representation on a Mobility Council Advisory Committee.
- 4. Establishment of a Mobility Task Force—**Member nominations will be solicited and a Mobility Task Force will be established to create the local and regional Mobility

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Management Centers, and be responsible to monitor implementation and ongoing compliance with policies, standards and expected outcomes.

The Mobility Summit is planned for February 14, 2005, to immediately precede the Invitational Forum scheduled for February 15 and 16 at the same location. Holding the Mobility Summit in cooperation with the Invitational Forum will provide an intersect between a large cross-section of stakeholders and state agencies. Furthermore, it will allow for increased consumer and stakeholder involvement, will stimulate cross agency/department collaboration to facilitate coordination and enhance services, and will address duplication and redundancies of programs and services. This will educate and assist decision makers in the implementation of the specific LRSPA transportation coordination strategies. In addition, there will be cost economies achieved by holding these events in partnership. The projected budget for the Mobility Summit is \$34,027.

**Question #6—States that did not participate in the UWR Leadership Forum in February 2004 must include a letter of commitment from the Governor’s Office.**

**Response—**The Governor’s Office letter of support, signed by the California Health & Human Services Agency on behalf of Governor Arnold Schwarzenegger, is included in this application. Also attached are letters of support from the California Commission on Aging and the California Association for Coordinated Transportation.