INTRODUCTION

This Environmental Scan was prepared by Up & Coming Consulting in order to provide relevant information to the Senior Transportation Connection's Strategic Planning Committee. Though no Environmental Scan is ever perfectly complete, the trends represented within should provide additional information to the Committee Members that will assist them in the committee deliberation phase of the strategic planning process. It is recognized that the world is changing more rapidly than usual, and some of the bullet points may already be outdated by the time they are read; this is especially true for the trends in the Economics section. Also, there are several times throughout the scan where similar information appears in multiple sections. This was done intentionally, so that each section would be complete in and of itself, with attention given to limiting redundancy. The Strategic Planning Committee should view this document as an aid in determining the opportunities and threats that are present in the external environment.

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SENIOR TRANSPORTATION

1. **Demand for senior transportation will increase as the baby boomers age.**
   - A December, 2007 article in *USA Today*, “Senior Transportation a Growing Concern”, stated, “As the oldest of the nation's 79 million baby boomers turn 61 this year, the specter of aging and its consequences loom large” (Nasser, 2007).
   - “The number of senior citizens is expected to double by 2030. As that population swells, experts said, so will the need for new ways to get around as more people live well beyond the age when they quit driving. A 2002 study by the National Institute on Aging found that about 600,000 people who are 70 or older stop driving every year and become dependent on other forms of transportation (Kunkle, 2007).
   - “With 20 percent of the U.S. population expected to be age 65 by 2030, the need for accessible, affordable, reliable, safe and barrier-free transportation for older adults is growing” (National Center on Senior Transportation, 2008).
   - “The more than 30 million senior drivers aged 65 or older on the road today (National Highway Traffic Safety Administration) must now or will soon need to acknowledge physical limitations that will cause them to reduce their driving or seek alternative transportation altogether” (ITNAmerica, 2008).

2. **Demand for senior transportation is increasing as people are living longer, more active lives than previous generations.**
   - A May 2007 article in *USA Today* states, “‘The average man will outlive his driving ability by six years, the average woman by 10 years,’ says Rose Sheridan of the American Public Transport Association, a Washington-based group that represents public transit systems.” The author continues, “With medical advancements helping people live longer, analysts say, those numbers will continue to grow. From now until 2030, U.S. Census projections show, the number of people 85 and older will grow 73%, to 9.6 million” (DeBarros, 2007).
   - “‘Today’s older Americans are among the most active and community-engaged seniors in our nation’s history, and mobility and independence are essential to preserve those great qualities,’ said ITNAmerica Founder and President, Katherine Freund. Today, people remain active and independent into their eighties and beyond, and outlive their decision to stop driving by as much as a decade. That’s too long to depend on favors, even from family” (ITNAmerica, 2008).
   - “Older adults of the future are likely to travel more than the generation before them, and more travel options will be needed for those with mobility or income limitations” (National Center on Senior Transportation, 2008).

3. **Transportation is a growing concern among the elderly.**
   - “The importance to older adults of community-based transportation options was confirmed during the 2005 White House Conference on Aging. At the conclusion of the conference, transportation was selected as one of the top three priorities in terms of issues of daily life for older adults. Mobility options are essential for older adults to move freely about their communities even after they are no longer able to drive” (National Center on Senior Transportation, 2008)

- The National Association of Area Agencies on Aging states, "According to a survey released by the American Public Transportation Association nearly all respondents (98%) age 65 or older said that maintaining their independence is 'extremely important,' and four out of five (82%) worry that they will be stranded and unable to get around when they can no longer drive." "Today the Eldercare Locator, a public service of the U.S. Administration on Aging, launched its fifth annual 'Home for the Holidays' campaign to encourage families to learn about and discuss transportation options during this holiday season" (National Association of Area Agencies on Aging, 2008).
- "As America ages, seniors and their families are identifying transportation and driving safety as among their top growing concerns today" (ITNAmerica, 2008).

4. **Increasing attention is being paid to the driving abilities of older Americans.**
   - A 2007 article in *USA Today*, in reference to a fatal accident that was caused by a senior driver, states, "The crash was emblematic of what health and safety analysts say is likely to be an increasing problem as the elderly population booms: aging drivers, clinging to the independence that cars give them but losing their ability to operate the vehicles, causing more accidents. Fatality rates for drivers begin to climb after age 65, according to a recent study by Carnegie Mellon University in Pittsburgh and the AAA Foundation for Traffic Safety, based on data from 1999-2004. From ages 75 to 84, the rate of about three deaths per 100 million miles driven is equal to the death rate of teenage drivers. For drivers 85 and older, the fatality rate skyrockets to nearly four times higher than that for teens. The numbers are particularly daunting at a time when the U.S. Census Bureau projects there will be 9.6 million people 85 and older by 2030, up 73% from today. Road safety analysts predict that by 2030, when all baby boomers are at least 65, they will be responsible for 25% of all fatal crashes. In 2005, 11% of fatal crashes involved drivers that old. Debates over how to prepare for a boom in elderly drivers are resonating in statehouses across the nation — including Texas, where Bolka's death has inspired the Legislature to pass a measure that could lead to more frequent vision tests and behind-the-wheel exams for drivers 79 and older" (DeBarros & Davis, 2007)
   - The following excerpt is from a 2008 research study conducted at the University of Alabama looking at the effectiveness of a state law requiring vision tests for all drivers 80 years or older. Fatality crash rates were compared for three years prior to the law and three years after. The researchers found that "From 2001 to 2006, there was a nonsignificant increase in Motor Vehicle Crash (MVC) fatality rates in Florida; in contrast, fatality rates among drivers 80 years and older demonstrated a significant downward linear trend. When comparing prelaw (2001-2003) and postlaw (2004-2006) periods, the fatality rate among all-aged occupants increased by 6%; conversely, fatalities among drivers 80 years and older decreased significantly by 17%. Conclusions: Despite little evidence for an association between visual acuity and MVC involvement, the results of this study suggest that a vision screening law targeting Floridians 80 years and older resulted in a reduction in the MVC fatality rate among such drivers. The exact mechanism responsible for this association is unclear and future research should attempt to identify what might explain this relationship" (McGwin, et.al, 2008).
   - "More than half of the states have implemented licensing requirements for older drivers that are more stringent than requirements for younger drivers, but states' assessment practices are not comprehensive. For example, these practices primarily involve more

- An editorial in the *Boston Globe* sums up the issue, stating, "Recent crashes involving older drivers are starting to embolden state legislators, whose political instincts usually tell them to steer clear of anything that antagonizes this important voting bloc. But the possibility of hurting the feelings of elderly voters pales in comparison with the pain and damage they and their victims can suffer when driving skills decline to dangerous levels. In 2006, deadly crashes involving 16- and 17-year-old drivers motivated lawmakers to require increases in the driver training needed to secure a junior operator's license in Massachusetts. Yet the elderly continue to drive under Beacon Hill's radar. The problem is most acute for drivers over the age of 75 - the only group with higher driver fatality rates than 16-year-olds, according to the US Department of Transportation" (Globe Editorial, 2008).

5. Costs of providing transportation are increasing.

- As reported in *Crain's Cleveland Business*, "GCRTA's fuel costs have gone from $4.1 million in 2002 to what is projected to be $24 million in 2008" (Tucker, 2008).
- "Of all the public services touched by fluctuating fuel prices, transportation for seniors who can no longer drive has been among the hardest hit. Increases to gas prices and the needs of the nation's growing senior population have far outpaced public funding for programs such as special bus or van services, creating what some experts say is a burgeoning crisis. 'At a time when we really need to be expanding services, rising gas prices are impeding efforts because it's doubling or tripling the cost [of service] in some areas,' said Mary Leary, senior director for the National Center on Senior Transportation. More than half the groups in the Area Agencies on Aging, a loose national network of publicly funded social-services groups, have scaled back on transportation programs for seniors, according to a recent survey by an agency advocacy group" (Kim, 2008).
- A 2006 study of 59 Area Agencies on Aging in New York State saw significant increases in costs. "Comparing data from a 2001 survey to the 2006 survey showed how cost per vehicle has grown. Driver's salary has increased $10,500 or 70%, insurance has increased $2,332 or 97%, fuel has increased $1,754 or 75% and maintenance has increased $876 or 52%. Besides these factors, service providers spend money on many other transportation needs such as: parking inspection, AAA, tolls, tickets, cleaning, registration, oil changes, uniforms, cell phones, administrative costs" (Coppola, 2006).
- "This survey [111 respondents] confirms that American Public Transportation Association member agencies are experiencing a rapid increase in fuel and electricity prices affecting agency budgets, fare policies, operations, and fuel purchasing strategies. The survey results indicate a distinct difference in cost escalation between diesel fuel and electricity. While diesel prices have almost tripled in just four years, electricity prices have increased less than 20 percent. Agencies relying more heavily on diesel to power public transportation vehicles, most often bus operators, are likely facing the most

immediate and substantial effects on operating budgets" (American Public Transportation Association, 2008).

6. **The future state of funding for public transportation is unknown.**
   - "Sherrod Brown is a cosponsor of the 'Saving Energy through Public Transportation Act' (S. 3380), which would provide $1.7 billon to meet the nation's demand for mass transit. This legislation would promote increased public transportation use and encourage alternative fuel use in mass transit. Companion legislation passed the House of Representatives in June. Ohio stands to benefit from more than $44 million in funds under this legislation. The funds could be used to reduce mass transit fares, promote alternative fuel use, and improve the accessibility of public transportation. The bill would provide Ohio with $36 million for urban areas and $7.7 million for rural areas" (Office of Sherrod Brown, 2008).
   - An October 2008 article in *The Plain Dealer* states, in regards to proposed drastic cuts, that the "GCRTA was able to reduce the fare increase and cancel most of the service cuts after the Northeast Ohio Areawide Coordinating Agency, on Gov. Ted Strickland's initiative, shifted $9 million in unspent federal money to RTA" (Farkas, 2008).
   - "In the last six years of Gov. Bob Taft's administration, the public transit subsidy was slashed from a total of $43 million (for 60 systems) to just $16 million" (Tucker, 2008).
   - As presented by All Aboard Ohio at City Hall in Lakewood in July 2008, "In Ohio, state funding for public transit declined by over 63% from 2001 to 2007." "Many States increased transit funding: Kentucky +175%; Pennsylvania +40%; Michigan +63%; West Virginia +48%. Ohio cut 43% since 2002 to $26.2 million, Governor added Congestion Mitigation and Air Quality funds in 2008-2009" (Sislak, 2008).
   - Individual providers are also feeling the pinch. "The Loudoun County [Virginia] chapter of the American Red Cross has ended a program that gave seniors, veterans and disabled residents free rides to medical appointments, one of several cutbacks prompted by waning donations and the worsening economy" (Mummolo, 2008). "The Morris Area [Northern New Jersey] Paratransit System, which gives up to 6,000 rides a month to senior citizens and people with disabilities, is facing a $170,000 reduction in aid, according to its director, Hope Hezell" (Remaly, 2008).

7. **Transportation fares are increasing.**
   - An October 14th, 2008 article in *The Plain Dealer* states, "New fares ranging from a 10-cent one-way increase for senior citizens to $15 more for a monthly park-and-ride pass go into effect Oct. 27. Cash fares to ride the bus or rapid will go up 25 cents to $2. The current $1 fare for the community circulators also will increase by a quarter. The Greater Cleveland Regional Transit Authority board approved the fares Tuesday. The move is expected to bring in $4.8 million a year for the transit authority. RTA officials call the increases a fuel surcharge, imposed because of the rising cost of diesel. These higher fares are expected to continue until September 2009. The surcharge could be eliminated if the cost of diesel drops below $3 a gallon or if additional state money is provided. However, it could go up if fuel costs keep rising" (Farkas, 2008).
   - Results from 2008 a survey by the American Public Transportation Association finds, "Agencies are responding with increased fares, delayed service improvements, deferred capital investments, additional funding from state and local sources and in some cases,

service cuts. At the same time, nearly all agencies are experiencing increases in ridership. Increased fare revenue is unable to generate sufficient revenue to offset increases in fuel costs and transit agencies have had to take budgetary actions over time, including fare increases and service adjustments" (American Public Transportation Association, 2008).

- An October 16th, 2008 press release from Sherrod Brown states, "As many Ohio mass transit fares increase to account for higher fuel costs, Brown today announced his support for legislation to bolster support for public transportation. "With rising fuel prices, more Ohioans are turning to public transportation," said Brown. "Yet mass transit systems are struggling to maintain service due to higher fuel costs. We need to make public transportation affordable and accessible" (Office of Sherrod Brown, 2008).

8. There is an increasing focus on coordination among entities concerned with senior transportation.

- "The development, implementation, and maintenance of responsive, comprehensive, coordinated community transportation systems is essential for persons with disabilities, person with low incomes, and older adults who rely on such transportation to fully participate in their communities," stated President George W. Bush in his Executive Order on Human Service Transportation Coordination in 2004 (Bush, 2004).
- "Coordinating individual human service transportation programs makes the most efficient use of limited transportation resources by avoiding duplication caused by overlapping individual program efforts and encouraging the use and sharing of existing community resources. In communities where coordination is made a priority, citizens benefit from more extensive service, lower costs and easier access to transportation. Coordination can improve overall mobility within a community, particularly when human service agencies are each providing transportation to their own clients. It works by eliminating the inefficiencies within disparate operations and service patterns that often result from a multiplicity of providers. Greater efficiency helps to stretch the limited (and often insufficient) funding and personnel resources of these agencies. When appropriately applied, coordination can lead to significant reductions of operating costs (per trip) for transportation providers. People in need of transportation also profit from enhanced transportation and higher quality services when operations are coordinated" (Transportation Coordinating Council on Access and Mobility, 2006).
- "Liberty Mutual, the eighth largest car and home insurer in the U.S., and The Independent Transportation Network (ITNAmerica), the first and only national, non-profit transportation network for America's aging population, have joined forces to help keep senior drivers safe on our roads. The new partnership addresses this growing national concern with resources for seniors and their families seeking practical, affordable and dignified mobility solutions, ITNAmerica offers rides in private automobiles, 24/7 to seniors and people with vision problems. ITNAmerica is based in Portland, Maine, with affiliates now in 10 communities across the country" "Just as ITN unites older people with their communities, ITNAmerica unites communities across the country. Our proprietary ITNRides software system enables us to leverage our expertise and to simplify operations for all our affiliates. It connects every ITN affiliate community into one effective centralized national network that manages the logistics of the senior transportation service, including member and volunteer management and ride

scheduling." "And with 40 affiliates expected by 2010, ITN is quickly linking cities and citizens across the country. And that's just the beginning. Soon, ITN will grow beyond the cities and suburbs to the small towns and rural communities where the unmet need is so great. Our goal is to provide the expertise, tools and state-of-the-art technology that will allow small organizations to serve more and more people without additional resources or funds" (ITNAmerica, 2008).

- "Community leaders, transit and public service providers who seek to improve transportation options in their regions need the Federal Transit Administration, United We Ride's self-assessment tool Framework for Action: Building the Fully Coordinated Transportation System. Coordinated transportation strategies, as described in the resource, bring together key players in the community to pool resources and work together for more effective and efficient solutions. You can download the self assessment tool from United We Ride's Web site" (National Center on Senior Transportation, 2008).
- "Government Accountability Office is recommending that the Secretary of Transportation direct the Federal Highway Administration and National Highway Transportation Safety Administration to implement a mechanism to allow states to share information on older driver safety practices" (Government Accountability Office, 2007).
- The National Center on Senior Transportation, as described by Eldercare is "The nation's go-to resource for senior transportation information, research, and development is administered by Easter Seals, Inc. in partnership with the National Association of Area Agencies on Aging (n4a), through a cooperative agreement with the U.S. Department of Transportation, Federal Transit Administration, and with guidance from the U.S. Administration on Aging" (Eldercare, 2008).

9. **There are several entities addressing best practices for senior transportation.**
   - National Center on Senior Transportation
     - The National Center on Senior Transportation is funded through a cooperative agreement with the U.S. Department of Transportation, Federal Transit Administration and with guidance from the U.S. Administration on Aging. NCST is administered by Easter Seals Inc. in partnership with the National Association of Area Agencies on Aging (n4a). Our mission is to increase transportation options for older adults and enhance their ability to live more independently within their communities throughout the United States.
     - A major objective of the National Center on Senior Transportation is the development of resources needed to build and enhance the kinds of transportation options that will allow older adults to age independently in the communities of their choice. The NCST serves to share books, reports, brochures, curricula and other multimedia products of interest to the transit community.
   - The Beverly Foundation
     - "The Beverly Foundation's research efforts have resulted in a number of reports that explore vital issues of senior transportation in depth. Subjects include transportation options, STPs (Supplemental Transportation Programs for seniors), volunteer driving, Focus Groups, and community transportation. These research reports include statistics prepared from STAR Search Surveys, and present a wide variety of quantitative and qualitative data.

    - Recent Reports: Impact of Rising Fuel Costs on Volunteer Driver Programs (2008); Public Transportation Programs for Seniors (2007); Transportation Innovations for Seniors: A Report From Rural America (2007); Synopsis of Transportation Innovations for Seniors: A Report From Rural America (2006); Door-through-door Transportation Services For Seniors (2005).
    - Studies undertaken by the Beverly Foundation have resulted in an understanding of what seniors and their concerned family and friends believe are effective, usable transportation alternatives.
        - The 5 A's of Senior Friendly Transportation (http://seniordrivers.org/STPs/providers.cfm?button=fiveAs)
        - **Availability:** Transportation exists and is available when needed (e.g., transportation is at hand, evenings and/or weekends).
        - **Accessibility:** Transportation can be reached and used (e.g., bus stairs can be negotiated; bus seats are high enough; van comes to the door; bus stop is reachable).
        - **Acceptability:** Deals with standards relating to conditions such as cleanliness (e.g., the bus is not dirty); safety (e.g., bus stops are located in safe areas); and user-friendliness (e.g., transit operators are courteous and helpful).
        - **Affordability:** Deals with costs (e.g., fees are affordable; fees are comparable to or less than driving a car; vouchers or coupons help defray out-of-pocket expenses).
        - **Adaptability:** Transportation can be modified or adjusted to meet special needs (e.g., wheelchair can be accommodated; trip chaining is possible)
- University of Michigan, Transportation Research Institute
    - Researchers have recently published Promising Approaches to Promoting Lifelong Mobility (http://deepblue.lib.umich.edu/bitstream/2027.42/60921/1/101054.pdf)
- Coordinating Agency on Access and Mobility, www.unitedweride.gov
    - "United We Ride is an interagency Federal national initiative that supports States and their localities in developing coordinated human service delivery systems. In addition to State coordination grants, United We Ride provides State and local agencies a transportation-coordination and planning self-assessment tool, help along the way, technical assistance, and other resources to help their communities succeed.
    - The CCAM has launched the Useful Practices application to serve as the central information resource on useful strategies to increase efficiency, simplify access, and reduce duplication for social service providers, transportation providers, and service users. If you are a community, organization, or agency interested in sharing information about your program or project, please review the elements of criteria and the practice types to verify that your project is an appropriate case study for this website; these definitions will also help you fill in the forms. When you are ready, please go to the Submit New button of the site. The Useful Practice case study information will be reviewed by the CCAM and will be made available to other practitioners as well as the general public to Search Records, review projects, and potentially implement similar programs" (Transportation Coordinating Council on Access and Mobility, 2008).
- Community Transportation Association of America
    - CTAA is developing a matrix of technological solutions for improving transportation for older adults based on a scan of needs, prototypes and best practices to guide additional work and NCST content. Local transit agencies will

find this tool helpful in upgrading their transit systems to be more accessible for their customers.

- A toolkit of the Community Transportation Association of America, titled Senior Transportation: Toolkit and Best Practices, provides information about the varied transportation needs of older people, how community and public transportation providers are meeting those needs, and means and resources for improving and creating senior transportation service. Visit CTAA's Web site to download the toolkit and learn more about other CTAA resources. (http://web1.ctaa.org)

10. Organizations that are developing and implementing unique models of service delivery have additional funds available to them.

- "The transportation legislation known as SAFETEA-LU offers support and incentives for new services and alternatives that reach beyond the Americans with Disabilities Act" (National Center on Senior Transportation, 2008).
- "FHWA also provides federal highway funding that states may use to implement projects that address older driver safety. While older driver safety projects are eligible for federal highway funding, state DOTs generally place a higher priority on and commit more of their limited resources to other projects—such as railway/highway intersection safety projects, roadside hazard elimination or mitigation projects, road intersection safety projects, and roadway departure projects—that more broadly affect all drivers. Although older driver safety is not the primary focus of these projects, the projects may incorporate FHWA's recommended practices to improve older driver safety" (Government Accountability Office, 2007).
- An RFP dated November 15th, 2008 reads, "Funding in the amount of $1.5 million is provided by Federal Transit Administration to support grants ranging up to $300,000 each. These grants are intended to assist States and tribal associations in supporting the development of transportation coordination capabilities and capacity within local or regional human service networks to address the individualized customer transportation needs of persons and families with low income, persons with disabilities, older adults and youth. Specifically, these grants seek to address individual customer needs for mobility within workforce development, health care, aging, youth, disability, education, housing, veterans and other social service or human service support networks. State or tribal mobility management proposals may include the development of educational programs, training and technical assistance activities, and mobility management coordination pilots for or within such networks" (TCM News, 2008).
- In November 2008, The National Center on Senior Transportation awarded grants and technical assistance to eleven community organizations to help increase and improve transportation services for older adults in their communities. Awardees were selected based on the development and implementation of innovative approaches to increasing senior transportation options and improving older adult mobility. "Each project was awarded $10,000 and four months of tailored technical assistance. The eleven projects are described below and are representative of the wide variety of senior transportation models in the country and are included in this document to showcase the wide variety of senior transportation models in the country:
  - The Alamo Area Council of Governments (San Antonio, TX) is working in partnership with the Northeast Senior Assistance Co-op, the Well-Med Foundation, Catholic Charities and the San Antonio

Senior Transportation Committee to create infrastructure to start a volunteer driver program. They plan on serving 10-15 older adults during the grant period.

- Catholic Charities of Herkimer County (Ilion, NY) will increase the volume of their RIDE Program through an “Adopt a Driver Program”. Local businesses will sponsor drivers by purchasing magnetic automobile place cards to place on volunteer drivers’ cars. They will increase the amount of volunteer drivers participating in the program by 10 and be able to serve an additional 80 more clients.
- Goodwill Easter Seals Miami Valley (Dayton, OH) will use the Technical Assistance Grant to start a volunteer based transportation program for seniors. They will hire a project supervisor and coordinator to create and purchase marketing materials, recruit drivers, secure additional funding, arrange driver training and orientation and manage the program.
- The Jewish Family Services of San Diego (San Diego, CA) will utilize staff time and new marketing materials to promote and increase service areas for existing transportation programs that serve seniors. These services include a shuttle service and a large volunteer-based transportation service.
- The Jewish Federation of Greater Atlanta (Atlanta, GA) will help adults in Georgia age in place. This project includes three components: recruiting and utilizing volunteer drivers; enhancing older driving via established avenues of educational programs such as the AARP safe driving courses; and, where appropriate, helping older adults transitioning from driving to other modes of transportation.
- Larimer County (Fort Collins, CO) will use the Technical Assistance Grant to develop policies and procedures to implement a new service to a rural part of the county. The county will work collaboratively with the local metropolitan planning organization to develop a marketing plan to promote the new transportation services to older adults in the targeted region.
- The Mahube Community Council, Inc. (Detroit Lakes, MN) will provide assistive transportation services to 20 older adults on a monthly basis during the grant period through a volunteer transportation program. Volunteers will be reimbursed for their mileage. They will also enhance and expand marketing efforts for the county transit services by distributing brochures, schedules, and phone numbers to sites where seniors gather.
- Monterey-Salinas Transit (Monterey, CA) will operate a pilot program using a taxi voucher program to connect seniors to fixed bus routes. Group and individual travel training will be provided to seniors participating in the program. They plan on providing 480 trips during the grant period.
- Rutherford LIFEServices, Inc. (Spindale, NC) will work with the faith community to use church vehicles to transport seniors to adult day centers and medical services. An outreach coordinator will identify and train four volunteers to advocate for seniors and assist with transportation needs for seniors in the community.
- Sonoma County Human Services (Santa Rosa, CA) will coordinate the efforts of community based agencies to recruit, train, and manage volunteer driver programs in underserved rural areas. They will develop and implement a marketing plan, protocols and enrollment forms, and a scheduling system to recruit, and utilize volunteer drivers.
- St. Lawrence County (Canton, NY) will use the additional funds from the NCST Technical Assistance Grant to continue their efforts to provide transportation services for underserved rural seniors. They will provide an additional seven trips from senior housing to the farmers market, support a senior bus program and produce and distribute senior friendly bus schedules. Also, marketing materials will be designed and produced to promote the existing and new public transit route to older adults” (National Center on Senior Transportation, 2008).

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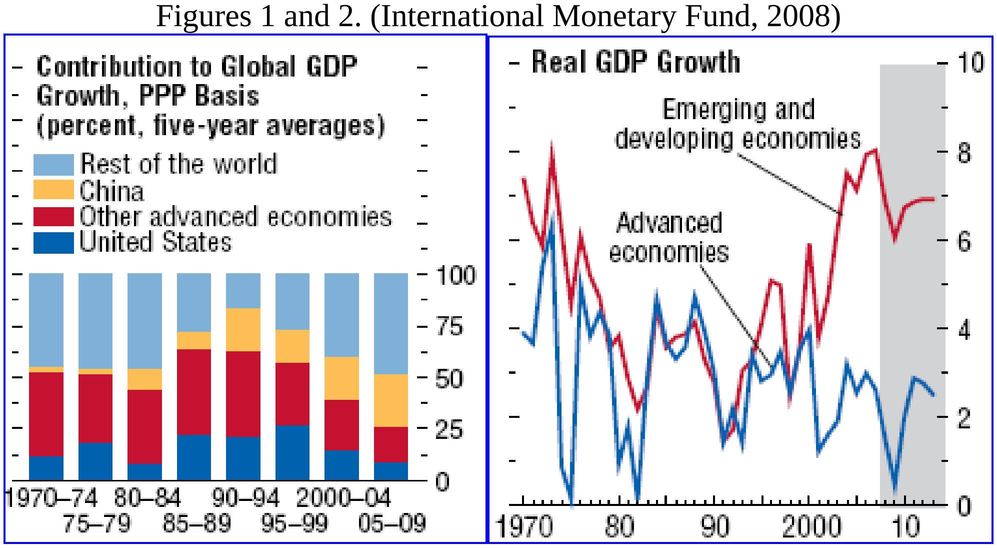
Economic

1. **The global economy is under major stress.**
   - "The financial crisis that erupted in August 2007 after the collapse of the U.S. subprime mortgage market entered a tumultuous new phase in September 2008 that has badly shaken confidence in global financial institutions and markets. Most dramatically, intensifying solvency concerns have triggered a cascading series of bankruptcies, forced mergers, and public interventions in the United States and Western Europe, which has resulted in a drastic reshaping of the financial landscape. Moreover, interbank markets have virtually locked up as trust in counterparties has evaporated" (International Monetary Fund, 2008).
   - "Russia Weakens Ruble to Fight Drain on Cash Reserves…Russian authorities, under growing pressure from the global financial crisis, signaled a softening in their once-staunch defense on the ruble's exchange rate" (White & Kelly, 2008).
   - "Pound's Fall Fails to Give Expected Lift to British Exports…the fast-sinking pound has so far failed to fuel growth in British exports, depriving the economy of the stimulus that a falling currency has triggered in the past" (MacDonald, 2008).
   - "The advanced economies grew at a collective annualized rate of only 1 percent during the period from the fourth quarter of 2007 through the second quarter of 2008, down from 2½ percent during the first three quarters of 2007" (International Monetary Fund, 2008).
   - As seen in the graphs below, there has been a collective decline in advanced economies' contribution to Global GDP.

Figures 1 and 2. (International Monetary Fund, 2008)

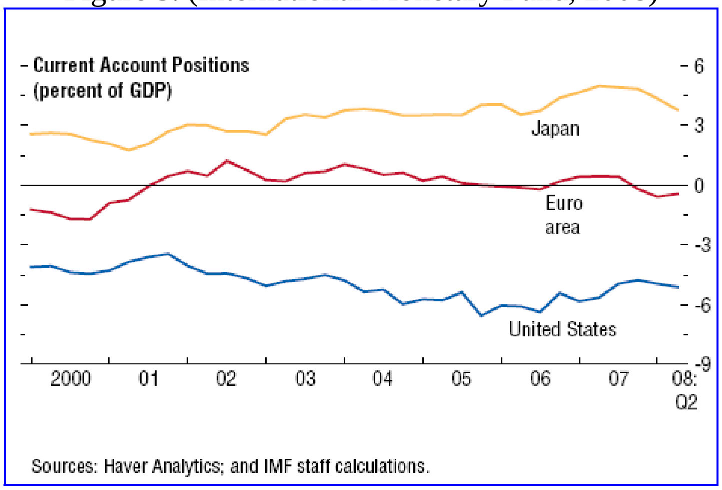


2. **The United States' economy is increasingly tenuous.**
   - "The weakening of U.S. growth relative to its trading partners and the sustained depreciation of the U.S. dollar since 2002 helped lower the U.S. current account deficit to 5 percent of GDP in the first half of 2008, from 6½ percent in late 2005. The decrease is

even larger if net oil imports are excluded. Despite some strengthening since early 2008, the real effective exchange rate of the U.S. dollar is at its lowest level in decades, and the dollar is now assessed to be broadly in line with medium-term fundamentals" (International Monetary Fund, 2008).

- The chairman of Congoleum Corporation recently stated, "I reported last quarter that business conditions were the worst I'd ever seen, unfortunately they've gotten worse since…" (Marcus, 2008).
- "GM Stock at 1946 Level as Dire News Grows" … "the auto maker could run out of cash and be forced to file for bankruptcy protection" (Stoll & Terlep, 2008).
- As seen in the graph below, the United State's GDP contribution is well below that of other advanced economies.

Figure 3. (International Monetary Fund, 2008)

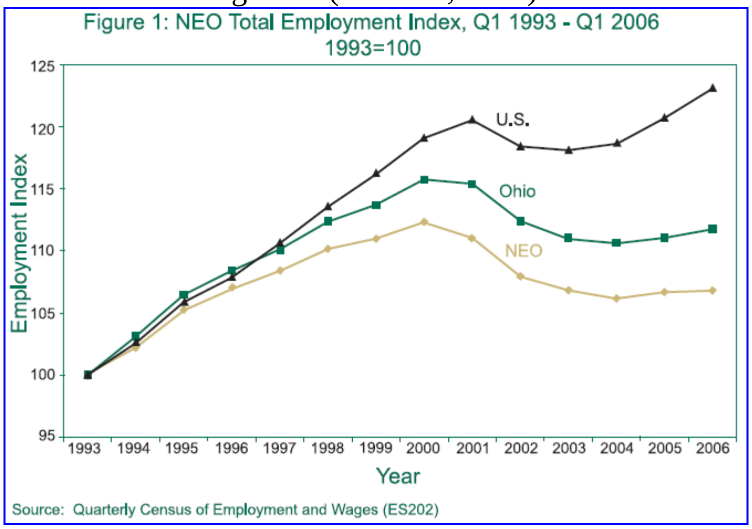


3. **The United States' poor economy has translated into major job losses.**
   - "The nation's unemployment rate last month jumped to the highest level in 14 years…a fresh 240,000 American jobs disappeared in October, the 10th consecutive month of retrenchment. It brought the toll of lost jobs to 1.2 million for the year…while the unemployment rate climbed to 6.5 percent" (Goodman, 2008).
   - "The jobless rate soared to 5.5 per cent from 5 per cent in April. It's the biggest one-month leap since February, 1986, leaving the unemployment rate at its highest point in 3½ years" (Scoffield, 2008).
   - "Circuit City Stores Inc.'s bankruptcy filing Monday underscores how this economic down-turn may differ from others in recent memory: The U.S. retail sector is losing its place as the employer of last resort for the newly unemployed….the country's second-largest electronics chain, had already announced it would cut 6,800 people as it conducts going out-of-business sales…losses were likely to rise to 8,000" (McCracken, O'Connell, & Smith, 2008).

4. **Ohio's economy lags behind the rest of the nation.**
   - "Personal income growth for Ohio over the last several years has trended about 1% to 1.5% below the national rate of 5%" (Kleinhenz, 2007).

- "Economic anxieties dominate in Ohio, where the unemployment rate hit 6% in December and mortgage default rate was 1.44% of loans, compared with 0.87% nationally" (Meckler, 2008).
- As seen in Figure 4, since 1997 Ohio's employment index has not been keeping pace with the rest of the U.S.

Figure 4. (Yamoah, 2007)



5. **On issues relating to the economy, voters produced landslide and historic results in the recent election.**
   - "Election drew highest turnout in 40 years… An increase in turnout this year seemed likely as the 2008 presidential campaign wore on. Pollsters found voter enthusiasm and attention levels were very high, at least in part because of economic concerns…" (*The New York Times, 2008).*
   - "Ohioans voted in favor of amending the Payday Lending Issue Five 63% to 37% (*The New York Times*, 2008).
   - Ohioans voted against Clinton Casino Issue Six 63% to 37% (*The New York Times*, 2008).

6. **Northeast Ohio's employment rate lags behind State and U.S. averages.**
   - "Between 1996 and 2006, employment in Northeast Ohio grew very slightly (0.4%) compared to growth rates of 14.3 percent for the sample average and 12.9 percent for the United States" (Austrian, Yamoah, & Lendel, 2008).
   - "Northeast Ohio (jobs) grew at a comparatively slower rate in the late 1990s and then experienced steeper declines during the recession of the early 2000s" (Austrian, Yamoah, & Lendel, 2008).
   - "Total employment in the region remained almost stagnant between the first quarter of 2004 and the first quarter of 2006, NEO's employment grew at 0.6 percent (11,150 jobs) compared to growth rates of one percent (53,450 jobs) in Ohio and nearly four percent (4,777,150 jobs) in the U.S. From 2005 to 2006, NEO continued with a weaker overall performance compared to the previous year" (Yamoah, 2007).
   - As seen in the Figure 5., in most major economic sectors, Northeast Ohio performed worse than Ohio and U.S. rates.

Figure 5. (Yamoah, 2007)

Table 1: NEO Employment Growth/Decline Rates Compared to Ohio and the U.S., Q1 2004 - Q1 2006

Major Economic Sector (NAICS)	NEO		Ohio	U.S.
	# of Employees, 2006	Percent Change, 2004-2006		
Manufacturing	285,793	-1.3	-2.0	-0.5
Health Care and Social Assistance	271,577	3.5	4.3	4.5
Retail Trade	206,110	-1.6	-1.3	2.5
Educational Services	156,090	-1.2	0.0	2.7
Accommodation and Food Services	140,826	1.7	2.3	5.2
Administrative and Support Services	102,472	9.2	4.8	7.4
Wholesale Trade	85,721	1.9	2.4	4.3
Finance and Insurance	83,260	-2.1	0.0	3.4
Professional, Scientific, and Technical Services	81,769	6.5	5.2	8.7
Construction	70,454	-1.7	0.3	11.9
Public Administration	69,435	1.8	0.5	1.3
Transportation and Warehousing	65,396	-0.7	5.3	3.5
Other Services (except Public Administration)	58,177	-1.8	-0.5	1.5
Management of Companies and Enterprises	36,830	-1.4	-0.1	5.1
Information	34,952	-4.4	-3.6	-2.4
Real Estate and Rental and Leasing	24,222	1.8	0.5	4.0
Arts, Entertainment, and Recreation	22,450	-6.6	-4.2	3.0
Utilities	10,293	-4.0	-1.8	-2.4
Agriculture, Forestry, Fishing, and Hunting	3,418	1.9	-0.5	1.1
Mining	2,389	-2.5	-2.2	17.0
TOTAL	1,812,432	0.6	1.0	3.8

The total number of employees is greater than the summation of the categories above due to some unclassified employees. Source: Quarterly Census of Employment and Wages (ES202)

7. **After a period of decreased utilization, public assistance appears to be on the rise again in Cuyahoga County.**
   - As seen in Figures 6 and 7, Cuyahoga County residents are increasingly using food stamps.

Figure 6. (NEO CANDO System, 2008)

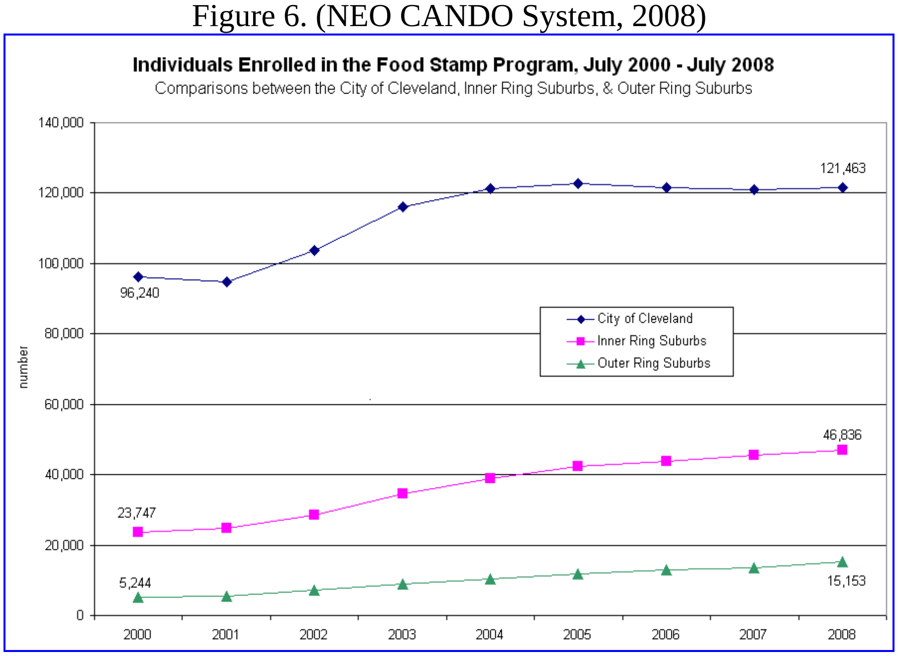
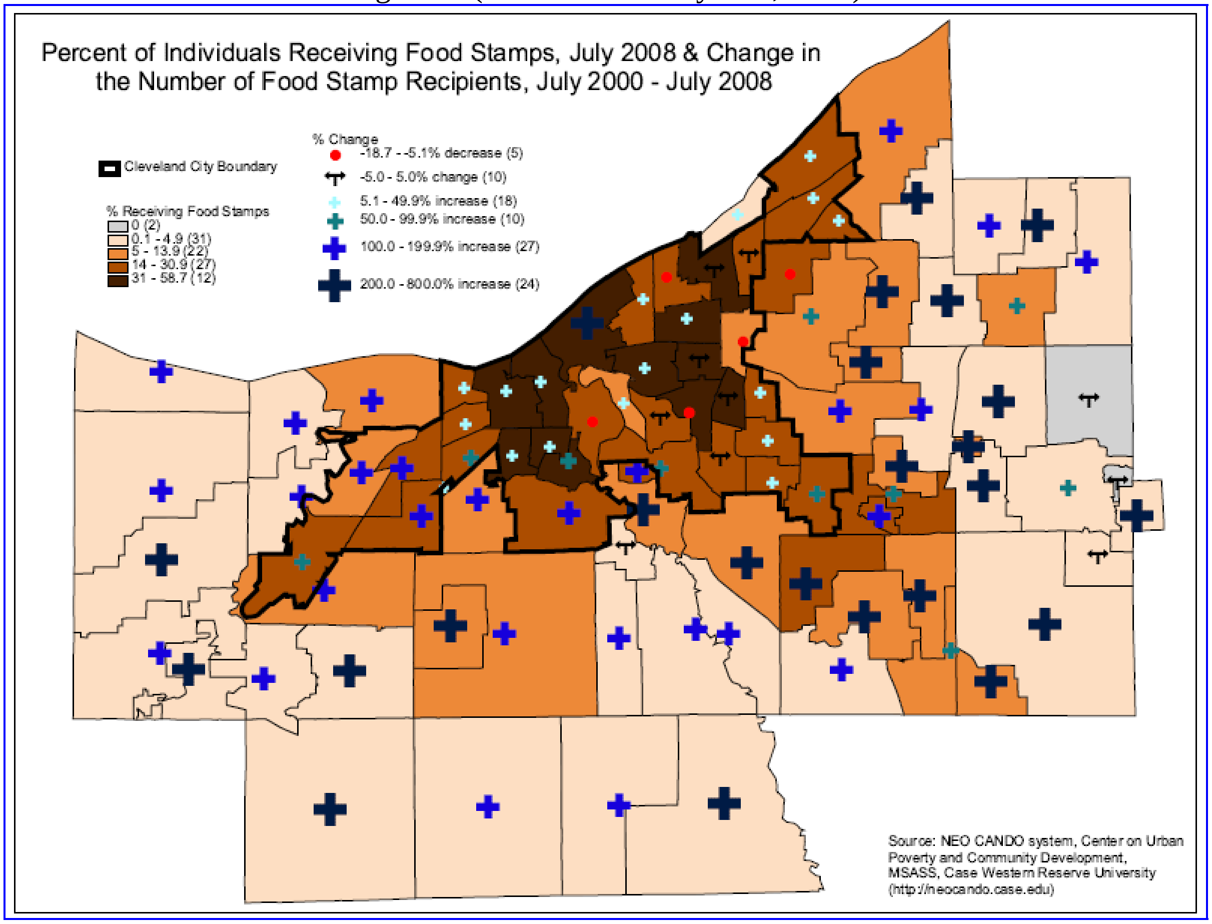


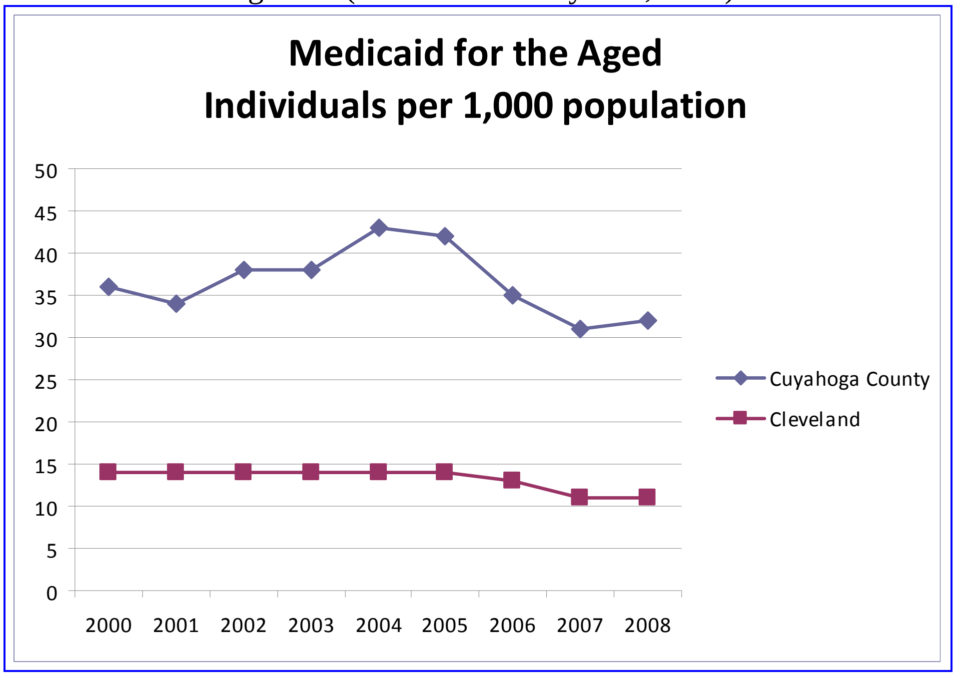
Figure 7. (NEO CANDO System, 2008)



- According to *The Plain Dealer* article, "If you want to find the people behind the country's big jump in food stamps, you have to go to work. That's where they are. The number of American households bringing in a paycheck and collecting food from the U.S. Department of Agriculture. The same is true in Ohio and Cuyahoga County. Working families collecting food stamps more than doubled in the state between 2000 and 2006. 'It's the restructuring of our economy,' says Joseph Gauntner, director of Cuyahoga County's Employment & Family Services, 'the proverbial steelworker who now cleans offices and works at McDonald's'" (Suchetka, 2007).
- More recently, *The Plain Dealer* reported, "The number of people using food stamps rose sharply in Cuyahoga County in recent years, especially in the suburbs, which experts see as evidence of more hunger and weaker jobs. The number of county residents in the federal food stamp program surged 40 percent between 2002 and 2007, according to a study by the Center for Community Solutions, released Thursday. The study found that about 14% of Cuyahoga County's 1.4 million people received federal food stamps last year, probably an historic high. 'That's very likely the highest percentage ever enrolled in the program,' said Joseph Gauntner, the county director of Employment and Family Services" (Smith, 2008).

8. **After a period of decreased utilization, Cuyahoga County residents 65+ are increasingly turning to public assistance.**
   - As seen in Figure 8, total Medicaid for the aged appears to be on the rise again.

Figure 8. (NEO CANDO System, 2008)



- As seen in the table below, the number of individuals 65+ receiving Home and Community Based Services Medicaid in Cuyahoga County consistently increased from 2000 to 2007 (NEO CANDO System, 2008).

Figure 9. (NEO CANDO System, 2008)

Home and Community Based Services Medicaid Individuals 65+								
Tract	**October, 2000**	**October, 2001**	**October, 2002**	**October, 2003**	**October, 2004**	**October, 2005**	**October, 2006**	**October, 2007**
CLEVELAND CITY	1,527	1,617	1,679	1,766	1,903	2,002	2,032	2,050
CUYAHOGA COUNTY	3,063	3,343	3,427	3,605	3,904	4,098	4,276	4,414

- As seen in the table below, the number of individuals 65+ receiving Specified Low Income Medicare assistance in Cuyahoga County increased from 2000 to 2007 (NEO CANDO System, 2008).

Figure 10. (NEO CANDO System, 2008)

Specified low income Medicare Beneficiary Individuals Aged 65+								
Tract	**October, 2000**	**October, 2001**	**October, 2002**	**October, 2003**	**October, 2004**	**October, 2005**	**October, 2006**	**October, 2007**
CLEVELAND CITY	1,352	1,550	1,846	1,549	1,735	1,766	1,886	1,856
CUYAHOGA COUNTY	2,844	3,193	3,701	3,136	3,523	3,679	3,927	3,964

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FUNDING AND FUNDRAISING

1. **More nonprofits are turning to earned income strategies as revenue sources.**
   - According to an article from *The Chronicle of Philanthropy* entitled "Giving's Tough Economic Climate", "Many charities are starting businesses so they don't have to rely entirely on money from private donors" (Hall, 2008).
   - "The idea that you can get all of your income from private donations or even foundations" is no longer true, said Richard Clark, president of 501 Inc!, a Cleveland professional services firm for nonprofit organizations" (Mortland, 2007).
   - According to Kelly Dylag, president of the social services nonprofit Far West Center in Westlake, Ohio, "Government subsidies for social services are flat or declining and, therefore, they are not a viable long-term money source. Therefore, nonprofits should be looking for ways to make their own money" (Mortland, 2007).
   - Speaking to earned income strategies provided by a private company, Sally Morgan Smith, Director of Autism Asperger Syndrome Resource Center said, "My agency is way ahead of the time line that our business plan established for becoming self-supporting. The revenues from fees for services are now more than covering our operations and are currently allowing us to underwrite our free community services" (Nonprofit Business Solutions, 2007).

2. **Increasingly, donors and the government desire greater accountability from nonprofit organizations.**
   - Senator Charles Grassley comments on the revised 990 proposal, saying, "This means more consistent transparency from tax-exempt groups. Under the current set-up, some groups are very transparent and others are secretive or lackadaisical about what they file. For the most part, this form is the only document tax-exempt groups have to file with the IRS in exchange for their billions of dollars in tax breaks. That form should be useful. Donors and taxpayers need reliable information to gauge how well these groups serve their charitable purpose. More transparency and accountability will help keep the charitable sector going strong. The IRS has done a good job of bringing about more reporting across the board and recognizing that the tax-exempt sector is a growing part of the economy…The IRS easily could have done more to help donors readily understand where their money goes. I plan to revisit that issue" (States News Service, 2007).
   - "An October 2007 Contribute Magazine/Harris Interactive survey of 3,040 adults showed a disturbing 59 percent more concerned today than they were a decade ago that their charitable donations are not being used effectively. A nearly equal number of respondents - 56 percent - expressed growing concern about the "misuse of funds." Nearly half of the respondents (49 percent) were worried about "unnecessary administrative overhead." And 46 percent said they are increasingly concerned about "fraud or theft of funds…the courts need to send a strong signal to nonprofit officials that they can be challenged and held accountable when they misuse restricted gifts" (Robertson, 2008).
   - In an article taken from *The Nonprofit Quarterly* entitled "Evaluation for the Way We Work," author Michael Quinn Patton discusses the essentiality of proper program evaluation to donor satisfaction. "This distinction is especially important at a time when funders are demanding accountability and shouting the virtues of "evidence-based" or "science-based" practice" (Patton, 2006).

3. **Foundation giving is on the rise.**
   - "The country's more than 72,000 grantmaking foundations increased their giving to $42.9 billion in 2007, an estimated 10 percent gain over 2006, according to *Foundation Growth and Giving Estimates: Current Outlook"* (Foundation Center, 2008).
   - "Independent and family foundations — which represent almost nine out of 10 foundations — raised their giving by 12.7 percent in 2007, up from an increase of 9 percent in 2006" (Foundation Center, 2008).
   - "Corporate foundation giving rose 6.6 percent in 2007, following a modest 2.6 percent increase in 2006" (Foundation Center, 2008).
   - "Community foundations raised their giving by 13.9 percent in 2007, up from 11.8 percent growth in 2006-the fourth consecutive year of double-digit increases" (Foundation Center, 2008).
   - The graphs below illustrate these increases.

Figure 1. (Foundation Center, 2008)

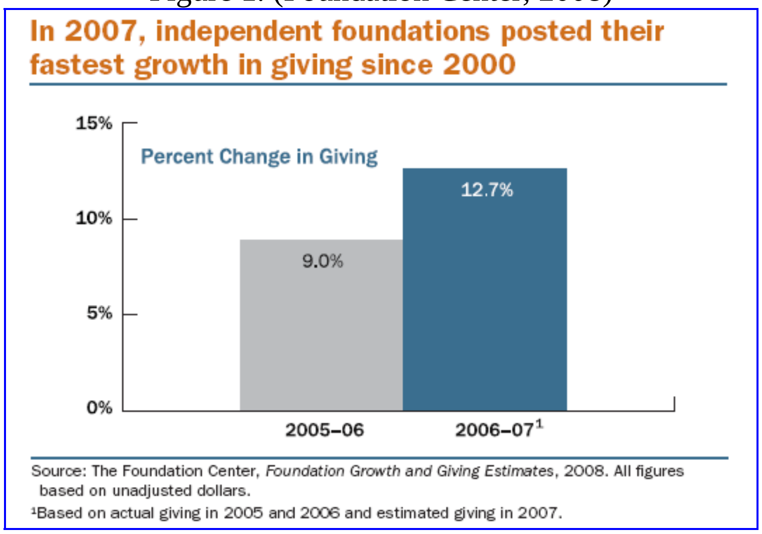


Figure 2. (Foundation Center, 2008)

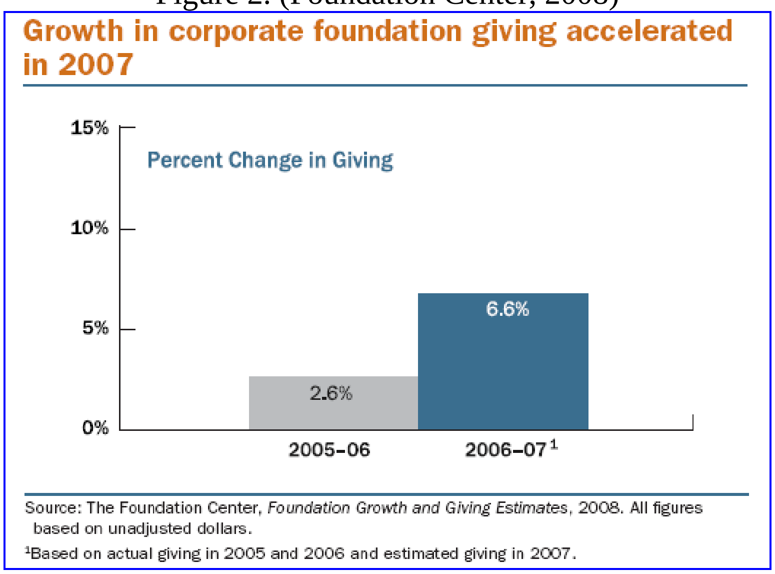
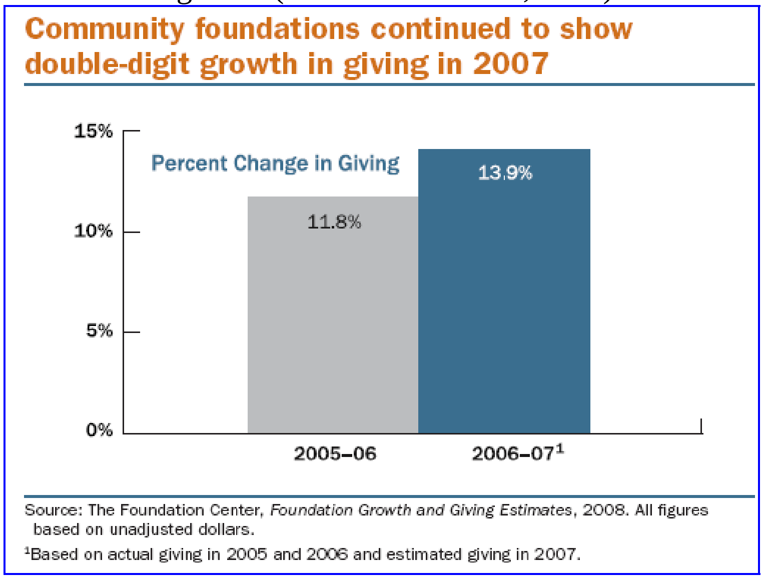


Figure 3. (Foundation Center, 2008)



4. **Individual giving is heavily relied upon by nonprofit organizations as a major revenue source.**
   - According to Clay Brewer, interim CEO of Big Brothers Big Sisters of Greater Cleveland, "Individual contributions turn out to be by far the most helpful and lasting than any of the other kinds of funding" (Mortland, 2007).
   - According to an article from *The Chronicle of Philanthropy* entitled "A Charitable Divide," "At the UJA-Federation of New York, which raised $151-million in its 2007 annual fund-raising campaign — $7-million more than the year before — wealthy investors donated $21.6-million in a single evening last month at the charity's Wall Street Dinner, and gifts are still rolling in" (Hall, 2008).
   - According to the tables below, which are taken from an article in *The Chronicle of Philanthropy* entitled "Giving's Tough Climate" individual giving accounts for the overwhelming majority of charitable giving:

Figure 4. Giving to Charities by Source of Donations (Hall, 2008)

Corporations	5.1%
Bequests	7.6%
Foundations	12.6%
Individuals	74.8%

Source	Total Donations	Percentage change from 2005 to 2006*	Percentage change from 2006 to 2007*
Individuals	$229.03-billion	-2.4%	-0.1%
Bequests	$23.15-billion	-10.6%	+4.0%
Foundations	$38.52-billion	+4.3%	+7.3%
Corporations	$15.69-billion	-10.1%	-0.9%
SOURCE: Giving USA Foundation			*Adjusted for inflation

5. **Governmental funding of nonprofit organizations is decreasing.**
   - According to an article entitled "A Charitable Divide" from *The Chronicle of Philanthropy*, "While social-service groups are suffering nationwide, it is in states with troubled economies where the problem is most severe. Declining tax revenue in Arizona, Michigan, Minnesota, and other states have prompted government officials to cut grants that many social-service groups have relied on to provide services such as reduced-cost child care to working parents at or near the poverty line" (Hall, 2008).
   - "With the economic downturn and the housing slowdown eating into tax revenue, many states are struggling to balance their budgets – which would mean new cuts in spending that could affect nonprofit groups…" (Jensen & Perry, 2008).
   - "To aggravate matters, President Bush has proposed slashing several key types of federal grants to states and cities. The president has proposed reducing Community Development Block Grants, Child Care Development Block Grants, Social Services Block Grants, home-energy assistance, and other programs. The Center on Budget and Policy Priorities, a think tank in Washington, calculated that grants to state and local governments for all programs other than Medicaid would decline by an inflation-adjusted $18.9-billion, or 7.4 percent, in 2009" (Jensen & Perry, 2008).

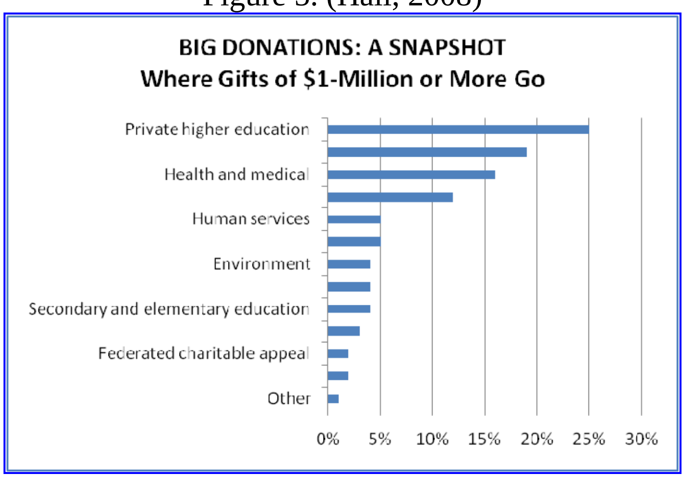
6. **The federal government is putting policies in place to make charitable giving attractive.**
   - A November 29, 2007 article states, "When the House of Representatives passed its controversial Responsible Tax Relief Bill this month, it also voted to extend a tax incentive that allows older donors to deduct money contributed to charities through their individual retirement accounts. The incentive, which allows taxpayers age 70 1/2 to make tax-free charitable contributions from their IRA accounts, is scheduled to expire on December 31. The House bill would extend the provision for another year" (Panepento, 2007).
   - "In the budget plan for 2009 that President Bush submitted to Congress, he proposed making permanent several temporary incentives for charitable giving... People who are 70 or older would be able to give up to $100,000 to charity from their individual retirement accounts tax-free. Grocery stores, restaurants, farmers, and other small businesses would be able to claim an "enhanced tax deduction" for donating excess food to charity. Usually, groups can deduct only the production costs of goods, but the enhancement allows them to deduct production costs plus some of the difference between production costs and fair market value" (Kean, 2008).
   - "The administration proposed a flat tax of 1 percent on all private foundations' net investment income. Currently, private foundations pay 2 percent on such income unless their charitable giving for the year exceeds their average giving for the past five years. When foundations give away such a high amount, they pay only 1 percent tax on their investment earnings" (Kean, 2008).

7. **Today's poor economy is negatively affecting charitable giving.**
   - "A new GuideStar survey shows that the proportion of charity representatives reporting decreased contributions nearly doubled between 2007 and 2008, and that almost half of participants from nonprofits that rely on end-of-year gifts expect donations to decline during the last quarter of 2008 compared to the last quarter of 2007" (Guidestar, 2008).

- “The economy's woes are starting to make it tougher on organizations running ambitious capital drives. Fund raisers across the country say that individuals, corporations, and foundations they expected to make big gifts to capital campaigns this year have refused to do so, while others say that donors are making smaller-than-expected contributions” (Hall, 2008).
- “Even institutions with flourishing campaigns are bracing for what could be a bumpier ride at the end of this year. Despite raising a record $14-million at a dinner event last month, much of it from hedge-fund and other Wall Street executives, officials at Harlem Children's Zone say that contributions to its $100-million endowment campaign are likely to slow, particularly in the final quarter of the year” (Hall, 2008).

8. **Social service organizations are having more difficulty raising funds than organizations in other sub-sectors.**
    - An article in *The Chronicle of Philanthropy* entitled “A Charitable Divide” says, “Charities that provide social services have traditionally lagged behind the fund-raising achievements of institutions like colleges, hospitals, arts organizations, and community foundations. What is different now is that so many of those organizations have obtained record increases in contributions at the same time that growing numbers of social-service organizations are facing flat or declining donations and unprecedented demands” (Hall, 2008).
    - In that same article it was said, “Colleges, hospitals, arts organizations, community foundations, and other wealthy institutions have in the past decade built their endowments and reserves to insulate themselves from economic fluctuations…affluent donors overwhelmingly prefer such institutions, according to a study released last month by the Institute for Jewish & Community Research, a San Francisco think tank that examined more than 8,000 gifts of $1-million or more to 4,000 nonprofit organizations. The study found that the largest share of those dollars, 44 percent, went to colleges and universities, followed by hospitals and other medical institutions (16 percent), and arts and cultural organizations (12 percent). Social-service groups received just 5 percent of the dollars” (Hall, 2008).
    - Figure 5 illustrates the small portion of major gifts that human/social service agencies receive.

Figure 5. (Hall, 2008)



Source: The Institute for Jewish & Community Research

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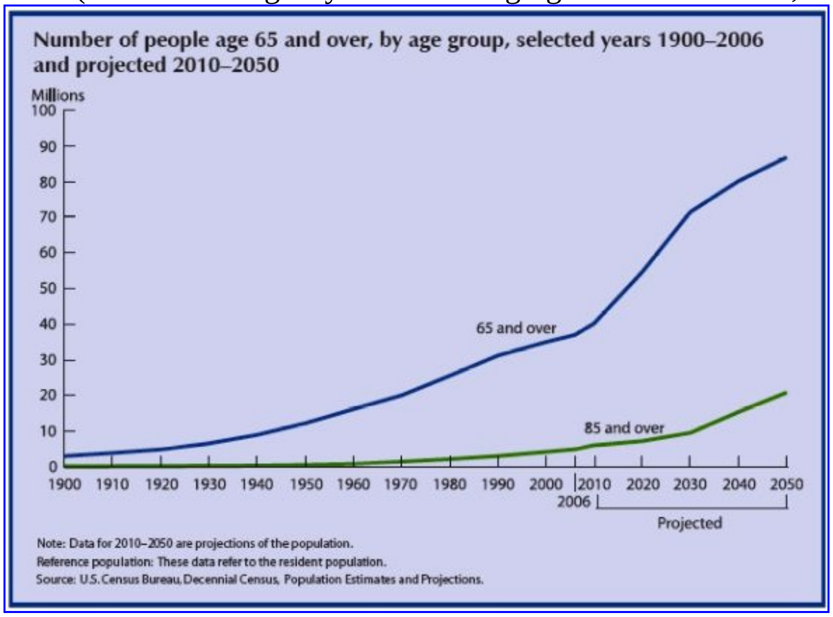
SOCIAL/DEMOGRAPHIC: SENIORS

1. **Across the nation, aging is taking on new definitions.**
   - Life expectancy rates across the nation are increasing. Children born in the United States in 2006 are expected to live to be 78.1 years old on average. This is the first time life expectancy has surpassed 78 years in the United States. The boost is in large part due to great improvements in healthcare, education, and nutrition (Paddock, 2008).
   - The term "active senior" has crept into the American vocabulary. Older adults are staying more active longer than ever before, even using spare time for volunteering. "As Baby Boomers continue to remain active long after the previous generations, volunteer roles may have to be reevaluated. The population is aging. But don't expect baby boomers to retire in the traditional sense--or certainly not at age 65. Barring illness, someone aged 60 today does not think of himself or herself as old, nor does anyone else" (Ellis, 2005).
   - The National Census Bureau has been tracking the number of older adults (65 and older) since 1900 and have projected, given the current life expectancy and the number and range of American "Baby Boomers," that the number of seniors will begin to grow much more rapidly starting just before 2010 and will not start to plateau until 2030 (Federal Interagency Forum on Aging Related Statistics, 2008).

Figure 1. (Federal Interagency Forum on Aging Related Statistics, 2008)



2. **The Baby Boomer generation, the next generation joining the ranks of older adults, is not like any previous generation of seniors.**
   - "Although age may alter some of the physical activities that boomers enjoy, it will not hinder their desire to be active, independent and always looking for something new and interesting" (Ohio Department of Aging, 2007).
   - "Boomers prize holding on to their youth. They see age as a state of mind and agelessness as a way of life. *Forever Young* is their creed. They will reject every effort to push them into the 'old age' category. Some boomers do recognize that they are older, but pride themselves on being more youthful than their parents were at the same age.

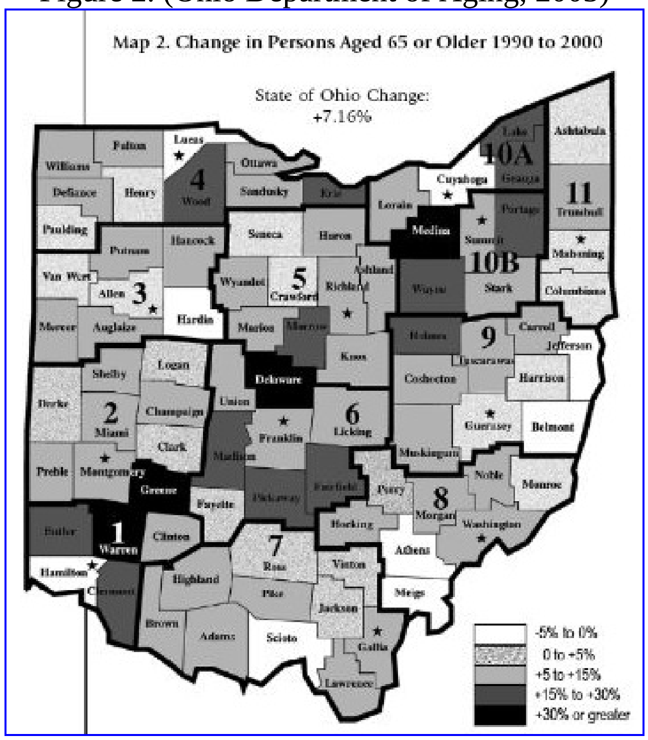
They are, and plan to remain, more active than their parents, whether they 'officially retire' or not" (Ohio Department of Aging, 2007).

- "Boomers want lifestyles at least as good as they experienced as children in the 1950s" (Ohio Department of Aging, 2007).
- "On average, boomers have higher incomes and have accumulated more wealth than their parents' generation. Half of boomer households are on track to maintain the same standard of living upon their planned retirements. About a quarter of boomer households - mainly those with low incomes - have saved very little and will most likely see their standard of living decline significantly on retirement. The remaining quarter has an uncertain future - one that could tip either way in the face of a slight change in circumstances" (Ohio Department of Aging, 2007).
- "With the Jack Kerouac generation already well on the road toward retirement, demographers and experts on aging are urging policymakers to invest in new public transportation options. The shortage of suitable transportation for older residents will become especially acute in the suburbs, not only because transportation there revolves around the automobile, but also because boomers who grew up in the suburbs appear to be staying there" (Kunkle, 2007).

3. **The Baby Boomers are already beginning to change and shift the entire older adult demographic.**
    - "In 2006, the first of the baby boomer generation, born 1946 to 1964, began turning age 60 at a rate of more than 12,000 per month in Ohio. Boomers will shape what aging and retirement will look like for the next 20 to 30 years, first as caregivers and then as consumers" (Ohio Department of Aging, 2007).
    - "The number of senior citizens is expected to double by 2030. As that population swells, experts said, so will the need for new ways to get around as more people live well beyond the age when they quit driving. A 2002 study by the National Institute on Aging found that about 600,000 people who are 70 or older stop driving every year and become dependent on other forms of transportation. The study found that men who stopped driving would rely on public or other means of transportation for an average of seven years. Women would need public transportation for 10 years" (Kunkle, Drive to Keep Going; On Any Given Day, Millions of U.S. Residents Over 65 Stay Home Because They Don't Have Transportation. The Race Is on to Change That., 2007).
    - "By 2012, approximately 10,000 Americans will turn 65 every day and by 2030 our overall senior population will reach nearly 71 million (Centers for Disease Control and Prevention and The Merck Company Foundation). As America ages, seniors and their families are identifying transportation and driving safety as among their top growing concerns. Indeed, the more than 30 million senior drivers aged 65 or older on the road today (National Highway Traffic Safety Administration) must now or will soon need to acknowledge physical limitations that will cause them to reduce their driving or seek alternative transportation altogether" (Biotech Business Week Staff Writer, 2008).
    - "As baby boomers age, current traditional women's roles and responsibilities will be challenged and replaced" (Ohio Department of Aging, 2007).
4. **Older adult demographics across the state of Ohio show that Ohioans are aging possibly more slowly but no less dramatically than thought, while the rest of Ohio's population may not be keeping pace.**

- In 2005, Ohio’s total elder population (ages 60 and above) equaled 1,840,552. In the same year, Ohio’s total Baby Boomer (ages 45-59) equaled 2,128,605. The number of older adults will increase in the years to come (Ohio Department of Aging, 2007).
- Between the 1990 and 2000 censuses, the number of total Ohioans aged 65 and above increased by 7.16%; however, the number of Cuyahoga residents aged 65 and above decreased. Meanwhile, the number of Medina County residents aged 65 and above increased by at least 30% (Ohio Department of Aging, 2003).

Figure 2. (Ohio Department of Aging, 2003)



- “While the trend suggests that the elderly population is declining in Cuyahoga County, seemingly lessening elderly demand for transit services, closer examination of the data reveals another conclusion. The growth in the population in the 75 years or older cohort, combined with the fact that residency in nursing homes is declining among this group, suggests that an increasing number of highly transit dependent persons, who reside independently in their own homes, is an issue for transit planners” (RLS and Associates, Inc., 2004).
- In the past 15 years, older adult Ohioans were more likely to be found in metropolitan or urban areas. According to the 1990 census, 67% of Ohioans aged 65 or older lived in urban areas. In 2000, that number grew to 80% (Ohio Department of Aging, 2003).
- “Nearly 25% of the older adult population is classified as rural. Rural elders make up almost 18% of the total Ohio rural population. As older adults age, the number of rural elders decreases rapidly since the population shifts to more urban areas” (Ohio Department of Aging, 2007).
- All Ohio counties saw an increase in the number of older adults 85 and older between the 1990 and 2000 censuses (Ohio Department of Aging, 2003).
- “The number of baby boomers turning age 60 in Ohio each year increased significantly

from 2006 to 2007. The total number of individuals turning age 60 rose from 110,000 to 140,000 per year, an increase of 27%. The total number of persons turning age 60 during a year is projected to peak at 158,000 in 2018" (Ohio Department of Aging, 2007).

- Not only is the number of older adult Ohioans increasing, the range and diversity of the aging Ohio population is expanding. In Ohio, "the age 60 and older population will grow from 18% of the total state population to nearly 26% by 2030. The number of Ohioans age 60 and older will grow 52% by 2030. The age 60 – 75 segment will continue to represent about two thirds of the total older adult population, while the age 85 and older cohort will grow by 82% as elders live longer and the first baby boomers reach that age" (Ohio Department of Aging, 2007).
- "Ohio currently ranks sixth among states for age 65 and older population. By 2010, Ohio will drop to and remain in seventh place" (Ohio Department of Aging, 2007).

5. **Current demographics and concerns of older adults in Cuyahoga County are generally reflective of the state statistics.**
   - According to the most recently released statistics from the National Census Bureau, Cuyahoga County residents age 55 to 59 compose 6.5% of the county's total population. Residents between the ages of 60 and 64 make up 4.7% of the county's population. Seven percent of Cuyahoga County residents are between the ages of 65 and 74. County residents between the ages of 75 and 84 make up 5.9% of the county's population. Finally, 2.1% of the county's population is currently 85 or older. All in all, 17.9% of county residents are 62 or older, and 15.1% of county residents are 65 or older (Exner, 2008)
   - The level of older adults (65 and over) is currently stable in Cuyahoga County but is expected to grow rapidly starting in 2010 as baby boomers reach retirement and senior status (Department of Senior and Adult Services, 2008).
   - According to a recent survey conducted by Cleveland State University of 1,500 Cuyahoga County seniors, 248 service providers, and 7 agencies in the aging network, the three greatest concerns seniors from all sections of the county listed were home maintenance, transportation, and assistance with housekeeping (Department of Senior and Adult Services, 2008).

6. **Marital status and living arrangements are key indicators in how older American adults arrange their general care.**
   - Marital status is a key determinant on the living and caregiver arrangements of older adults. In 2007, American men were far more likely than women to be married in the age range of 65 and over. Even among the oldest age group (85 and over), men are more likely to be married than anything else. Furthermore, women are far more likely to be widowed than men. In fact, women are three times more likely to be widowed than men of the same age, meaning women are far more likely to live alone, maintaining independence. See Figure 3 (Federal Interagency Forum on Aging Related Statistics, 2008).
   - Living arrangements among older adults are key in determining needs and availability of caregivers for those with limited abilities. Fewer than a fifth of all American men 65 and older live entirely on their own. The ratio of American women to men aged 65 and older

living alone in 2007 was 2 to 1. See Figure 4 (Federal Interagency Forum on Aging Related Statistics, 2008).

- According to the same study, Black men and women are the most likely groups to live alone in 2007. Black women were the only group in 2007 to have a greater likelihood of living with relatives than with living with a spouse (Federal Interagency Forum on Aging Related Statistics, 2008).

Figure 3 (Federal Interagency Forum on Aging Related Statistics, 2008)

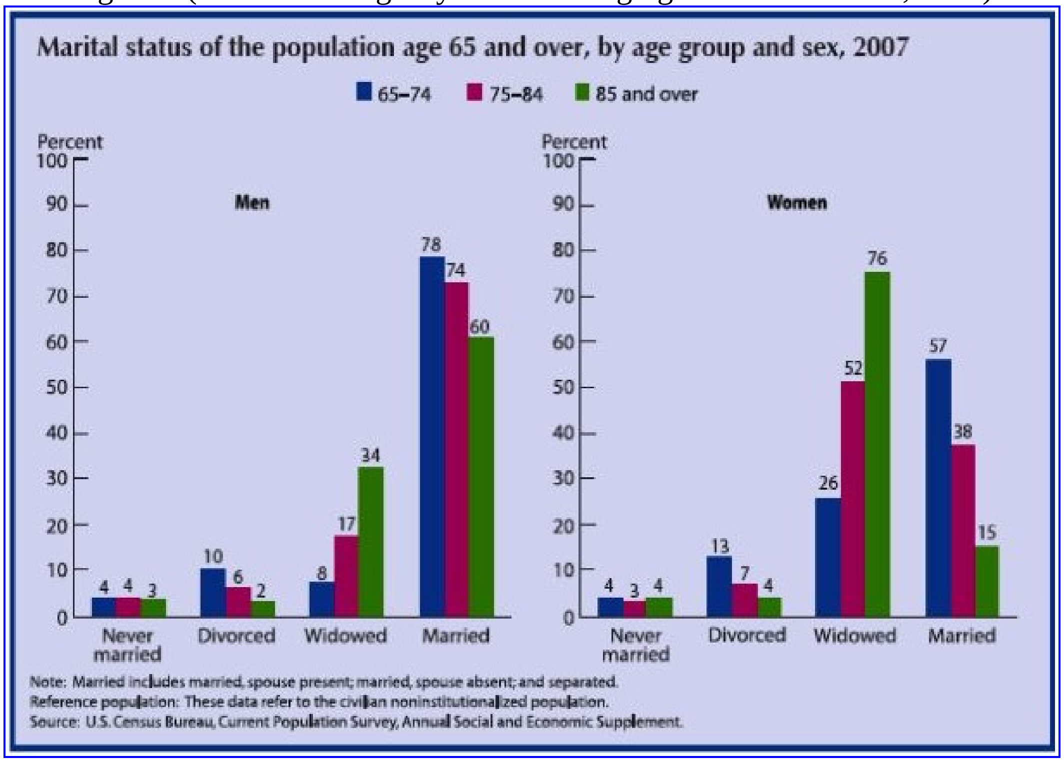
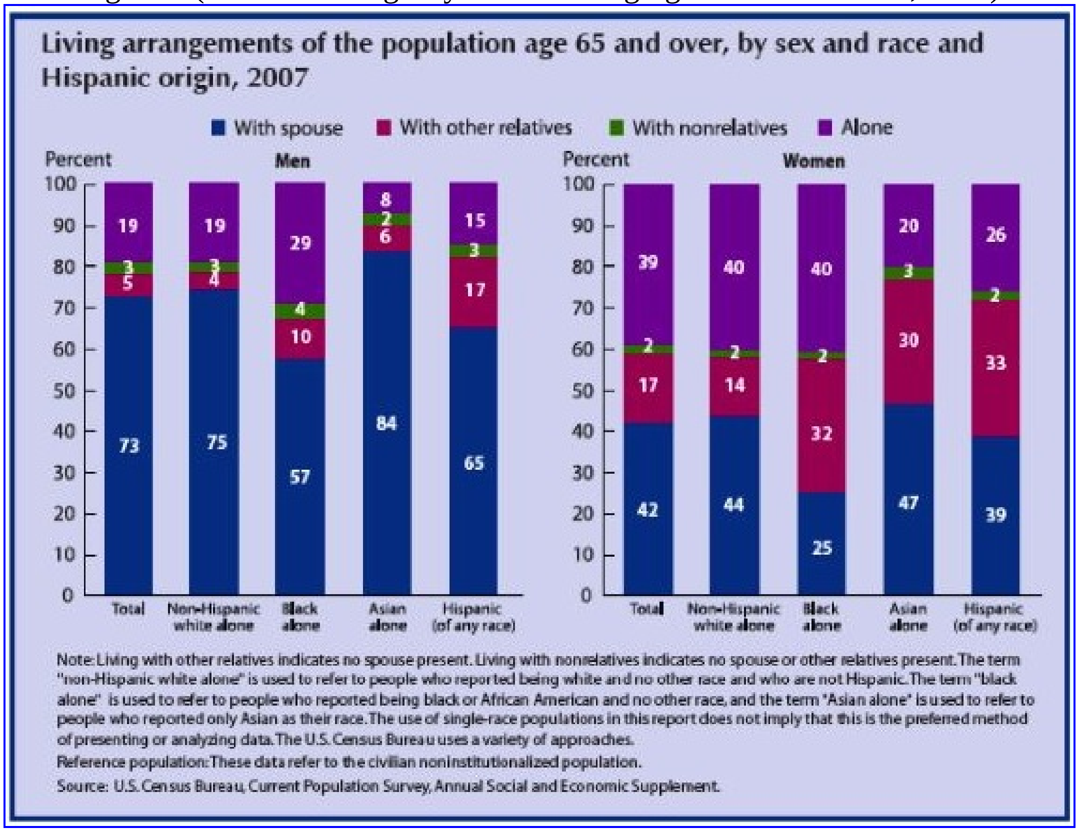
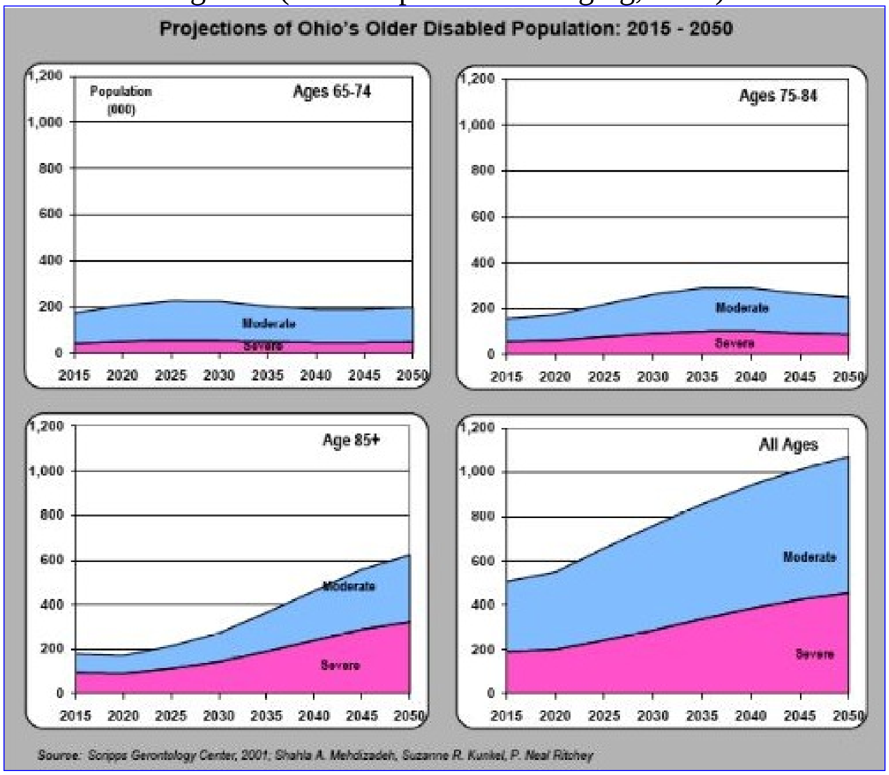


Figure 4 (Federal Interagency Forum on Aging Related Statistics, 2008)



7. **As populations age, the number of people with limited physical and mental abilities and fiscal means will increase.**
   - "Forty percent of older adults age 65 and older report having some form of disability. More than half of these individuals report having two or more disabilities. The most common disability is a physical disability, reported by more than 30% of individuals. Women are more likely than men to have a disability. More than 60% of those age 85 and older report having moderate or severe disabilities. Projections show that there will be more than twice the number of older adults with disabilities by 2050. Much of the increase will be in the age 85 and older segment" (Ohio Department of Aging, 2007).
   - Please see the graphs in Figure 5 for projected disabled population 2015 - 2050 below. Note that moderate disability is defined as experiencing limitations in at least one of these activities of daily living: walking, shopping, meal preparation, housekeeping or using transportation. Severe disability is defined as experiencing limitations in at least two of these activities of daily living: eating, transferring in and out of bed or chair, getting to the toilet, dressing, remaining continent or cognitive functioning (Ohio Department of Aging, 2007).

Figure 5 (Ohio Department of Aging, 2007)



- "As age increases, total annual household income decreases. This can be expected in the earlier years as people retire and have less household income from wages. The current older population also will have received less Social Security benefits when they retire. After adjusting for cost-of-living increases over the years, they have not maintained the dollar value of their original benefit. Beginning in the age 70 - 74 group, more than 50% of Ohio older adults are classified by the U.S. Department of Housing and Urban Development (HUD) as low-income households, with less than 50% of median income" (Ohio Department of Aging, 2007).
- "In 2007, the federal poverty level is $10,210 for a one-person household and $13,690 for a two-person household. The overall poverty rate for Ohio elders age 65 and older is 8.4%" (Ohio Department of Aging, 2007).
- "Older adults age 60 and older in Ohio households use 20% of food stamps" (Ohio Department of Aging, 2007).
- "More than 186,000 older Ohioans are raising their own grandchildren" which even further limits the amount of limited financial resources available to older adults (Ohio Department of Aging, 2007).

8. The gender gap among older adults persists regardless of advancements in healthcare practices and technologies.

- "Women continue to out number and out live men, nationally and locally. In Ohio, the gender ratio drops from 92 men per 100 women at age 60 to 44 per 100 for ages 85 and older. Since many aging services are primarily provided to the age 75 and older population, care must be used to address the delivery of those services primarily to female consumers" (Ohio Department of Aging, 2007).

- Because women are more likely to be widowed than men, women are more likely to live alone and in need of assistance for people 65 years old or older. See Figures 3 & 4 (Federal Interagency Forum on Aging Related Statistics, 2008).
- In 2007, *The New York Times* reported that for the first time in American history, women over the age of 18 are more likely to live without a husband than with one. Rising divorce rates and increasing unmarried cohabitation statistics coupled with a large and growing number of American widows account for the fact that 51% of women live without a husband (Roberts, 2007).

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POLITICAL/LEGAL

1. **The federal government has shown greater concern over nonprofit fiscal accountability and organizational governance in the past few years.**
   - "According to the American Association of Fundraising Counsel (AAFC), contributions to U.S. nonprofit organizations in 2003 totaled more than $240.7 billion and are estimated to be 2.2 percent of the gross domestic product (AAFC, 2004). Bradley and colleagues in the May 2003 issue of *Harvard Business Review* argue that there is concern that nonprofit organizations do not use charitable dollars as efficiently as possible to advance their charitable mission (Bradley, Jansen, & Silverman, 2003). This potential lack of efficient flow of funds contributes to the need to examine accountability within nonprofit governance. An examination of nonprofit governance is relevant and timely due to the recent calls by Federal and state regulators to analyze the activities of nonprofit organizations within the United States. The Senate Finance Committee has raised questions concerning improved corporate governance and accountability within the nonprofit sector. According to Senator Chuck Grassley, it is important for charities to 'keep their trust with the American people' (U.S. Senate Committee on Finance, 2004), and many of the problems within nonprofit organizations are based upon poor governance or 'failure to abide to best practices'. Senator Grassley further argues that the Committee must concentrate on 'more general reforms to address recurrent problems in the nonprofit sector' (U.S. Senate Committee on Finance, 2004)" (Smith & Richmond, 2007).
   - In May 2007, Senators Max Baucus (D-MT) and Charles Grassley (R-IA) sent a joint letter to Treasury Secretary Paulson in reference to governmental oversight of nonprofits and the annual Form 990 they file with the IRS. "There is a particular focus of concern on scrutinizing hospitals and universities. 'Large, complex institutions, such as hospitals and universities, require more detailed questions tailored to the specifics of their fields if transparency and openness are to have real value.' The letter from Baucus and Grassley addresses seven areas they feel are of particular importance in regards to the oversight of charities. These include endowments, related organizations, joint ventures, governance, fund raising, hospitals, and executive compensation. This request should be no surprise; given the two Senators past focus on any inappropriate practices of tax-exempt organizations" (Adams, 2007).
   - Sen. Charles Grassley (R-IA), typically known for his extremely close scrutiny of nonprofit hospitals has expanded his financial and governance examinations into other subsectors of the nonprofit sector. "Grassley received complaints from watchdog groups expressing concern that some televangelists were operating for-profit ventures rather than religious ministries. In a letter to David and Joyce Meyer, Grassley points to recent articles and news reports regarding possible misuse of donations to religious organizations as raising concerns for the Senate Finance Committee. In that same letter, Grassley asks the Meyers to send reams of information to the Senate Finance Committee by December 6, 2007. The requested information includes:
     - Audited financial statements for Joyce Meyer Ministries (JMM) and any related tax-exempt entities.
     - The names of integrated auxiliaries.
     - The names and addresses of JMM board and compensation committee members.

- Dates and locations of board meetings, together with costs.
- Detailed explanation of compensation paid to Joyce and David Meyer.
- Detailed explanation of personal use assets of JMM.
- Copies of compensation recommendations received by JMM.
- Detailed accounting of the total monthly expenses to maintain personal residence(s), including any vacation homes.
- Credit card statements.
- A list of all vehicles purchased, leased or maintained by JMM or any other tax-exempt entity for the benefit of Joyce Meyer, David Meyer, and any other related persons.
- A list of all domestic and overseas bank accounts.
- A list of all real property purchased by JMM from the ministry's inception.
- Detailed information of any aircraft owned, used or leased by JMM.
- Employment agreements between JMM and Joyce and David Meyer.

Given this list, Senator Grassley has apparently decided to conduct his own audit of the Meyers" (Siegel, 2007).

- "'Solid boards are the bedrock of high-quality nonprofits', said Kyle Caldwell, president of the Michigan Nonprofit Association. The changing need for more transparency and higher level of due diligence requires that boards be trained at ever-increasing higher levels. 'There is a definite need out there for training, support and recruitment for nonprofit boards, and there always will be because boards turn over,' he said" (Begin, 2007).
- In a press release, Sen. Charles Grassley (R-IA) expressed concern over university presidents' compensations during hard economic times. Once again he called for greater transparency saying, "Maybe the salary increases can be justified, but students, parents, and university boards should have full information so they can decide for themselves. More transparency of expenses through a new Form 990 schedule would at least help keep the public informed" (Gerber, 2008).

2. **The newest revisions to the IRS Form 990 reflect much greater concern over fiscal accountability of nonprofits as well as transparency of many other areas of nonprofit organizations, especially in relation to Board governance.**
   - "In the letter to [Treasury Secretary] Paulson, [Senators] Baucus and Grassley wrote that Internal Revenue Service Form 990, which is used by the not-for-profit sector, 'has not kept up with modern practices in the charitable sector and needs significant updating.' A revision of the form would 'allow the IRS to better identify those entities that warrant additional review or further questions' and would improve transparency, the senators wrote. Grassley in a news release said, 'Fast and loose games in this area (compensation of charity executives) and others undermines the mission of nonprofits and fosters a public cynicism that's very detrimental to all charities as they rely on public support and backing for their nonprofit work.' Baucus in the same release complimented the work of not-for-profit organizations, adding that it is 'important to ensure, however, that these organizations receiving tax-exempt status earn it on a daily basis and keep their activities and policies in line with the special status conferred on them by the tax code'" (The Henry J. Kaiser Family Foundation, 2007).

- As of September 2008, the Internal Revenue Service released a revised and much more comprehensive version of IRS Form 990, the largest reform since the 1970's. "The Form 990 has been redesigned effective for 2008 tax years. The new form consists of an 11-page, 11-part core form that is required to be completed by all organizations that file the Form 990, and Schedules to be completed by those organizations that satisfy the applicable requirements for each Schedule…. Some information previously required of only certain types of organizations now is required of all types of organizations completing the form" (Internal Revenue Service, 2008).
- "Some areas of major changes in reporting requirements include governance and compensation of officers, directors, trustees, key employees, and highest compensated employees. For example, Part VI, *Governance, Management, and Disclosure*, is a new section that asks questions about the organization's governance structure, policies and disclosure practices. Part VII, *Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors*, also contains important changes, including new definitions of officer and key employee applicable to all organizations, and the extension of reporting compensation paid to the top five highest compensated employees from organizations described in section 501(c)(3) or 4947(a)(1), as was previously the case, to all organizations filing the Form 990, such as social welfare organizations, business leagues, trade associations, and social clubs" (Internal Revenue Service, 2008).

3. **Federal legislators and the executive branch recognize that America's population is aging and transportation is an issue facing many Americans; they have, therefore, proposed legislation that will affect both older adults and access to public transportation.**
   - On February 24, 2004, President George W. Bush issued Executive Order: Human Service Transportation Coordination which established the Interagency Transportation Coordinating Council on Access and Mobility in an effort to coordinate efforts among the departments of Transportation, Health and Human Services, Education, Labor, Veterans Affairs, Agriculture, Housing and Urban Development, the Office of the Interior, and the Social Security Agency. The combined efforts of these offices will reduce duplication in services as well as identify gaps in service to better serve the transportation needs of citizens in poverty or of advanced age who have been shown to have limited access to quality transportation. In the Executive Order, The White House acknowledged, "a strong America depends on citizens who are productive and who actively participate in the life of their communities. Transportation plays a critical role in providing access to employment, medical and health care, education, and other community services and amenities …. These transportation resources, however, are often difficult for citizens to understand and access, and are more costly than necessary due to inconsistent and unnecessary Federal and State program rules and restrictions." Furthermore, "federally assisted community transportation services should be seamless, comprehensive, and accessible to those who rely on them for their lives and livelihoods. For persons with mobility limitations related to advanced age, persons with disabilities, and persons struggling for self-sufficiency, transportation within and between our communities should be as available and affordable as possible" (Bush, 2004).

- Rep. Jim Oberstar (D-MN) with two cosponsors introduced H.R. 6052, the Saving Energy Through Public Transportation Act of 2008 into the House of Representatives on May 28, 2008; by June 20, nineteen additional Representatives signed onto the bill as cosponsors. The bill passed the House vote with 321 in favor 98 opposing on June 26 and was introduced to the Senate the following day. This bill would authorize additional funds for certain operating expenses for mass transit systems in urbanized areas of 200,000 people or more and expand the transit benefits requirement to all Federal agencies. The bill will expire at the close of the 110th Congress at the close of 2008 (Oberstar, 2008; Participatory Politics Foundation & Sunlight Foundation, 2008).
- Rep. Jim Oberstar (who introduced H.R. 6052, as noted above) was considered to be on President-Elect Barak Obama’s short list for U.S. Secretary of Transportation; however Minnesota Public Radio reports, “Rep. Jim Oberstar, D-Minn., said it's unlikely he would accept an offer to serve as U.S. Secretary of Transportation. But the eighth district Democrat is stopping short of saying he’d turn down the job. Oberstar Chairs the House Committee on Transportation and Infrastructure. Some pundits suggest he could be near the top of the list for Transportation Secretary in an Obama administration.” Many pundits believe someone consistent with Oberstar’s transportation policies is what could be expected for the Obama administration’s Cabinet (Kelleher, 2008).
- The White House, currently still under the Bush Administration, issued a statement in opposition to H.R. 6052 saying, “The long-standing Federal role in mass transit has been to support capital infrastructure construction and maintenance, as authorized within comprehensive surface transportation legislation. Operating assistance has traditionally not been an eligible expense in larger urbanized areas under the Federal mass transit programs. While this bill may induce additional transit ridership, it would penalize efficient operations by creating a perverse incentive to incur operating deficits to trigger grant funding eligibility. Federal subsidies should encourage improvement in operating efficiencies, not penalize such efforts; otherwise, transit operators risk becoming permanently reliant upon this type of assistance. Moreover, expanding transit benefits to additional Federal employees would require agencies to reduce programs and services to fund this mandate” (Executive Office of the President Office of Management and Budget, 2008).
- “The Older Americans Act (OAA) is the backbone of services to America’s aging population, helping seniors to stay healthy, independent, and in their communities. It covers a wide range of programs that include home-delivered and congregate meals, senior centers, ombudsmen, in-home services for frail elderly, family-caregiver support, health promotion, grant programs for Native Americans and community-service employment for low-income seniors. For years OAA funding has not kept pace with inflation or the growing number of seniors who need its services.” In response to the OAA, President-Elect Obama says, “‘I have been an active supporter of Senate efforts to increase funding for the Older Americans Act and the vital services it provides to our nation’s seniors. I have advocated for at least a 10 percent increase in funding for OAA programs, and as president, I will continue to support increasing funding for the OAA’” (Leadership Council of Aging Organizations, 2007).

4. **Ohio legislators may be influenced by other state legislatures who are taking steps to increase funding for senior transportation efforts within their states.**
    - "Recognizing the need for elder mobility, recent Virginia legislation (House Bill 110) requires all state agencies to include the needs of older citizens in their strategic plans. According to VDOT and AARP information, one in five Virginians older than 60 are not licensed to drive and on any given day 50 percent of elder non-drivers stay at home because they lack transportation …. Aging Together, a five-county partnership that includes Madison, is helping to coordinate transportation resources across the entire region in collaboration with a number of other organizations. Through new state funding a mobility manager will collect transportation resource information and work with organizations to establish a one-call center for connecting riders and transportation. This grant also provides for a mobility specialist to help seniors or people with disabilities arrange and use transportation. In addition, Aging Together has received funds to help expand volunteer transportation networks including in Madison" (Poris, 2008).
    - In New Jersey, State Assemblyman Wisniewski says, "'The state has thousands of senior citizens on fixed incomes and limited mobility who absolutely rely on state-funded transportation programs to survive,' said Wisniewski, chairman of the Assembly Transportation, Public Works and Independent Authorities Committee. 'To combat record high fuel prices and prevent curtailing of essential senior services, we must increase the amount of funding these programs receive.' Wisniewski (D-Middlesex) is the sponsor of legislation (A-2046) that would increase the annual appropriation for 'The Senior Citizen and Disabled Resident Transportation Program' from 7.5 percent to 8.5 percent of the revenue deposited in the Casino Revenue Fund. According to Wisniewski, increasing funding by 1 percent would more easily allow the transportation programs currently in place to absorb the cost of near-$4-a-gallon fuel while neither curtailing existing service nor impacting other programs funded through the Casino Revenue Fund" (Sverapa, 2008).
    - A new bill passed in the Kentucky legislature will allow for a new model for senior transportation. "Folks pay an annual membership fee of around $50. They then pay a per-ride fee of $4-7 plus $1/mile. Individuals who don't have much money can donate their car to the program's vehicle pool, and then they get ride credits for the value of the car. Affiliate groups in the 8 other cities that have adapted this model have also gotten businesses, such as pharmacies, banks, and doctors' offices, to sponsor the service for low-income folks." This is an attractive model for legislators because it does not use tax-payer funds yet still addresses the problems associated with transporting seniors – namely, "it gets folks off the road who may be unsafe drivers, it allows fewer vehicles to transport more people, and it encourages ridesharing because shared rides decrease costs for the consumer" (Coalition of the Advancement of Regional Transportation, 2008).

5. **Although federal and state legislation has a clear impact on senior transportation, local municipalities which are charged with the task of making these plans a logistical reality can face significant obstacles along the way.**
    - Many philanthropic leaders praise the election of President-Elect Barak Obama yet many recognize that due to economic realities, many campaign promises will go unmet. "What's more, several of them cautioned that despite the election of Mr. Obama, charity

advocacy efforts need to continue. Jane Wales, president of the Global Philanthropy Forum, in San Francisco, warned that when Bill Clinton was elected president, foundations cut grant making for nuclear nonproliferation efforts believing — incorrectly — that the Clinton administration would handle the issue. Mr. Steinbach, of the Hewlett Foundation, echoed her comment: ‘We’re not in a situation that’s mission accomplished,’ he said” (Wilhelm, 2008).

- According to the Ohio Department on Aging, the State Plan for 2008-2011 places an emphasis on the coordination of transportation services. “ODA’s promotion of mobility options is mainly focused on improving coordination among state-level agencies that fund transit and human services transportation. Federal and state policies, funding restrictions, regulations, reporting requirements, and service specifications are often major barriers to local coordination” (Ohio Department of Aging, 2007).
- “‘One of the fundamental roles of the DMV is to ensure drivers are capable of driving safely, and to restrict, suspend or revoke licenses when drivers demonstrate that they are incapable of driving safely,’ says Neil D. Schuster, president and CEO, AAMVA [American Association of Motor Vehicle Administrators]. ‘But our charge is also to help people transition to alternative forms of transportation when driving is no longer a safe option. And AAMVA is placing renewed emphasis on these issues’” (Centers of Excellence, 2008).

6. As the demographics of Ohio’s population shifts, the federal, political power is likely to shift as well.

- “The total Ohio population remains relatively stable through 2030, showing only a 70,000-person increase, or a total growth of 0.6 percent for the 25-year period. The projected increase in total U.S. population is 17.4 percent for the same period. Due to very small population growth, Ohio will represent a smaller portion of the total U.S. population in the future. This may reduce the relative power of the state at the federal level, with possibly fewer congressional seats and reduced proportional per-capita funding” (Ohio Department of Aging, 2007).
- Much political attention is paid to Ohio, especially during a national election because it is currently listed among the “swing states” and carries a large number of Electoral College delegates. “[W]e all seem to forget how important the state of Ohio is when it comes to politics. We are a true battleground state. When the media became tired of Florida during the 2000 presidential elections, they shifted their focus to us for 2004. We might not matter when it comes to a lot of things (sports, for instance), but we matter when it comes to politics” (Steer, 2006). As Ohio’s population fails to keep pace with the rest of the nation or even decreases, the political clout associated with the state will decrease slightly.
- “At a time when federal, state, and local elections are often decided by small voting margins—with candidates frequently locked in ferocious competition for the ballots of those ‘voting blocs’ that might turn the electoral tide in their favor—one large and growing bloc of voters has been consistently overlooked and politically underestimated: New Americans. This group of voters and potential voters includes not only immigrants who have become U.S. citizens (Naturalized Americans), but also the U.S. born children of immigrants who were raised during the current era of large scale immigration from Latin America and Asia which began in 1965 (the Post 1965 Children

7. **Legal liability and insurance coverage are ongoing concerns of organizations that focus on transportation.**
   - "Ohio state laws require that consumers follow a Financial Responsibility law requiring each driver to obtain an auto insurance policy providing coverage for bodily injuries or property damage to other persons in case of an accident" (Online Auto Insurance Ohio, 2008).
   - "The GCRTA [Greater Cleveland Regional Transit Authority] is self-insured for public liability. The GCRTA also operates a self-insurance program for workers' compensation claims and to pay certain health care claims. Claims are normally paid with the general operating revenues of the GCRTA. The GCRTA, by resolution of the Board of Trustees, established an insurance reserve in fiscal year 1980 to accumulate funds to satisfy catastrophic or extraordinary losses. This insurance reserve totaled $5.2 million as of December 31, 2006. GCRTA purchased catastrophic loss insurance to protect the Authority's assets against catastrophic losses. This umbrella liability coverage is in the amount of $75 million per occurrence in excess of the $5 million self-insured retention" (Hendrix & Fairfax, 2007).
   - Even with a liability insurance policy, an organization may not be assured of coverage in every situation. In 2000, the Sixth Circuit Court of Appeals ruled *M/G Transport Services, Inc. v. Water Quality Insurance Syndicate*, which was being appealed from a lower Cincinnati court. Among several legal issues in the case presented before the court, M/G had sued WQIS for not defending or reimbursing the costs of a settlement on a frivolous liability charge. The court affirmed what previous courts had ruled – that the insurance policy was not legally binding. "Ohio law provides that where, as here, a policy does not obligate an insurer to defend against frivolous claims, a court may consider events outside the pleadings to determine the duty to defend." In this case, the afore mentioned events outside the pleadings of misconduct on the part of M/G led the court to decide that the insurance provider did not have a binding duty to defend (M/G Transport Services, Inc. v. Water Quality Insurance Syndicate, 2000).

8. **Local municipalities and counties in the Northeast Ohio region have a track record for cooperation and collaboration.**
   - "NOACA [Northeast Ohio Areawide Coordinating Agency] serves as a forum of local public officials for regional debate and intergovernmental cooperation. It encourages local decision-making in harmony with the regions' transportation and environmental plans by maintaining federal designation and planning processes and meeting federal and state guidelines for regional programs. NOACA seeks equitable return of federal and state money in the region for meeting locally determined needs by providing informational and planning support for the benefit of member communities and

advocating the interest of the region with state and federal decision- makers” (Northeast Ohio Areawide Coordinating Agency, 2008).

- Connections 2030, a product of NOACA that was last amended in May 2007, prioritizes ten strategic goals for the area around issues of transportation and the environment. Goal 5 shows a commitment to serving transit-dependent residents, whether they are dependent due to age, disability, or poverty. “Goal 5: Improve the transportation mobility of the transit-dependent and low-income individuals to jobs, housing and other trip purposes” (Northeast Ohio Areawide Coordinating Agency, 2005)
- The Cuyahoga County Mayors and City Managers Association is a group of the municipal leaders in the county. In 2006, the group struck a deal known as the “no-poaching” resolution, which was a “handshake agreement among suburban mayors not to steal each other’s businesses by dangling sweet-deal tax breaks across municipal boundaries” (O'Malley, 2008). Although recently there has been an accusation of breaking this nonbinding agreement, the fact that there is such a resolution demonstrates a desire for cooperation.

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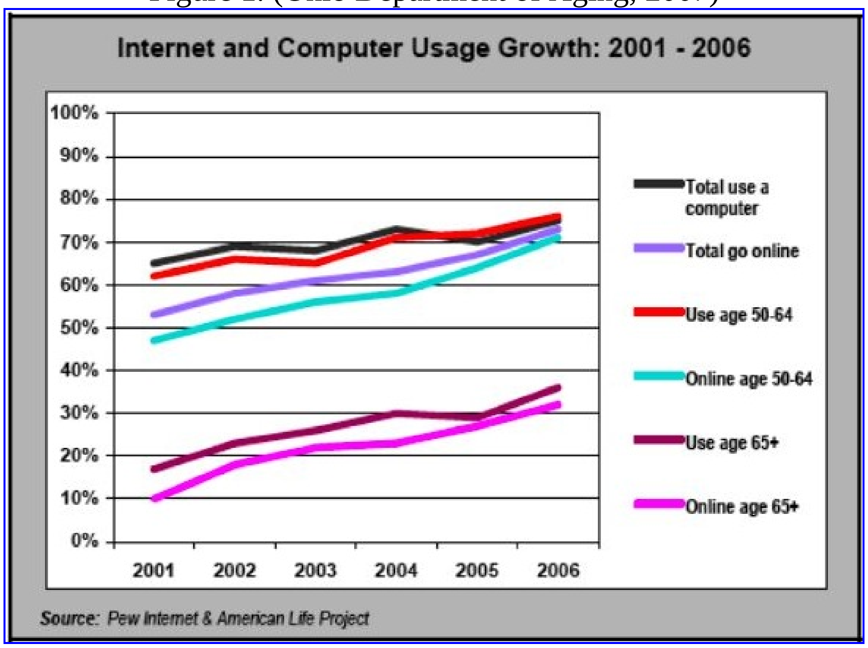
1. **Older adults (and baby boomers who are only starting to enter the senior phase of their life) are adapting to the changing face of information and communication technology.**
   - "Use of computers by persons age 65 and older has grown from 17% in 2001 to 36% in 2006. Access to the Internet will greatly change the manner in which elders seek and obtain information about programs and services to address their future needs. Instead of information being 'pushed' out as printed documents, the Internet allows older adults to 'pull' the information when they need and want it, and in the comfort of their own homes and communities" (Ohio Department of Aging, 2007).
   - Studies of computer and Internet usage show that older adults (ages 65 and older) have steadily grown between 2001 and 2006. Computer and Internet usage among baby boomers (ages 50 to 64) have also increased at a similar rate. By 2006 more than 70% of baby boomers had fairly regular usage of both a computer and access to Internet. In the same year one third of older adults also showed fairly regular usage of both a computer and Internet (Ohio Department of Aging, 2007).

Figure 1. (Ohio Department of Aging, 2007)



   - "Boomers represent the first aging population that has been exposed to, and enjoys, the ever-changing technology of today. They may retire, but they will not be out of touch …. Boomers possess a questioning nature. They will create an aging population with a great deal of computer skills and knowledge" (Ohio Department of Aging, 2007).
   - Baby boomers' (age 50 to 64) computer and Internet usage in 2006 both grew to nearly match the percent usage of the total population, as seen in Figure 1. As populations age, organizations and agencies servicing these tech-savvy seniors will have to adapt (Ohio Department of Aging, 2007).

2. **Transportation coordination software continues to improve the way transportation is coordinated across the nation.**
   - "Appropriately applied, transportation coordination leads to significant operational improvements and cost reductions, including: lower per trip operation costs; less overall workload; standardizing reporting and data management capabilities; maximized relative scheduling and routing efficiency; increased security; increased customer service; and a significant decrease in technology costs. Intelligent Transportation Systems (ITS) have not only become very sophisticated and effective at supporting complex coordination issues, but new transportation technology is now easy to implement and operate at a price point that can fit into any transportation budget" (RouteMatch Software, 2007).
   - Computer software can better help transportation coordination providers provide better services for their clients. For example, in 2004, Ride Connection, a nonprofit transportation coordinating agency, announced its choice of RouteMatch software to aid in the growth of the organization. In the press release Ride Connection said, "RouteMatch TS will help facilitate transportation coordination between Ride Connection and its service providers through information exchange such as number of rides provided, trip costs and vehicle mileage. Additionally, RouteMatch TS will ease reporting pains, reduce overall workload, automate data, improve scheduling and improve customer service--all key aspects involved in efficient transportation coordination" (Business Editors, 2004).
   - Computer software can provide a number of services vital in coordinating the transportation of the elderly and disabled. For example, "Route Coordinator, new desktop paratransit software using breakthrough technology for routing and trip coordination, helps even the smallest community economically provide rides for the elderly and disabled. With an aging population, the need for paratransit services is going to grow. Route Coordinator will allow transits offices to better manage and maintain trips for the elderly and disabled" (Fawcett, 2008).
   - Senior Transportation Connection of Cuyahoga County is currently implementing a new software program called Easy Rides developed by Wyoming-based Mobilitat (http://www.ionicdesign.com/mobilitat/), which was awarded the "Most Innovative Product Award" by the Governor of Wyoming in 2003 (Studio Graphique, Inc., 2006).

3. **The use of GPS tracking in vehicles and cell phones show promise for the future.**
   - In an article entitled "Unforgettable Harvest; Our best-managed nonprofit is feeding more people for less," Forgotten Harvest was named Best Managed Nonprofit by *Crain's Magazine* in 2007 because "Forgotten Harvest in Oak Park, has devoted, time, effort and thought to [its mission]. That has meant, among other things, increasing capacity temporarily while permanent solutions were still being executed, and creative use of technology." Among the technologies employed by Forgotten Harvest is that it has "equipped [vehicles] with global positioning satellite technology to assist in routing drivers for expeditious pickups and deliveries." Due to "its use of advanced technology to support its efforts, Forgotten Harvest is viewed as a national model, said Cornelius Henderson, Michigan field services representative for America's Second Harvest," a nationally respected like organization (Begin, 2007).

- Researchers from the University of California, Berkeley with Nokia Research Center recently tested for the first time new GPS technology equipped in cell phones in gather traffic data and mapping the quickest route to take. Previously, cell phones could be used to locate a person through triangulating a signal from cell towers. Global Positioning technology may change the way transportation coordination is done and can be made more efficient. “Using the GPS data to estimate prevailing speeds and travel times, researchers were able to obtain a picture of real-time traffic conditions. Current traffic monitoring systems primarily rely upon pavement-embedded sensors, roadside radar or cameras. The high cost of installing and maintaining such systems has restricted their coverage to limited stretches of highway. ‘For state transportation agencies such as Caltrans, tapping into the vast network of cell phones on the road could one day reduce costs of investing in expensive infrastructure to obtain traffic information,’ said Randell Iwasaki, Caltrans chief deputy director. ‘This will greatly expand the coverage of traffic information services so motorists can better plan their trips right on their cell phones.’ … The goal of the experiment was not only to test the efficiency of the traffic data collection and aggregation system, but to also evaluate the trade-offs between traffic estimation accuracy, personal privacy and data collection costs” (Machines Like Us, 2008).
- The success of the February GPS tests spurred on the November 2008 release of downloadable software for everyone’s cell phone in the San Francisco Bay and Sacramento areas. As more people take advantage of the software, more data of drivers is being compiled making the traffic estimations more accurate and reliable. Researchers recognize the reluctance of some people to allow themselves to be pinpointed by GPS every three seconds. For the sake of privacy, this GPS technology can be disabled on the phone. “Traffic monitoring is nothing new. Companies such as Inrix and Navteq accumulate traffic data using sensors embedded in streets and in toll booths, and from GPS sensors on vehicles like FedEx delivery trucks and taxis. This information is fed to in-car navigation systems and used by websites such as Google Maps, Mapquest, and traffic.com to provide live traffic data. But the problem with existing systems, says Bayen [professor of civil and environmental engineering at UC Berkeley], is that they only account for certain roads. Road-based traffic sensors show highway traffic conditions well enough, he says, but do not show conditions on many side roads. The Berkeley project, called Mobile Millennium, will fuse static sensor data provided by Navteq with cell-phone data from (hopefully) thousands of drivers across the Bay Area. Part of the project's goal, explains Bayen, is to better understand how to use traffic data collected by cell phones--essentially a giant sensor network--for traffic prediction” (Greene, 2008).

4. **Electronic mail is a quick and inexpensive way for nonprofits to keep in touch with constituents; however, e-mail tools are not being used to their fullest capacity by most nonprofits, sector-wide.**
    - "Although social networking sites like Facebook and YouTube are getting a lot of attention these days, they still can't compete with email as a tool for your organization to reach and mobilize supporters. Likewise, your organizational website, banner ads, Google adwords, and other promotions may be stellar, but they all rely on your supporters to come to you. With email – you go to your supporters where they are, delivering your message right to their inboxes. As a result, email messaging remains the online marketing tool of choice for the majority of nonprofits" (Dijulio, Matheson, Bosanko, Ewald, Simon, & Ross, 2008).
    - E-mail and E-Marketing tools, such as Constant Contact or iContact, are new, cost-effective ways for nonprofits to see a larger return on their technology-based marketing investments. "'I've heard hundreds of success stories from small businesses all over the Denver area whose email marketing programs have had an immediate impact on growing profits and bringing in new business opportunities,' said John Arnold, Denver regional development director for Constant Contact. 'These workshops are designed to help small businesses and nonprofits take the first step in finding out how email marketing can help them and why it's so effective'" (Constant Contact, 2006). Furthermore, "The organizations emphasized several important benefits they realized by using an email marketing service for their membership communications, including reporting and tracking capabilities (74 percent), reduced effort (44 percent) and reduced cost (34 percent)" (Constant Contact, 2005).
    - "Nonprofits and associations using an email service for member communications reported higher open, click-through, and overall response rates over the last twelve to twenty-four months, according to a recent survey conducted by Constant Contact®, an email marketing service for small and medium businesses and associations. These results - collected from more than 500 nonprofits, associations, and membership organizations across the U.S. - demonstrate that email outreach is having a positive impact on member communications efforts for these organizations, including fundraising, event promotions, and membership recruitment initiatives …. 'The higher open, click-through, and overall response rates our nonprofit and association users are reporting demonstrate that email is working for them as a strategic communications vehicle for development and member communications efforts,' said Janet Muto, vice president of market development, Constant Contact, who oversaw the research efforts for this study. 'Overall, this survey shows how invaluable it is for nonprofits and associations to maintain consistent contact with members'" (Constant Contact 2005).
    - The 2008 eNonprofit Benchmarks Study showed some small changes between 2006 and 2007. "Email open rates, click-through rates and response rates have fallen from 2006 to 2007, across all issue areas. Open rates have fallen nearly 4 percent on average, from 21.3 percent to 17.6 percent, and click-through rates have dropped approximately 1 percent, from 4.9 percent to 3.8 percent" (Dijulio, Matheson, Bosanko, Ewald, Simon, & Ross, 2008).
    - "The need for nonprofits to look at technology as a cost-saving mechanism is becoming increasingly important as resources continue to shrink …. Technology saves money and helps nonprofits get to their customers in better and faster ways" (Begin, Nonprofit

Enterprise tries for-fee programs; Expects to double its licensees by end of 2008, 2007).

5. **In the height of the Information Age, the World Wide Web is increasing the amount of information available to the general public about individual organizations, forcing nonprofits to be far more transparent in all areas of organizational management.**
   - "An organization's completed Form 990 and Form 990-EZ, and the Forms 990-T of 501(c)(3) organizations, are available for public inspection as required by section 6104" (Internal Revenue Service, 2008). Fiscal accountability is greatly increased by making IRS Form 990's available to the general public free of charge through websites such as http://www.GuideStar.org.
   - Governance of nonprofit organizations is being carefully scrutinized by watchdog groups who make their recommendations and ratings a matter of public record. "Charity Navigator gives the organizations it evaluates overall ratings of zero to four stars, which are determined by taking the groups' scores on short-term spending and long-term viability and comparing them with other charities in their fields…. [Rich Cowles, Executive Director,] cautions, however, that donors shouldn't make giving decisions based solely on Charity Navigator's ratings. 'Anytime you reduce organizations to ratings, it becomes simplistic,' says Mr. Cowles. 'It's important for donors to bear that in mind and use it as a tool.' … 'We can tell you how efficiently the Ocean Conservancy is spending your money this year,' says Mr. Stamp [, founder of Charity Navigator]. 'We can't tell you how clean the Ocean Conservancy got the ocean'" (Wallace, 2002).
   - "Nonprofit organizations are pushing for transparency by putting more federal documents, databases, and video on the Web. It's rich information, but it could overwhelm users who aren't familiar with the depths of the Web. So once this data is released, creative individuals and organizations should find ways to make all this information easy to understand and use" (*The Boston Globe Editorial*, 2008).

6. **Computer and information technologies are changing the way people think about and contribute to nonprofit organizations.**
   - "The technology exists to enable nonprofits to demonstrate accountability and constituents are beginning to expect this level of information. With so many nonprofits competing for the attention and dollars of constituents, incorporating accountability messages and soliciting the help of the accounting teams can have a positive impact on fundraising results" (Accounting Today Staff Writer, 2008).
   - "Thanks to a personalized Web page and her own diligent e-mail outreach to donors, Burns has raised $5,000 for heart and stroke research. Called 'e-volunteering' or 'cyber-service,' such efforts have emerged as a way for time-strapped people to contribute to a cause by logging on to their laptops and desktops in their scarce available hours. While not leaving their homes or offices, e-volunteers might mentor at-risk children, craft grant proposals for a nonprofit organization, or lend financial, legal, or marketing skills to a favorite cause …. Burns, a Back Bay resident who is finishing a master's degree in intercultural relations while working at MIT and also teaching aerobics again, says the opportunity to be an e-volunteer 'has made it so much easier.' That was the idea when the heart association launched the online program five years ago, according to Rich Proulx, director of customer systems. 'Everybody has a busy lifestyle,' Proulx says. 'It's very easy to do. Just think how easy it is to do an online debit card or credit card. And it's live

24-7, so they can do it at their convenience. We deal with a lot of nurses and doctors, and they work a lot of weird hours, so this makes it easier for them to access the website.'" (Aucoin, 2007).

- "Young children and teenagers across the nation are getting involved in philanthropy more than ever, according to research and nonprofit experts, who credit new technologies with the rise of the trend. As young people increasingly become exposed to and connected with the problems of the world via the Internet and television, experts said, parents are finding new ways to instill in their children the value of giving. At the same time, technology is democratizing philanthropy so giving is not only easier for people of all ages and means, but also trendier. And children are starting to organize at the grass-roots level to give. 'We've globalized technology, we've globalized commerce, but we haven't globalized compassion,' said Craig Kielburger, founder of Free the Children, a nonprofit network of kids helping kids. 'But we're seeing a generation of kids, ages 10 to 15, who are aware of global problems, and they're really searching to help. The next step is to help kids move from that awareness to action.'" (Rucker, 2007).

7. **In addition to the traditional Internet where an administrator posts information for others to read and use, a new, more interactive form of the Internet has emerged, known as Web 2.0, which is changing how users of the Internet interface with the technology.**
   - "The Web is slowly but steadily undergoing a metamorphosis as more and more users are able to create, share, and distribute content on the Web. This shift toward "user generated" content represents one of the biggest changes of the Web since its inception in the early 1990's. This paradigm shift has resulted in a surge in popularity of Web sites that enable users to build social networks and share content. Today, user generated content available on the Web includes textual information contained in Weblogs (blogs), photos on sites such as Flickr and Facebook, and videos on sites such as FlixHunt and YouTube. Collectively, these types of web sites are referred to in the media as Web 2.0 (to distinguish these from the so-called Web 1.0 sites that host content from established providers). Web 2.0 changes how users participate in the Web. Instead of consuming content posted by a single administrator, users are now able to post their own content and view content posted by their peers. Some Web 2.0 sites, for example MySpace and Facebook, promulgate social networking by allowing individuals with similar interests to form social groups. Tagging, a feature that allows users to associate words or phrases ('tags') with content they post or view on a Web page, is extensively used on some Web 2.0 sites to categorize and organize content. Adoption of Web 2.0 has been widespread, with users of all ages participating in posting as well as viewing content. The diversity of participants in Web 2.0 is possible because of the low barrier to entry into these online communities. Many Web 2.0 sites are designed such that signing up and posting content are relatively easy. This enables users who may not be technically savvy to participate along side more experienced users" (Gill, Arlitt, Li, & Mahanti, 2007).
   - Participation in Web 2.0 sites is at an all time high. For example, "YouTube, the world's largest UGC [User Generated Content] site, serves 100 million distinct videos and 65,000 uploads daily" (Cha, Kwak, Rodriguez, Ahn, & Moon, 2007).
   - Storage capacity for traditional Internet hosts is becoming an ongoing issue as Internet users, both individuals and corporations, add multimedia to traditional websites. "User

interest in multimedia content is not new; what has changed is the availability of content. In the traditional Web, the availability of interesting multimedia content was often limited (free or otherwise). Only in recent years has multimedia content began to appear online, as business models were put in place (e.g., iTunes). With Web 2.0, social networking effects can result in large user communities growing around a service. Given the relative ease with which a person can now create digital content (text, photos, videos, etc.), coupled with human interest in retaining such information indefinitely, it seems that there is sustainable demand for continued growth in storage capacity. For example, YouTube receives an estimated 65,000 new videos per day; with an average size of 10 MB for each video, this means YouTube's video repository grows by approximately 19.5 TB per month!" The scarcity of available free space may force those wishing to add multimedia elements to web pages to develop creative solutions (Gill, Arlitt, Li, & Mahanti, 2007).

8. **New online developments in social networking are changing the way nonprofits market themselves to the public, raise funds, attract clients, and increase public awareness.**
   - As younger generations are maturing and entering the work force, they are brining their ties to social networking sites with them. For example, Facebook, originally targeted for college students has drastically broadened its client base as college grads have entered the work place. These Facebook users invite coworkers to join, thus broadening the Facebook base. Several nonprofits have identified such social networking sites as potential markets for marketing awareness and attempts in fund raising.
   - Some foundations are beginning to test the potential of using Internet social networking sites as opportunities to gauge interest and funding. In 2007, the Case Foundation donated grants to nonprofits that were able to attract the greatest number of unique donors, not the greatest number of donations, through the use of the Causes application on Facebook. "'Philanthropy shouldn't be defined as a bunch of rich people writing big checks,' said Jean Case, who founded the Case Foundation with her husband, Steve, founder of America Online. 'Small amounts of money given by large numbers of individuals can be combined to do great things …. We've always asked how we can leverage our resources to engage a larger population, how can we get the most Americans involved in charitable giving and action,' Ms. Case said" (Strom, 2007).
   - Beyond providing forums for awareness, these sites also provide opportunities for advertising which has been met with some mixed reviews. "Advertising on social-networking sites appear particularly vulnerable, analysts say, because advertisers are still searching for the right ways to measure the effectiveness of ads on those sites. Advertisers say that buying ads on Facebook and MySpace generally costs far less than buying premium ads on media properties such as Yahoo Inc or Time Warner Inc.'s AOL, although prices vary widely based on the type of ads and the target audience" (Vascellaro, 2008).

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