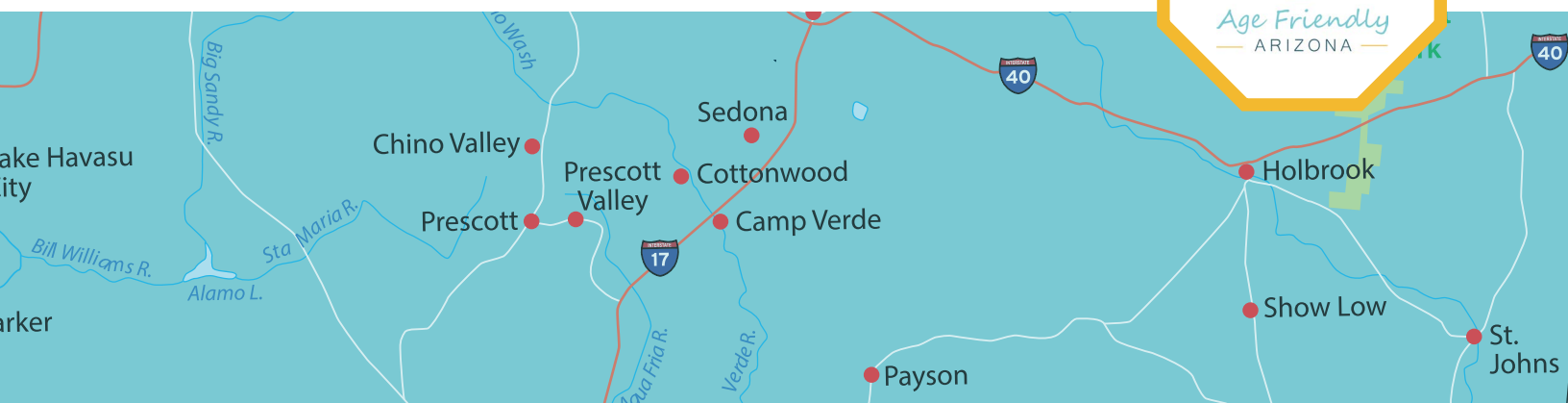


BLIND SPOT

Mobility and Aging in Rural America Insights for Philanthropy



A publication of



ACKNOWLEDGEMENTS

Age Friendly Arizona is indebted to the many partners who make the Rural Transportation Incubator (RTI) possible.

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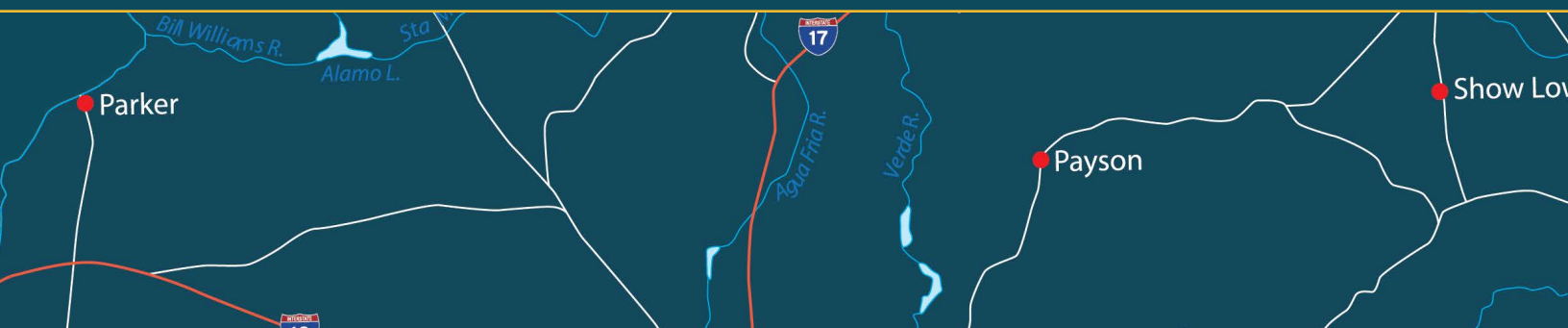


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EXECUTIVE SUMMARY

Mobility – defined as access to transportation options that are safe, reliable, affordable, and appropriate – is critical to successful aging, but often declines as we age. In rural places, where one in five older Americans live, it can be particularly difficult for older people to get around, especially if they stop driving or do not have access to a vehicle.

This report will examine the mobility challenges that confront older people in rural communities across America and profile some of the programs that exist to support them. Since public transit is less commonly available and mobility services may be more limited in rural communities, this paper will emphasize alternative programs, including services provided by volunteer drivers and nonprofit organizations. There are more than 800 such programs nationally, but recently they have faced challenges in the areas of insurance and expense reimbursement. Important aspects of successful volunteer driver programs, such as training, safety procedures, risk management, and appropriate insurance, are also covered.

Innovative models for rural mobility are sorely needed. Age Friendly Arizona (an initiative of the Maricopa Association of Governments) launched a program to support and increase mobility options for older people. The Rural Transportation Incubator, supported by a two-year grant from The Harry and Jeannette Weinberg Foundation, brought a multi-strategy, multi-partner approach to increasing mobility for older adults living in rural Arizona. This has been supporting creative public-private partnerships to enhance mobility in small communities across the state, offering a fresh vision for creative problem-solving through partnership and insights applicable to many rural settings.

Philanthropy has historically had low involvement in transportation even though better mobility is linked to better health, better quality of life, reduced isolation, and strong communities. As a guide structured primarily for funders, this report will also outline needs and opportunities for philanthropy to engage with communities in need of better mobility options and the considerable impact that this effort could have. This report was supported by the May and Stanley Smith Charitable Trust and the Federal Highway Administration.

Finally, no community and no age group has gone untouched by the COVID-19 pandemic. This report reflects on how mobility has changed and may continue to change as a result, and how funders and communities will need to adjust as a result of this enormous disruption to help older people thrive in community.

[Editorial note: underlined terms in the text indicate hyperlinks.]

MOBILITY: The Blind Spot in Rural Aging

W You gave me back my life."

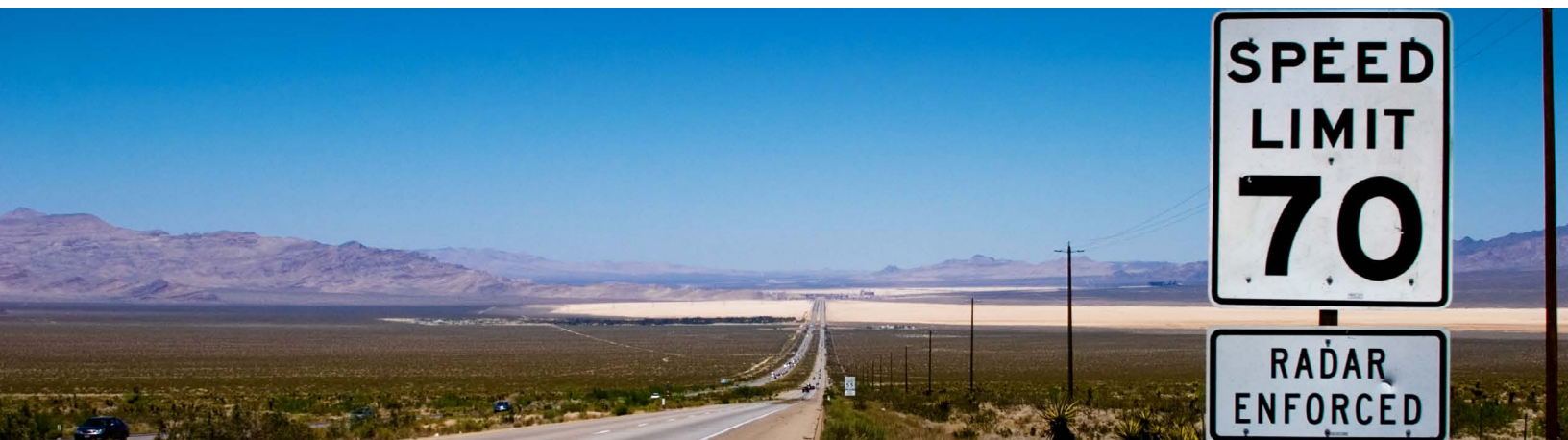
—"Neighbor" (passenger) of the volunteer driver program
Freedom Express in Wickenburg, Arizona

What does it take to age well? Many of us would say independence, health, or human connection, but a critical common denominator that seldom makes the list is mobility. Mobility is more than transportation; it means having access to transportation options that are safe, reliable, affordable, and appropriate. It's something we all need, but often declines as we age.

Nowhere is mobility a bigger challenge than rural America. Ninety percent of America's land mass is rural, covering millions of square miles. People travel long distances to get to town, to school, jobs, and hospitals, to see family, even to buy groceries. The car (or truck) is still how most get around.

Rural America is also home to one in five older Americans, about 10 million people. Some are relocated retirees or seasonal "snowbirds," some are immigrants, and others have stayed where they (and often their parents and grandparents) grew up -- in small towns, frontier areas, farms, mountains, and tribal lands.

Rural aging can be tough: generally speaking, people are less wealthy than their urban and suburban counterparts, have more chronic disease, and are twelve times more likely to live in "double burden" counties. At the same time, many are self-reliant, proud of their tight-knit communities, and committed to taking care of their neighbors.



Running Out of Road

Public transportation is often not a practical rural solution. For anyone whose vision of transit is based on city buses or commuter trains, it can be hard to grasp that rural communities may have little or no such service. Only about 80 percent of rural counties have any public transportation and it is often limited to “demand-response service,” meaning riders must call ahead (24 hours or more in advance) to make a reservation to get picked up from home. “Fixed route” service (more like a traditional city bus) is less common but even when it exists, might run only once or twice a week, or cover only a single route. In some areas, transit vehicles can’t cross city or county lines, so passengers are forced to get off and hope they can find service to finish their trip. Nighttime and weekend service is rare, companies like Uber and Lyft are almost never operational, and some older people are too frail to use transit anyway.



In short, says **Valerie Lefler**, a mobility expert and executive director of nonprofit Feonix Mobility Rising, “There are holes the size of the Grand Canyon in rural transportation.”

Nurturing Options: A Role for Philanthropy

Mobility remains an afterthought in most grantmaking as well. One measure of the problem: the Administration on Community Living reports that its Eldercare Locator consistently gets more requests for help with transportation than anything else.

“A lot of funders don’t invest because they think the government is taking care of it, but that’s not always the case,” says **Stacey Easterling**, vice president of programs at Virginia G. Piper Charitable Trust.

The perception that transportation is too big, too expensive, or too cumbersome deters many foundations, but those with experience say it is not necessary to take on the whole system. “If you’re not already funding in transportation, it may seem overwhelming,” says **C.J. Eisenbarth Hager**, director of Healthy Community Policies at Vitalyst Health Foundation. “But what is there already is often rigid and doesn’t cover a lot. Where are some of the gaps that we as funders can help fill?”

Investing in People, Finding Alignment

The challenge is to stop thinking about how mobility programs operate and focus instead on the outcomes they can empower. Many funders now view issues like hunger, housing, and education as social determinants of health. The age-friendly communities movement helps people contribute and participate at every age. Social isolation has become a funding priority because of powerful evidence that it exacerbates heart disease, depression, dementia, and even premature death. Mobility intersects and addresses all these cutting-edge issues, and many others, in important ways. Some advocates call it a tool for social justice and equity, and some regard it as a basic human right.

“You’re not funding ‘transportation’ – you’re supporting people’s ability to stay connected to their lives,” says **Carol Wright Kenderdine**, director of Easterseals Transportation Group and co-director of the National Aging and Disability Transportation Center.



Howdy, Partner

Partnership is the beating heart of transformative philanthropy but difficulty in finding traditional or familiar partners has slowed many funders from deepening their involvement in rural communities. Issues can include organizational capacity, depth of the leadership bench, or concerns about sustainability.

Experienced rural hands like **Kent Ellsworth**, executive director of Verde Valley Caregivers Coalition in Arizona (which received Toyota’s 2016 STAR award for excellence in volunteer transportation) believe that rural organizations may operate a little differently, but that should not be a deal breaker for funders willing to listen and learn. “Foundations shouldn’t shy

away from being out here on the frontier, where people lead good lives but need some support,” he says. “I have seen a lot of foundations that didn’t want to put their toe in to test these unproven waters or didn’t want to fund us because our budget is under \$1 million.”

Ellsworth also points out that rural nonprofits often have unconventional and highly effective safeguards for transparency and accountability: “The police chief is on your board!”

Funders may need to plan on some extra work locating and engaging rural partners, sometimes in unfamiliar places. The Rural Transportation Incubator project, coordinated by Age Friendly Arizona (an initiative of the Maricopa Association of Governments in Phoenix, Arizona), has been supporting creative public-private partnerships to enhance mobility in small communities across the state. 🚗(See: [An Arizona Experiment](#))

Rural funding can also offer good opportunities for smaller and community foundations because a relatively small investment can make an outsized impact. “Rural nonprofits make very good grantees,” says **Carol Wright Kenderdine** of Easterseals, which has funded rural work through its [Project ACTION](#). “We have urban programs turn up their noses at a \$20,000 grant, but the rural programs are excited. They know how to make that money stretch and work for them.”

Road to the Future: A Map of This Report

Challenges with mobility exist in every rural community, creating opportunities for philanthropy of all types and sizes to join in and help older people keep moving. This report will discuss opportunities and obstacles, explore the unique utility of volunteer transportation models (and a new challenge they are facing), highlight existing programs, and discuss funders’ range of options.

Innovative models for rural mobility are sorely needed, and this report will also introduce an ongoing collaborative project in Arizona called the Rural Transportation Incubator (RTI), which offers a fresh vision for creative problem-solving through partnership and insights applicable to many rural settings.



POSITIVELY RURAL: Volunteer Drivers Fill the Gaps

While rural infrastructure and budgets are often limited, culture is an innate strength, and a neighbor helping neighbor strategy plays to that strength.



"Rural communities have this dynamic of, 'we'll do it ourselves,'" says **Valerie Lefler**, who grew up in rural Nebraska. "Especially in frontier counties, back in the pioneer days, you had to rely on your neighbors and work together to stay alive." This may explain the ability of even small places to field enthusiastic volunteer driver programs, which many rural strategists see as the most sustainable and cost-effective option for filling gaps in service and helping older people maintain mobility in rural and frontier settings.

"There is a real urgency to offering mobility alternatives for older and low-income people in rural areas," says **Amy St. Peter**, deputy executive director of the Maricopa Association of Governments in Phoenix, Arizona, and project leader of the Rural Transportation Incubator. "As we look at funding levels decreasing in Arizona and our older population increasing, nonprofits are well-situated to address this in the most affordable way, often with volunteer driving programs, but they also need supportive partners, including local government and transit agencies."

Volunteer drivers go the extra mile, offering much more than a ride; they provide a high-touch, supportive, social experience well beyond the reach of other forms of transportation.

“Volunteers can go into someone’s home, help them find their coat, help them in and out of the vehicle, or go with them into a store or a doctor’s appointment. It’s personal,” says **Charles Dickson**, director of the National Volunteer Transportation Center.

RETURN
TO TOC

Mobile, Social, Creative at 96

Judy, 96, is a retired photographer with osteoporosis and chronic spinal pain. She is blind in one eye and has outlived her children.

This story could end badly, but it doesn’t, thanks to Judy’s connection to Verde Valley Caregivers Coalition (VVCC) in rural Verde Valley, Arizona.

VVCC volunteers take Judy to Walmart every week in a mobility van to grocery shop. “To prepare my own food means so much to me,” she says.

Judy still paints and knits and can get out to choose her own yarns. “I wouldn’t be able to see my knitting friends without my wonderful volunteers.”

Right now, Judy is thanking each of “her” volunteers by knitting them afghans in the colors of their choice.



Marana
Oro Valley
Tucson
Saguaro
National Park
San Pedro R.

Volunteer Models: All Over the Map

More than 800 volunteer driver programs operate across the country, and models vary widely, including:

- Independent nonprofits like Drive a Senior, supported by St. David's Foundation in Austin, Texas, that focus on transportation and support themselves through fundraising and grantwriting.
- Faith-based or community organizations like Shepherd's Centers of America that offer volunteer driving as one mission-driven service among several, which might include home repairs and friendly visiting.
- Time banks, such as those operated by members of the Village to Village Network, that allow members to donate or swap in-kind services including driving.
- Programs operated by government-funded entities like Area Agencies on Aging, or community grantees funded by the National Aging and Disability Transportation Center through its Federal Transit Administration (FTA) funding.



- Services for people who are ill or need dialysis, such as the American Cancer Society's Road to Recovery program.
- Programs that support and coordinate multiple volunteer driver programs.
📄 (See: HealthTran: Data and Partnerships Driving Change)
- Low-cost membership programs like Tennessee's Blount County Office on Aging SMILES (Senior Miles.)
- Traditional public transit programs that supplement their service with volunteer-provided rides.
📄 (See: High-Touch Mobility in the Rockies)

High-Touch Mobility in the Rockies

Many programs rely on the volunteer driver to provide the vehicle, but not all do. All Points Transit is a 501(c)(3) rural agency that uses dial-a-ride vans and some small buses to move residents across 4,500 very rural square miles of Colorado.

Most routes naturally bring people into its hub of Montrose, but demand was growing for long trips in the opposite direction – out of town, often to medical appointments. Handling these individual trips by bus or van was unsustainable.

All Points' efficient (and green) solution: a Toyota Prius, owned by the agency, with a carefully screened and trained volunteer driver behind the wheel. "It helps us to get folks to where they need to go, and we say 'no' less often," says mobility manager and volunteer coordinator **TJ Burr**.



The cost of volunteer driver programs compares favorably to other forms of service. Some larger rural communities are able to use Federal Transit Administration (FTA) Section 5311 funds to provide some transit services, but the overhead, match requirements, and regulatory and reporting burdens are hard for smaller communities and the cost per ride is high. Kent Ellsworth estimates that Verde Valley Caregivers Coalition's cost per volunteer-provided trip in Arizona at is about \$13, while local transit providers have told him their trips can average three to four times as much.

A stylized map of Arizona is visible in the background. It shows major cities like Bull City, Phoenix, and Marana, and major highways like Interstate 10. The map is rendered in a dark blue color with white lines for roads and red dots for cities.

Federal Transit Administration (FTA) Funds: Section 5310 and Section 5311

The Federal Transit Administration provides funding to support rural transit and transportation services for older adults and people with disabilities. These funds are available to private nonprofit organizations, states or local government authorities, or operators of public transportation. Funding is apportioned based on population size, land area, demographics, and/or competitive grant application. Both 5310 and 5311 programs require matching funds.

Section 5310 – Enhanced Mobility of Seniors & Individuals with Disabilities –


provides funding to states based on the number of seniors and people with disabilities in each state, with 20 percent earmarked for areas with populations under 50,000. Funds generally cover capital costs (such as vehicle purchases or transit-related technology), operating projects to meet the transportation needs of the targeted population, or programs such as mobility management, travel training, or volunteer driving. Funds for rural areas pass through the state Department of Transportation.

[Learn more here.](#)

Section 5311 – Formula Grants for Rural Areas –

provides capital, planning and operating assistance to states and federally recognized Indian Tribes to maintain and improve public transportation systems in rural areas and small towns with populations less than 50,000. Funds can support planning, capital, operating projects, and the acquisition of public transportation services. Recipients may be able to use 20% of their allocation for ADA paratransit service. [Learn more here.](#)

Getting Started

Some volunteer driver programs are amazingly sophisticated  (See: [Driving Innovation in Portland](#)) but most are small and low-tech, so the barrier to entry is manageable.

“It’s no secret that I’m not a transportation expert,” says **Charles Petersen**, who nevertheless built the beloved Freedom Express service in rural Wickenburg, Arizona in about a year. “I didn’t know what I was doing when I started, but I learned a lot, and every time I ran into an obstacle, I just circumvented it or overcame it.”

One snag in recruiting volunteer drivers is that any program publicity tends to generate more would-be riders than drivers. In fact, says **Helen Kerschner**, director of volunteer transportation at Shepherd's Centers of America and former director of the National Volunteer Transportation Center, drivers are some of the most difficult volunteers to recruit. "But there is a saying," she adds. "Once you've got them, you've got them," because of their sense of mission.

Driving Innovation in Portland

Sometimes rural communities are less than an hour's drive from the city but a world away in terms of mobility. Portland, Oregon's RideConnection straddles both settings and runs one of the country's most sophisticated volunteer driver programs, with a coalition of local nonprofits that brings together 600 volunteer and paid drivers and provides half a million rides each year.

"Our definition of a volunteer driver is pretty expansive," says John Whitman, RideConnection's planning supervisor, who says the organization thrives by constantly trying new things, such as:

- The **Shared Vehicle Program**, which makes RideConnection's fleet of cars and vans available to partner agencies and groups when they are not in use (usually on weekends.)



- The **Ride Together** program, which trains friends and family of older people to become their volunteer drivers and receive mileage reimbursement. "It's small, but it helps a lot of people out," says Whitman.
- About 30% of the nation's veterans live in rural places. When RideConnection saw a local vet suffering with PTSD struggling during rides, they recruited vets as drivers and launched **Veterans Helping Veterans**.

The Right Technology Helps Drive Results

Even in the age of smartphones and cloud computing, it is not uncommon for small programs to do everything with pen, paper, and the occasional Post-It note. Even when an organization is ready for more tech, older adult clients (and often, older volunteers) may not be. It is also easy to complicate matters by buying programs that have more features or capacity than the program needs or can manage.

The upside of tech done right is more and better service. Both foundation and federal funders often want to see user metrics and programs are sometimes audited, so data collection is important and helps improve service.

Some popular options for small systems:

- Smaller programs can get a big lift with something as simple as **Outlook Calendar**, entering modest notes to track the date, time, destination, and purpose of a ride. Data can then be transferred to spreadsheets for analysis.
- A free or low-cost option is **Google Sheets**, which is easily shared because it is cloud-based. Sheets can also be HIPPA-compliant (i.e., maintaining confidentiality when collecting health-related information about clients.) **Carrie Compton** from Freedom Express describes Sheets as inexpensive and “low-friction” but notes it would be easier if cells came pre-filled with the necessary formulas.
- A widely used solution is [RideScheduler](#), a web-based program that keeps things simple in part by assuming a single rider per trip. Drivers can log on to choose or cancel trips. “It’s an amazing time-saver and lets me add new codes and pull whatever reports I can imagine,” says **Kim Burks**, executive director of Volunteer Interfaith Caregiver Program (VICaP) in Sierra Vista, Arizona.

The screenshot shows the RideScheduler website. At the top is a green header with the logo "RideScheduler" and the tagline "Managed Transportation Made Simple." Below the header is a navigation bar with links: Home, Tour, More Info, FAQ, and About Us. The main content area is divided into three columns. The left column, titled "SAVE TIME & MONEY", lists benefits: accessible 24/7, streamlined client requests, easy addition of client info and new rides, and no expensive software. The middle column, titled "TOUR", contains a registration form with fields for Name, Organization, Phone, and Email Address, preceded by the text "Before taking the tour of how you can manage your ride transportation program, please register below." The right column, titled "FACTS", lists clients including Jewish Family Service of San Diego, Smiles, and Elderhelp of San Diego.

SAVE TIME & MONEY	TOUR	FACTS
<ul style="list-style-type: none">• Accessible from any web browser 24/7• Streamline client requests and scheduling• Add client information quickly• Add new rides easily• No expensive software	<p>Before taking the tour of how you can manage your ride transportation program, please register below.</p> <p>Please Register</p> <p>Name: <input type="text"/></p> <p>Organization: <input type="text"/></p> <p>Phone: <input type="text"/></p> <p>Email Address: <input type="text"/></p>	<ul style="list-style-type: none">• Clients include:Jewish Family Service of San Diego Rides & SmilesElderhelp of San Diego

- **Assisted Rides** is powerful Software as a Solution (SaaS) that requires more work but has been rewarding for Verde Valley Caregivers Coalition, which used to average 11 calls per ride. Training has been an issue, so WVCC staff gather every Wednesday over lunch to walk through the steps together on a large screen.

The payoff: powerful records that can create a compelling narrative for partners and funders. WVCC was able to show **Northern Arizona Healthcare Foundation** that they had provided rides to 8,000 medical appointments, which resonated with the health care conversion foundation. “We are interested in funding projects that cross barriers in the community,” explains **Matt Eckhoff**, who was NAHF’s donor relations officer at the time. “This made board and staff buy-in a no-brainer.”

HealthTran: Data & Partnerships Driving Change

Every year, 3.6 million people miss medical appointments for lack of a ride and resulting provider losses have been estimated at 3% to 14% of annual revenue. HealthTran has been addressing the transportation needs of older, disabled, and low-income people in rural Missouri since 2013.

HealthTran’s core offering is a tech platform that locates ride options and coordinates patient trips. When no public transit is available (which is often), HealthTran volunteer drivers fill the gaps.

Healthcare providers join by subscription (\$37.50 per month), pay a per-booking fee (\$4 per ride), and cover the cost of most rides. Subscribers are also members of HealthTran’s sponsor, the Missouri Rural Health Association. Pilot funding came from the Missouri Foundation for Health, with ongoing support from UnitedHealthcare.

Program manager **Mary Gordon** is excited about their next-generation tech platform launching in the summer of 2020, which will track riders’ age, veteran status, insurance type, disability status, mobility concerns, and whether anyone in the household receives government income benefits. “Data drives change but nobody collects enough,” she says. “For our referring providers, this is going to be zippity doo-da, very exciting.”

Perhaps most importantly, a new “volunteer station” offering will nurture volunteer driver programs statewide by offering low-cost training and mobility management technical assistance.

“Managing volunteer drivers is a colossal amount of work,” says Gordon. “Our goal is to link all the volunteer programs in Missouri.”

A New Speed Bump for Volunteers



One important message for every volunteer driver program: training, safety procedures, and risk management are a must, as is good insurance coverage. Well-run programs need protocols for on-boarding and training new drivers and new passengers, maintaining equipment, evaluating each ride, and parting ways with those who don't comply. "There are lots of ways to stay in touch with how well the drivers are doing," says **Kent Ellsworth**, "and all that has to be superb."


An important resource is [CIMA](#), which offers VIS or Volunteers Insurance Service, a special line tailored for nonprofits. It emphasizes risk management, offers training resources, and provides organizations with \$500,000 in excess liability coverage in case a volunteer driver causes an accident, all at a cost of about \$7.45 per volunteer per year, according to VIS consultant **William Henry**.

The nonprofit insurance policy sits over and above the primary coverage, which comes from the volunteer's own personal auto insurance policy. (Some nonprofits carry additional liability coverage for their building, vehicles, staff, and volunteers.)

Recently, however, nonprofits, advocates, and drivers have begun to experience issues with those personal vehicle insurance policies. The issues are not entirely new, but were exacerbated by the rise of ride-hailing services like Uber and Lyft (also called Transportation Network Companies or TNC's.)

Some volunteers drive agency-owned vehicles or accept nothing but thanks, but many use their own cars or accept mileage reimbursement, particularly in rural places where an out-of-town round trip might take all day and an entire tank of gas. 🚗 (See: [Taxing Volunteers?](#))

TNC's usually don't even operate in these areas, but some insurance agents have begun conflating modest volunteer mileage reimbursement with "livery service income" and telling customers they must upgrade to a (more expensive) commercial policy if they drive people in their car and money changes hands. Some agents suggest their customers may not be covered for accidents that occur during a volunteering trip or try to limit the number of trips a volunteer can provide.



VIS Volunteers
13 followers
[View full profile](#)


VIS VIS Volunteers
13 followers
Promoted

Volunteer drivers are facing an insurance problem.

As you might have discovered in your own nonprofit organization, the “mistaken identity” problem is that many insurance companies writing personal automobile coverage do not differentiate between a customer driving Uber and another customer who uses their vehicle for volunteer purposes.

All this, at a time when the population is aging and there is increased demand for volunteer-based transportation.

Is this something that you have seen in your nonprofit organization?



Insuring Volunteer Drivers – States Might Force Insurers’ Hand [Learn more](#)

visvolunteers.com

Consultant William Henry believes this is largely a misunderstanding on the part of local brokers, but it is raising red flags. “The last thing you want in insurance is uncertainty – it should be watertight,” he says. He points out that most policies are “silent” on the issue of volunteer driving (meaning they don’t rule it in or out), and that conditions that are not explicitly excluded in a policy are usually included (thus would be resolved in favor of the policyholder), so drivers should be covered. Unfortunately, a few policies have begun to spell out such exclusions, or refuse to give a clear answer.

A Call to Action to Protect Volunteers

AARP is among those concerned about a chilling effect on volunteers. “The lack of clear guidance from insurance agents is a big problem in most of the country,” says **Jana Lynott**, senior strategic policy advisor at AARP’s Public Policy Institute.

AARP is working with the Texas A&M Transportation Institute on a study surveying how laws in every state treat volunteer drivers with respect to insurance and liability, and plans to reach out to executives at top insurance companies for clarification.

Only a handful of states have explicit protections on the books now; a good example is Maine, where the statute reads, in part,

“An insurer may not refuse to issue motor vehicle liability insurance to an applicant solely because the applicant is a volunteer driver. An insurer may not impose a surcharge or otherwise increase the rate for a motor vehicle policy solely on the basis that the named insured, a member of the insured’s household or a person who customarily operates the insured’s vehicle is a volunteer driver.”

AARP and others believe this issue must be tackled state by state, since insurance is regulated at the state level. “We should have an advocacy push to get all states to adopt language in their state laws to clarify the situation and protect volunteer drivers,” says Lynott.

Pursuing a fifty-state solution may not be straightforward. “The problem is, no one is taking the lead nationally,” says **Carrie Diamond**, who

championed the issue at the Greater Wisconsin Agency on Aging Resources, Inc. before joining Easterseals and the National Aging and Disability Transportation Center. ([See her Wisconsin-specific fact sheet \(2018\) here.](#))

Others, including rural strategist **Allen Smart** of [PhilanthropywoRx](#), believe philanthropy can and should get involved. “A funder could be quite effective at putting together a large statewide coalition of nonprofits and perhaps churches. It’s completely apolitical and appropriate, consistent with basic community work,” he says.

The idea also resonates with funders who believe philanthropy should leverage its trusted position in the community. “There are many roles that a foundation can play besides writing checks,” says Vitalyst Health Foundation’s **C.J. Eisenbarth Hager**. “There’s power in working for an institution with a lot of money in the bank that is able to raise issues that people with less power might feel less comfortable doing. We’ve funded advocacy work at the state legislature before and this sounds like something we would seriously consider.”

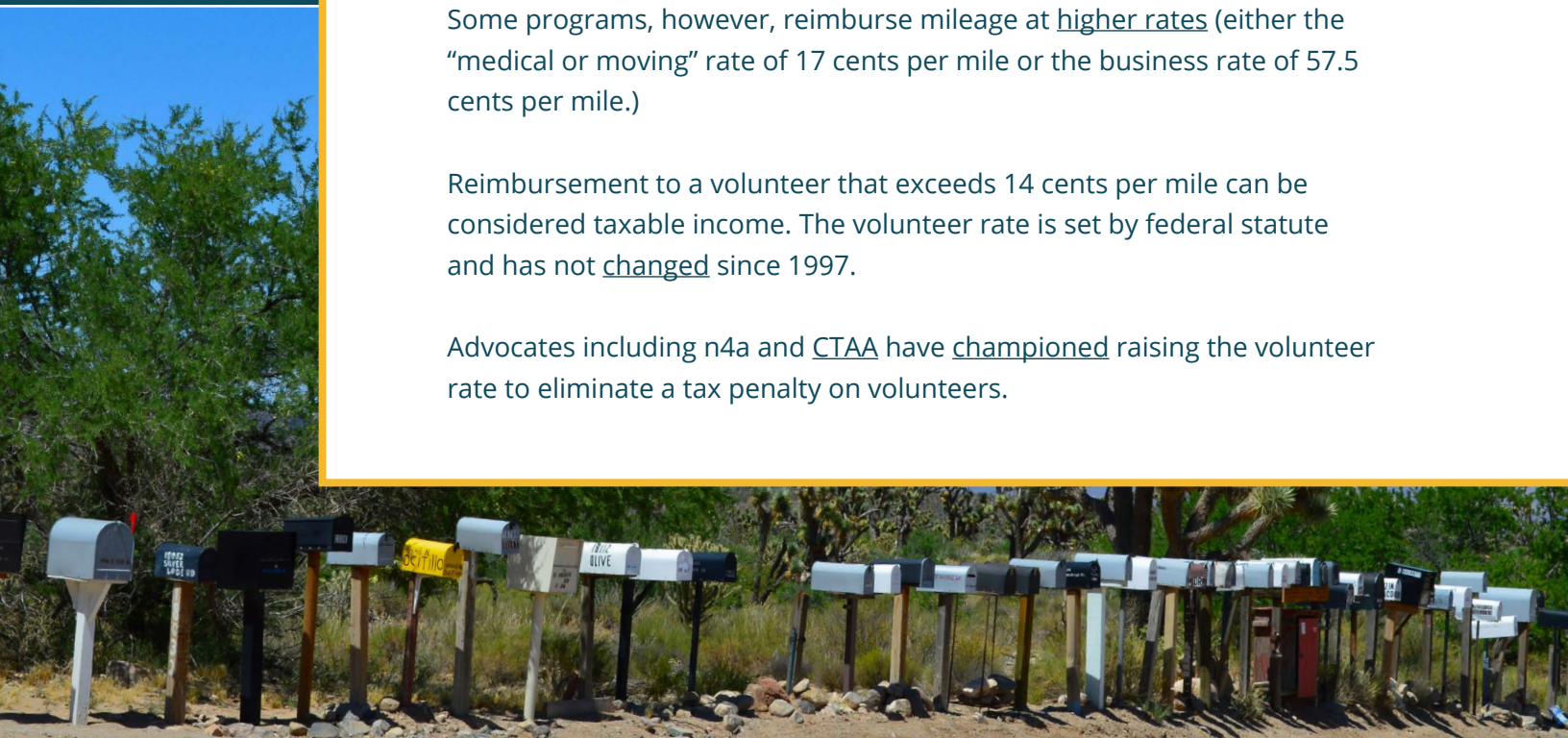
RETURN
TO TOC

Taxing Volunteers?

Reimbursement for volunteer drivers is also becoming an issue. Volunteers are typically reimbursed at the IRS-approved volunteer rate of 14 cents per mile, or they may take an equivalent tax deduction. Some programs, however, reimburse mileage at [higher rates](#) (either the “medical or moving” rate of 17 cents per mile or the business rate of 57.5 cents per mile.)

Reimbursement to a volunteer that exceeds 14 cents per mile can be considered taxable income. The volunteer rate is set by federal statute and has not [changed](#) since 1997.

Advocates including n4a and [CTAA](#) have [championed](#) raising the volunteer rate to eliminate a tax penalty on volunteers.

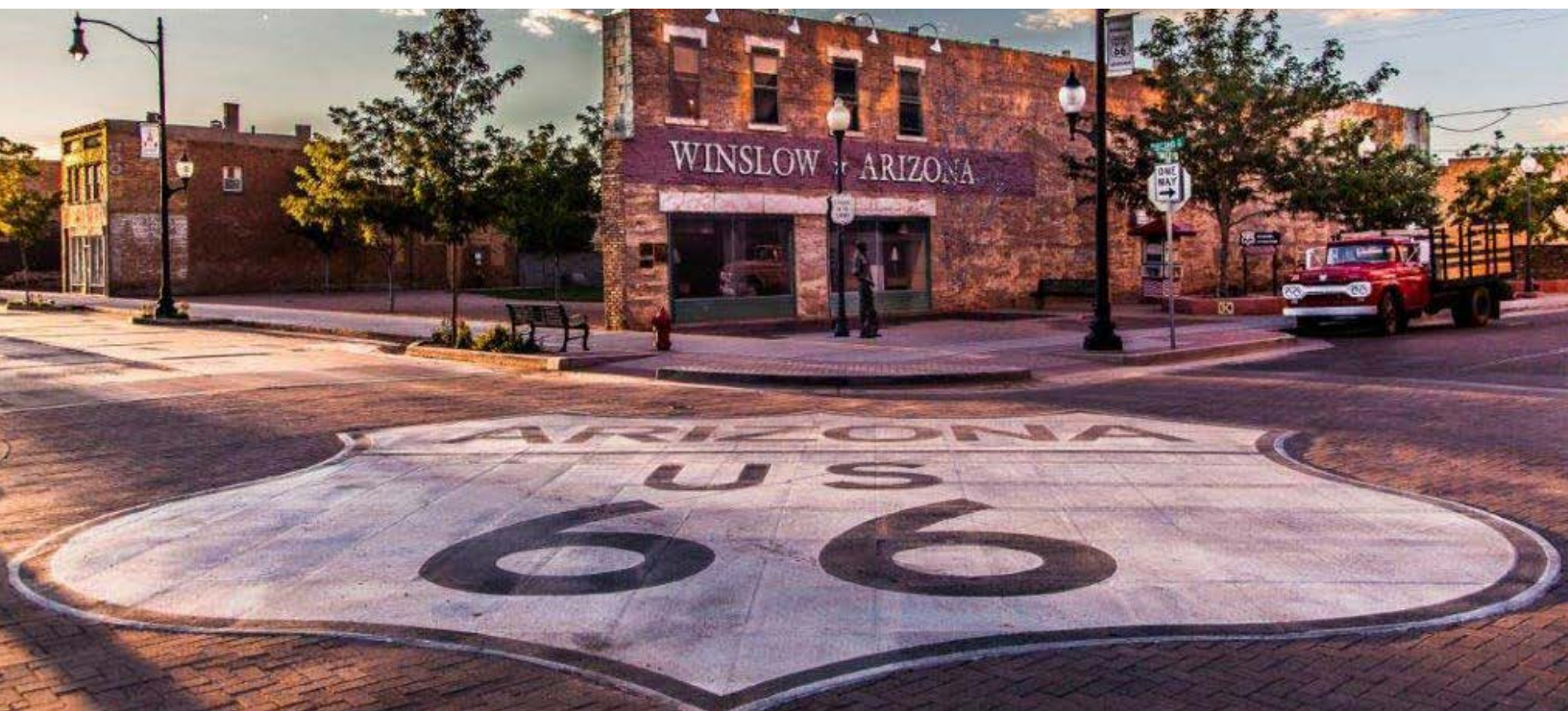


AN ARIZONA EXPERIMENT: The Rural Transportation Incubator

Creating change requires a team, which is exactly what Age Friendly Arizona's Rural Transportation Incubator (RTI) assembled. Supported by a two-year grant from the Harry and Jeannette Weinberg Foundation, the RTI brought a multi-strategy, multi-partner approach to increasing mobility for older adults living in rural Arizona.

Age Friendly Arizona is an initiative of the Maricopa Association of Governments (MAG), which is a Council of Governments, a regional planning agency, and the designated Metropolitan Planning Organization for transportation serving Maricopa County, portions of Pinal County, 27 cities and towns, and three Native nations.

Arizona presents a fascinating opportunity to examine rural issues in microcosm. About 155,000 people over 65 live in rural Arizona; one in five live alone, and one in twenty have no vehicle. Two Arizona communities have the highest concentration of older adults in the country. Because Arizona is a popular retirement destination and has many seasonal residents, older Arizonans may live far from family. Several RTI communities have residents who are very wealthy and others who are just scraping by.



While Arizona receives federal transportation formula funding, it does not assess any state tax to fund transit. As a result, a heightened need exists for nonprofit and other organizations to step in.

Much of the Rural Transportation Incubator's work in year one took place on the ground. Here are a few highlights from that community work.

Covering the First and Last Mile In Payson

Payson, Arizona (population 16,000), attractions include Tonto National Forest, two rodeos, and the Arizona State Championship Old Time Fiddlers Contest. Public transportation only started up in 2018: the Senior Express (a dial-a-ride van service that runs five hours a day, four days a week)

and the Beeline Bus (a fixed-route service, 6am to 6pm on weekdays.) Both are operated by the Payson Senior Center with FTA Section 5310 and Section 5311 transportation funds.

The dial-a-ride gets more calls than it can fulfill, but many people, particularly outside the town, find fixed-route service too hard to use. "We have people on oxygen, on walkers," says **Joanne Conlin**, board chair of Payson Senior Center. "Our drivers kept hearing, 'I love to ride the bus, but I can't walk two miles to the bus stop.'"

In transportation circles this is called a "first-mile, last-mile" problem. Payson Senior Center used its \$30,000 RTI grant to launch the Beeline Connector, a van that picks people up from home (by appointment), delivers them to the bus stop, then reverses the process. "I love that the Incubator

Photo by Payson Senior Center



grant gave us this opportunity to help people thrive,” says Conlin. “As one gentleman told me, you don’t have a whole community until the whole community is involved.”

Take It Easy in Winslow

Historic Route 66 runs through Winslow, Arizona. The Eagles made the town famous with their song “Take It Easy,” which is broadcast over a loudspeaker in the town center all day.

A tourist destination, Winslow wanted to add some public transportation but had no vehicles until 2019, when newly hired transit manager **Tim Nelson** heard about the RTI, applied, and received the \$30,000 grant that bought the town’s first van. “It’s local service only,” says Nelson. “The town is small enough we can run end to end in about half an hour.”

A retired general contractor, Nelson is hands-on: he designed the logo (which the mayor liked so much he insisted the van participate in the town Christmas parade) and sometimes drives the route himself.

Nelson thinks big. The city of Winslow has the capacity to administer FTA Section 5311 funds, and Nelson already has plans to put them to work on a fixed-route bus service and hopes eventually to add longer runs to medical services in Flagstaff, 60 miles away, and maybe all the way to Phoenix.



VICaP: A Role for Trust

Headquartered in Sierra Vista, near the Mexico border, [VICaP](#) (the Volunteer Interfaith Caregiver Program) organizes volunteer drivers to help with medical visits, shopping, and transportation, all through a dial-a-ride model. VICaP has grown over three decades and used its RTI grant to recruit volunteers and expand service even further. “The volunteers are the boots on the ground,” says executive director **Kim Burks**.

VICaP’s work is unique in the area, which created an unusual public-private opportunity. The town of Willcox, 70 miles away, couldn’t get its own volunteer program

going, so at the request of the Area Agency on Aging located within SEAGO (the Southeastern Arizona Governments Organization) and with funding from the [Legacy Foundation of Southeast Arizona](#), VICaP organized service for Willcox with two paid drivers. The original funding has ended but VICaP has been able to keep the program running.

Expansion can stress a small nonprofit, and Burks says the most helpful thing is also the hardest to find: unrestricted operating funds. “Please don’t say I can’t use it on salaries!” she explains.

Amazingly, Burks got her wish, thanks to the Community Foundation for Southern Arizona. “We have a long history serving seniors and a commitment to rural communities,” explains **Kelly Huber**, CFSA senior director of community investments. “VICaP is providing a pretty amazing service in a rural place where there is no one else, so we want to make sure they don’t go anywhere.”

CFSA started its unrestricted [CORE](#) grants program in 2017 and has granted more than \$1.5 million in general operating support to nonprofits in southern Arizona through the program. “We trust our nonprofits to know how to carry out their mission without us telling them,” says Huber, who hopes more funders will try the approach. “I think they’re going to find just as many successes, along with building more trust, creativity, and innovation from their nonprofit partners.”



Meet the Mentors

Another important aspect of the Rural Transportation Incubator is an inclusive learning community, which connected grantees to each other and to resources and advisors statewide, including a network of government mobility managers, and two mentors, Charlie Petersen and Kent Ellsworth.

Photo by
Age Friendly
Arizona



Charlie Petersen: Building Partnerships and the Freedom Express

Charlie Petersen, founder of the [Freedom Express](#) in Wickenburg, Arizona (population 6,000), believes in strong local alliances. This helped Freedom Express find an administrative home in the Foundation for Senior Living; the Salvation Army provides financial support through its Christmas

bellringing program (about \$18 thousand per year); and the town of Wickenburg leases their vehicles for them, allowing Freedom Express to share the town's gas pumps and liability insurance.

"This is a micro-transportation program that only operates in a ten-mile radius," says Petersen, who recently passed the reins to his successor, "but we've seen a lot of positive change."



Kent Ellsworth: Expert Navigator for Verde Valley Caregivers Coalition

Kent Ellsworth has guided Verde Valley to its current success, including 180 volunteer drivers that provide 30,000 trips per year, with a keen eye for strategic opportunities.



Photo by Verde Valley Caregivers Coalition

WVCC receives FTA Section 5310 funds but has decided not to apply for Section 5311 (rural-only) funds, in part because of the regulations and reporting requirements that come with them. But through astute dealmaking, Ellsworth's clients (always referred to as "neighbors") can benefit from 5311-funded paratransit service anyway.

The nearby city of Cottonwood has 5311 paratransit but can't keep its vehicles busy inside its service areas and is barred by law from driving its own clients beyond those borders. Cottonwood is allowed, however, to contract with WVCC to drive WVCC neighbors. The bureaucratic hurdles Ellsworth had to clear to arrange this are not for the faint of heart, but it worked. Cottonwood's paratransit vehicles now spend less time sitting idle, Cottonwood legally and properly applies WVCC's cash payment toward the required match on its 5311 grant, and WVCC clients get about 500 more rides per month. Win, win, win.

Partnering with Government: A Core Strategy

Numbers tell only part of the mobility story, but in its first year, the Rural Transportation Incubator grantees did something fundamental: they provided mobility services to 164 low-income older people who didn't have them before.

In addition to its community work, the RTI sought other opportunities to collaborate with government agencies, qualify for government grants and funding streams, and build networks and infrastructure:

- Hosting the *Never Too Old* conference on social determinants of health, including mobility. More than 300 leaders from Arizona's legislature and nonprofit and healthcare community attended; key partners included AARP Arizona, the Arizona Public Health Association, Arizona Department of Health Services, Experience Matters, Vitalyst Health Foundation, and Grantmakers In Aging.

- Launching AZRideInfo.com, a new resource to help older people find transportation options statewide. Now Age Friendly Arizona is exploring opportunities to expand the website service with telephone support.
- Commissioning a consultant study, *Technology Support for the Arizona Rural Transportation*, surveying programs in other states and analyzing Arizona's mobility tech environment and options. Recommendations from the report include:
 - Explore creation of a statewide technology resource center for small and rural transportation providers. A potential partner is Arizona State University's University Transportation Center.
 - Provide communities with help in choosing and making an action plan to start using the appropriate tech tools for their needs. In this spirit, in year two, the Incubator will offer grantees up to \$60,000 in funds for software, hardware, or consulting.

Double-Match: A Public-Private Success Story

The AZRideInfo.com backstory showcases some advantages of a public-private approach.

Two Arizona agencies -- MAG and CYMPO (the Central Yavapai Metropolitan Planning Organization, MAG's counterpart in Prescott) -- wanted the mobility database to become a website, but neither could afford the project alone.

MAG had the RTI grant from the Harry and Jeanette Weinberg Foundation, but that required matching funds. CYMPO had Federal Highway Administration funds through the Arizona Department of Transportation but couldn't find its required match.

The solution: "We matched each other's grants," explains Amy St. Peter. "It's a great example of using foundation funding for proof of concept, both to build the website, and to leverage government funds that sometimes go to waste without the required match."

Going forward, Age Friendly Arizona (coordinated by MAG) will keep the site running and the state's network of mobility managers will help keep the information current.

MOVING TOWARD BETTER MOBILITY: A Funder's Lens

Working in a rural setting may require funders to cast a wider net. The recommendations below are provided by experienced rural nonprofit leaders and funders, including 35 attendees at a workshop at the 2019 Grantmakers In Aging annual conference, and aim to help newcomers get the lay of the land and make the most of local strengths.

1. Start Smart

- **“Measure twice, cut once”** with a data-driven approach to program design. Many rural nonprofits know their communities intimately and know where help can be found but may have limited data on hand to inform grantwriting or planning. Funders can support or commission this work or simply do it themselves.

Good sources of quantitative data include the Census, regional planning agencies, and needs assessments performed by the local Area Agency on Aging. Critical qualitative insights can be gathered from focus groups, key informant interviews, asset mapping exercises, surveys, and even simple questionnaires.



- **Help the process along.** To achieve their larger strategic goals, funders may want to help create favorable conditions. “Many funders are hoping to support multi-issue, systemic, cross-jurisdictional work,” says **Allen Smart** of PhilanthropywoRx. “The best role for rural philanthropy when things are not naturally coming together is to step forward and try to stimulate the change or guide the planning yourself.”
- **Be a convener.** The people you want to work with may not know each other or have any reason to work together. Funders often have the standing to start a conversation or build a coalition when others can't.

2. Partner Differently. Programs stand a much better chance with a diverse range of funders and partners but building this may require some creativity.

- **Identify shared values.** Look for larger values-driven common denominators, like social justice or health equity. Groups working on age-friendly communities, social determinants of health, or social isolation may find that mobility fits their priorities; so may social service and faith-based service organizations, or congregate or home-delivered meal programs.
- **Don't overlook local for-profit institutions.** Rural healthcare frequently requires long trips to see providers, and many systems are under stress. Hospitals and cancer and dialysis centers motivated to reduce readmissions or missed appointments may make enthusiastic partners. Small town Chambers of Commerce may be interested in seeing older shoppers and diners come into town.
- **Take advantage of trends.** As healthcare reimbursement moves away from traditional fee-for-service and toward value-based or “bundled” care, many more insurers (both public and private) will need to find, or support, workable transportation options to keep their members as healthy as possible.
- **Welcome diverse partners.** The local Area Agency on Aging, the United Way, Easterseals, and even schools and nursing homes may see synergies or lend support to an aligned program.
- **Don't let labels cloud the issue.** RideConnection in Portland gathers lots of data on all rides and has been able to use that to secure support from funders that are not interested in mobility but care deeply about hunger. They now receive funding for trips from rural areas to meal programs and grocery stores. “If you live a mile from the nearest food pantry and can't drive, that's a big deal,” says manager **John Whitman**.
- **Remember government.** Public-private partnerships may provide ready-made coalitions. “Every region is federally required to have a plan to coordinate human services transportation,” points out MAG's **Amy St. Peter**. “By plugging into that group, you may find matching funds, transportation expertise, technical advice, political support, and more.”

Groups that may be unfamiliar but can be important partners include Councils of Governments (COG) and Regional Councils; Metropolitan Planning Organizations (MPO) and Regional Transportation Planning

Organizations (RTPO); state Departments of Transportation; relevant federal agencies (Federal Transit Administration); and mobility managers.

Once involved, an agency like a Council of Governments can also provide continuity. “It’s not just bringing the people together – it’s also being the bridge that keeps it going,” says **Amy St. Peter** of MAG, which plays a similar role in the Rural Transportation Incubator.

- Identify a champion. “For a funder, finding a champion you can work with can be just as important as the dollar amounts or the technology or even the power of the idea,” says **John Feather**, CEO of Grantmakers In Aging. This person doesn’t necessarily have to run the program but can be essential in forming coalitions and keeping enthusiasm high – both keys to sustainability.



3. Learn to love small. The scale of many rural nonprofits can leave funders feeling baffled. "With low population density, it's hard to get numbers that look sparkly on paper. Yet for the individuals who are helped, it's life changing," says Carol Wright Kenderdine of Easterseals.

- **Get comfortable starting small and building slowly.** Rather than starting something new, consider collaborating with an existing service, then expanding. Support adding staff, building evaluation capacity (which supports more investment), and help with board recruitment and organizational continuity. "Celebrate small successes, and do so often," recommends **Amy St. Peter**.
- **Be patient.** Rural grants may work differently, taking longer to get started and longer to use the money. What might be a six-month grant in a large suburban nonprofit might take 12 to 18 months for a small rural organization to spend.
- **Support small purchases.** Rural areas may not have cell service so drivers need radios or walkie-talkies. Gas cards to reimburse drivers are helpful. Recognition programs can boost morale and generate useful publicity at a low cost. A cloud-based scheduling program can do wonders for productivity for just a few thousand dollars per year.
- **Don't make it all about health care.** "I hope that when I can no longer drive, that a trip to see the doctor is not the only thing I can get help with," says **Helen Kerschner**, who teaches a certification course in senior transportation at UMass Boston.

4. Drive change. Closing the mobility gap will require changing the conditions that slow progress. Here are some suggestions from practitioners:

- **Fund people.** Transportation grants often go to capital purchases (e.g., a new van) but investing in new staff, training, and technical assistance can have more impact. Scholarships to attend conferences and trainings by the Rural Transit Assistance Program or the National Transit Institute or funding for webinars, conference calls, peer counseling, and one-on-one consultation can help. Such investments do double duty, as hiring also stimulates community economic development.
- **Widen your evaluation lens.** Every funder (and board) is interested in a return on investment, often by captured by metrics like number of rides provided. These can be powerful: Verde Valley Caregivers Coalition, which surveys all new riders, found that 83% had missed one or more healthcare

appointments in the prior year. Four months later, 97% reported attending all appointments. In a rural setting, however, help with choosing and acquiring the technology or system for doing the counting may be needed.

Qualitative data may also be valid, from surveys examining improvement in clients' feelings of isolation or depression to powerful testimonials and simple statements of gratitude.

- **Embrace more roles.** Money is clearly important but funders can be helpful to small and rural communities in ways beyond check writing, including advocacy for relief of legal, regulatory, or tax burdens 🟡 (See: [A New Speed Bump for Volunteers](#)); communications support, spreading the word about program ideas and successes; and research.
- **Build the evidence base you want.** Collecting big-picture data on mobility can be difficult because programs are so decentralized. Nonprofit mobility leader **Valerie Lefler** believes it's time to build the evidence base for the benefits of reliable transportation.

"If I could wave a wand, I would like to see a program that studies transportation as if it were an intervention, like a clinical trial," she says. "Take 300 rural folks with transportation barriers and intervene with a stipend, voucher, or some way to guarantee them the rides they need for a year. Do a before-and-after, and measure changes in their physical and mental health, levels of employment, and hope for the future. I believe the positive impact on their social determinants of health would be profoundly eye-opening."

RETURN
TO TOC



Afterword:

Mobility and COVID-19

COVID-19 has taken a cruel toll on older adults and some of the mobility nonprofits that assist them. People worried about the virus or subject to shelter-at-home orders began to hunker down and avoid travel, volunteers were afraid to drive, ridership and donations suffered, and unmet basic needs like healthcare and nutrition spiked.

In Arizona, nonprofits pivoted quickly, including Payson Senior Center, which turned its bus service into a Meals on Wheels delivery service for people who could no longer travel to congregate meals.

Philanthropy has also stepped up. Like many other funders, the Harry and Jeannette Weinberg Foundation relaxed grant conditions to allow Rural Transportation Incubator grantees to use funds in the best way

for current conditions. “Unexpected things will always happen, and we learned and adapted, but the fact that funding was unrestricted in this critical moment was very helpful,” says **Amy St. Peter**.

The crisis has also stimulated innovation. Less mobility drove up social isolation but Verde Valley Caregivers Coalition had an answer. In addition to grocery shopping for 191 neighbors and continuing to provide medically necessary rides, WVCC [enlisted](#) 12 members of the Northern Arizona Retired Nurses In Action, who made phone calls offering advice and reassurance to more than 800 neighbors.

Stacey Easterling, vice president of programs at Virginia G. Piper Charitable Trust, believes the crisis offers an opportunity for funders who seek to champion aging. “We’ve all experienced some isolation from the coronavirus, and that may be creating more empathy for the isolation that many older adults face all the time,” she says. “Now funders in aging have the chance to put that empathy to work; this can also further inform and strengthen our advocacy efforts.”



Photo by Verde Valley Caregivers Coalition



About the Harry and Jeanette Weinberg Foundation

The Harry and Jeanette Weinberg Foundation, one of the largest private charitable foundations in the United States, is dedicated to meeting the basic needs of people experiencing poverty. In 2020, the Foundation will provide approximately \$130 million in total grant activity supporting nonprofits that provide direct services in the areas of Housing, Health, Jobs, Education, and Community Services. The Foundation's priority communities include Baltimore, Chicago, Hawaii, Israel, New York City, Northeastern Pennsylvania, San Francisco, and Rural Communities (primarily rural areas within proximity to priority communities.) For more information, please visit hjweinbergfoundation.org.

About the May and Stanley Smith Charitable Trust

Created in 1989, the Trust stewards the charitable intentions of May and Stanley Smith beyond their lifetimes. The Trust's 2019-2023 Strategic Plan aims to focus, deepen, and enhance our efforts to achieve significant, lasting, positive changes that promote well-being for individuals and communities. Learn more at smithct.org.

About Age Friendly Arizona

Age Friendly Arizona is a partnership hosted by the Maricopa Association of Governments, a regional planning agency serving the Greater Phoenix area. We are committed to ensuring every person can live a fulfilled life at any age, connected to family, friends, and community. Older adults should be able to live with dignity, make their own choices, and participate fully in society. Learn more at www.agefriendlyaz.org.

About Maricopa Association of Governments (MAG)

The Maricopa Association of Governments (MAG) is a Council of Governments (COG) that serves as the regional planning and policy agency for the metropolitan Phoenix area. MAG conducts extensive applied research that is fundamental to its core mission of strengthening the Greater Phoenix region and State of Arizona. MAG serves a region of more than four million people. Learn more at www.azmag.gov.

About Grantmakers In Aging (GIA)

Grantmakers In Aging - a national membership organization of philanthropies - acts as a relevant and responsive network, resource, and champion, amplifying the voices of older people and issues of aging. Believing a society which is better for older adults is better for people of all ages, GIA seeks a just and inclusive world where older people are fully valued, recognized, and engaged in ways that matter. Learn more at www.GIAging.org.

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