

***HOW TO MEET OPERATIONAL CHALLENGES
OF PROVIDING TRANSPORTATION TO SENIORS***

***A WORKBOOK
FOR
FAITH IN ACTION MEMBERS***

***PREPARED BY
THE BEVERLY FOUNDATION
PASADENA, CALIFORNIA***

FEBRUARY 2008

This workbook is an outgrowth of the 2007 Beverly Foundation STAR Search Survey and STAR Awards program organized in partnership with *Faith in Action*. In addressing the ten recommendations that resulted from the STAR Search survey, it provides practice resources related to critical challenges that face volunteer driver programs.

The following topics are included:

- Program Priorities
- Reporting Capacity
- Transportation Literacy
- Linking Relationships
- Funding Options
- Infrastructure Reduction
- Service Assistance
- Insurance
- Driver Recruitment
- Senior Friendliness

The purpose of the workbook is to provide conceptual and operational information and materials to support the efforts of members of *Faith in Action* that provide transportation to older adults. The workbook was prepared for *Faith in Action* members attending the 2008 National Conference workshop on Providing Transportation Services to Seniors in Phoenix, Arizona.

The Beverly Foundation
Pasadena, California
© Beverly Foundation

TABLE OF CONTENTS

CONTENTS	PAGE
Introduction	iv
STAR Search 2007 Executive Summary	v
The Workbook:	1
Attention to Operational Challenges	
#1 Design and Service Priorities	2
#2 Reporting Capacity	4
#3 Transportation Literacy	6
#4 Linking Relationships	8
#5 Multiple Funding Options	10
#6 Infrastructure Reduction Methods	12
#7 Transportation Assistance Methods	14
#8 Attention to Insurance	16
#9 Volunteer Driver Recruitment	18
#10 Senior Friendliness	20
Attachments	
Attachment 1: Definitions and Useful Links	23
Attachment 2: Results of STAR Search Survey	27
Attachment 3: STAR Awards for Excellence	39
Attachment 4: List of 2007 STAR Search Respondents	45

INTRODUCTION

The 2007 STAR Search survey documented 225 *Faith in Action* transportation programs; provided considerable data on transportation program operations; discovered a host of reasons why providing transportation is a central role of *Faith in Action* programs; and clarified many of the challenges *Faith in Action* programs face in providing transportation.

It was evident from the study that *Faith in Action* provides an enormous amount of transportation service and makes a tremendous contribution to older adults across America. While many *Faith in Action* transportation programs provide a large number of rides to many members of the community, others only provide a limited number of rides to a few individuals. And, most do this with limited infrastructure, limited staff, and limited resources. Such programs often do not view themselves as well funded and well oiled machines that provide transportation. Rather, they see themselves as meeting their bottom line objective of providing rides that relates to their top line objective of enhancing quality of life. It is this top line objective that is most often expressed when services discuss the relationship of providing transportation to seniors to the mission of the organization.

However, it must be said that doing good does not always go hand in hand with organizational efficiency and effectiveness. Recommendations were made in the 2007 STAR Search Report that provided guidance to *Faith in Action* transportation programs that can enable them: (1) to be viewed as legitimate transportation services that mobilize a tremendous resource of volunteers; and (2) to be able to sit at the transportation table knowing full well that they can play a meaningful role because they “know their stuff.” The workbook addresses many of these recommendations.

The ten sections of the workbook include information and discussion related to recommendations from the report; a summary discussion, and a sample practice activity. The first and last sections address conceptual information relevant to organizing and evaluating volunteer driver programs. Also included are an introductory executive summary and concluding attachments related to STAR Search 2007.

EXECUTIVE SUMMARY

STAR 2007 SEARCH REPORT

STAR Search Program The purpose of the Beverly Foundation's annual STAR Search program is to demonstrate to policy makers and service providers the importance of STPs (Supplemental Transportation Programs for seniors). The surveys gather information about STPs that include both paid and volunteer driver programs that provide transportation services to seniors. In conjunction with the survey, STAR Awards for Excellence are given to programs that meet specific criteria. The STAR Search survey was first undertaken in 2000 and has continued annually since that time.

The Project In early 2007, the Beverly Foundation entered into an informal partnership with the *Faith in Action* National Program Office at the Wake Forest University School of Medicine in Winston-Salem, North Carolina. The purpose of the partnership was to undertake a survey of volunteer driver transportation programs (STPs) within the *Faith in Action* network that provide transportation to seniors. While the Beverly Foundation was the major research entity of the partnership, *Faith in Action* provided contacts with its members and transportation providers, mailed the survey, and participated in the selection of STAR Award winners.

The Methodology The 2007 STAR Search survey and awards process was planned in January, undertaken in April, and completed in July of 2007. Distribution of the survey was undertaken by *Faith in Action* National Program Office. Surveys were mailed to 500 members of the *Faith in Action* network believed to sponsor and/or operate transportation programs. Following the receipt of the surveys, a data entry and analysis effort was undertaken by the Beverly Foundation. The Beverly Foundation invited *Faith in Action* National Program Office and experts in aging and transportation to select winners for two STAR Awards and ten Special Recognition Awards.

Results of the Survey 225 transportation programs from 42 states, the District of Columbia, and Puerto Rico responded to the survey. The survey results include numerous charts and graphs that present responses to questions on key issues related to senior transportation and what was learned about STPs in the *Faith in Action* network.

STAR Awards for Excellence As part of its commitment to the STAR Search effort, the Beverly Foundation allocated funds for making two STAR Awards for Excellence to the "best of the best" *Faith in Action* STPs and ten additional Special Recognition Awards. All survey respondents had an opportunity to be selected for an award if they met the following criteria: (1) provide transportation to older adults; (2) include volunteers in their driver pool; (3) be in operation for two years or more; (4) prepare a brief statement on their transportation mission; and (5) be a recipient of a *Faith in Action* grant from the Robert Wood Johnson Foundation.

General Themes The ten major themes that resulted from the survey are presented below. They are specific to the 225 survey respondents and may not apply to *Faith in Action* programs in general.

Universal Purpose *Faith in Action* programs focus on providing assistance such as transportation so that people, especially seniors, can enjoy a dignified independence and remain in their homes and in their community.

Formation *Faith in Action* programs tend to have been established in the 1990's and 2000's which suggests a relationship with the Robert Wood Johnson Foundation funding.

Low Cost Approach *Faith in Action* programs provide transportation programs with limited staff, limited infrastructure, and limited financial resources.

Menu of Services *Faith in Action* programs tend to offer a variety of services, only one of which is transportation.

Passenger Population *Faith in Action* programs provide transportation to older adults, but many also provide transportation to people with disabilities.

Terminology *Faith in Action* programs tend to be more comfortable with human service terminology than with transportation terminology.

Senior Civic Engagement *Faith in Action* programs engage volunteers to drive, a majority of whom are in the 65+ age group.

Linkages *Faith in Action* programs tend to have a variety of linkage relationships with human service providers, but very few linkages with transportation providers.

Record Keeping *Faith in Action* programs face many challenges regarding record keeping, especially in identifying the number of staff, riders, drivers, and the annual program budget which may be related to their tendency to be part of a menu of services.

Safe Driving *Faith in Action* programs tend to approach safe driving in a manner beyond traditional behind the wheel activities because many responses suggested training in helping passengers.

Recommendations The survey analysis identified a number of challenges and resulted in a variety of recommendations. They include recommendations related to: (1) linkage relationships; (2) accurate reporting capacities; (3) transportation literacy; (4) cost reduction; (5) driver recruitment; (6) leveraging resources; (7) insurance and risk management; (8) funding; (9) civic engagement; and (10) universal purpose.

Attachments Additional information from the 2007 STAR Search report is included in attachments which report the results of the survey, the Beverly Foundation STAR Award winners, and the list of respondents to the survey.

THE WORKBOOK
ATTENTION TO OPERATIONAL CHALLENGES

Workbook Topic #1

Design and Service Priorities

Every volunteer driver program has a mission. Summarize your mission below.

Now, look at the chart below. Each of the components (and their elements) impacts on a volunteer driver program with respect to infrastructure and administrative requirements, services, passengers, operations and costs.

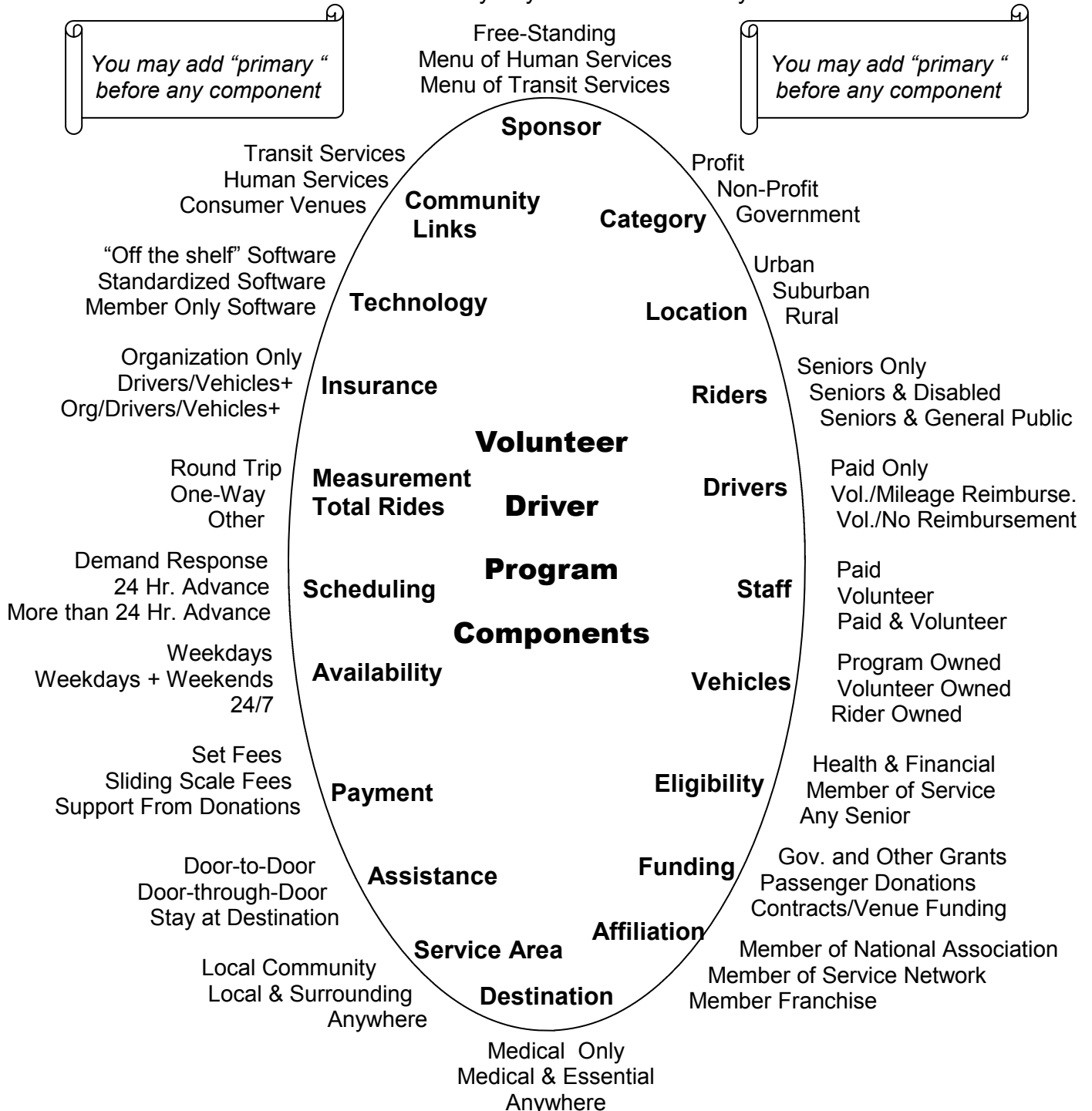
Sponsor free-standing menu of human services menu of transit services	Category profit non-profit government	Location urban suburban rural
Riders seniors only seniors & disabled seniors & general public	Drivers paid only vol. /mileage reimbursement vol./no reimbursement	Staff paid volunteer paid & volunteer
Vehicles program owned volunteer owned rider owned	Funding gov. & other grants passenger donations contracts/venue funding	Passenger Eligibility health & financial member of service any senior
Affiliation member of national association member of service network member franchise	Destination medical only medical & essential anywhere	Service Area local community local & surrounding anywhere
Assistance door-to-door door-through-door stay at destination	Payment set fees for rides sliding scale fees for rides support from donations	Availability weekdays weekdays + weekends 24/7
Scheduling demand response 24 hr. advance more than 24 hr. advance	Measurement Total Rides round trip one-way other	Insurance organization only drivers/vehicles+ org./drivers/vehicles+
Technology “off the shelf” software standardized software member only software	Community Links transit service human service consumer venues	

While your volunteer driver program may not include each of the components and elements in the chart, it is likely that you have given some thought to how these and perhaps others impact on the administrative requirements and service delivery costs of your operations.

Practice Resource #1

Review Your Priorities

On the illustration below, circle an element related to each component that might meet the mission of your transportation service and at the same time hold the potential of reducing program administrative requirements and costs and perhaps even improving the efficiency of your service delivery.



Workbook Topic #2 Reporting Capacity

Recommendation

Develop accurate reporting capabilities (especially in reporting the number of active riders and drivers, budget and one-way rides), to ensure that Faith in Action transportation programs will be considered legitimate transportation services by boards of directors, interfaith groups, community leaders, potential funders, and even riders and drivers.

Survey responses suggested that many *Faith in Action* programs face challenges in reporting program information, especially the number of riders, the number of drivers, and the transportation program budget.

Problem #1: Reporting challenges for riders and budgets may be related to the fact that 97% of the respondents were part of a menu of services, and did not separate their “care receivers” or “total budget” from those of their host or sponsoring organization. For example, the sponsor of a volunteer driver program may have a budget of \$500,000 while the volunteer driver program itself has a budget of \$75,000.

Problem #2: The reporting challenge related to one-way rides appears to be associated with the tendency to only report round trips. This presents major difficulties in accurate calculation of the total number of trips. Accuracy can dramatically increase the number of reported rides and reduce costs per ride.

Problem #3: The reporting challenge related to the total number of active riders and drivers appears to be a function of the “menu of services” organization of volunteer driver programs and the tendency to report all volunteers and all “clients” rather than only transit volunteers and clients. Again, this also presents difficulties in accurate calculations of program activities.

While all three present problems regarding the analysis and reporting of data, they present greater problems in the ability of volunteer driver programs to communicate understandable information to transit services and to the community, especially funding agencies and financial supporters. This is where accurate reporting of number of rides and total budget comes into play. For example, if a program reports its budget at \$500,000 (the budget of its sponsor) and reports 5,000 rides (the number of round trips) it is reporting a cost of \$100 per ride. Alternately, if it reports its actual transportation budget at \$75,000 and its actual number of one-way rides at 10,000 its cost per ride would be \$7.50.

In summary, accurate reporting of key data is central to efficient and effective operation of a volunteer driver program.

Practice Resource #2 ***Enhance Your Reporting***

Calculating the number of current (by year) riders and drivers is fairly straight forward. See the examples below.

Example: Rider Calculation for 2006: Total # of Riders receiving rides in 2006.

Example: Driver Calculation for 2006. Total # of Drivers providing rides in 2006.

Separating the transportation from the general budget when transportation is part of a menu of services also is straight forward. See the example below.

Example: Sponsor Budget \$500,000. Identify the amount of the transportation budget by identifying costs related to operating the transportation program. It should include a percentage of staff costs, as well as other overhead charges.

Calculating the number of rides is critical information for reporting on the operations of the one-way rides (the standard for transportation services). A one-way ride is defined as passenger transport from one destination to another, and thus a single trip may include a number of one-way rides in the form of trip chaining (making several stops in a single trip). For example, in program #1 if the volunteer driver takes Ms. Jones from her home to the doctors office and home the total is 2 one-way rides; and if they also stop at the pharmacy and the grocery store the total is 4 one-way rides.

Example #1: rider's home → doctor's office → rider's home (= 2 one-way rides)

Example #2: rider's home → doctor's office → pharmacy → grocery → rider's home (= 4 one-way rides)

Example #3: Ride Calculation for 2006. Total # of one-way rides in 2006

These examples suggest that: (1) in reporting the annual number of riders and drivers it is important to report the number for a single year; (2) in reporting the annual number of rides it is important to report one-way rides for a single year; and (3) in reporting the total transportation budget, it important to report only the transportation budget rather than the budget for a sponsor that provides other services.

Now consider the following practice:

Calculate your annual budget for 2007: _____

Identify the total number of riders for 2007: _____

Identify the total number of drivers for 2007: _____

Identify the total number of one-way rides for 2007: _____

Calculate the cost per ride for 2007: _____

Example: Total budget (\$50,000) / Total # of one-way rides (5,000) = \$10.00 per ride

Workbook Topic #3

Transportation Literacy

Recommendation

Knowledge of transportation terminology is important to any program that provides transportation, and Faith in Action programs not only need to take the opportunity to educate themselves in transportation terminology but to educate transportation services in human service terminology.

While *Faith in Action* programs have a high level of understanding of human service terminology (e.g. transportation needs and quality of life), transit terminology (trip chaining, one-way rides) does not appear to be part of their vocabulary. This definitional problem was introduced in the discussion of accurate reporting. Terminology also presents a problem for transit services since human service terms (independence, socialization, dignity, and quality of life) generally are not part of their vocabulary.

The following terms are commonly used by transportation providers:

Transit Lexicon

Transit System	Trips (rides)
Public Transportation	Trip Chaining
ADA Paratransit	Farebox
Paratransit (demand response)	Fixed Routes
Transportation Needs and Gaps	Flex Routes
Circulator Routes	

It is also important for transportation agencies to be able to better understand the important work that you do. Below is a list of important terms often used by human services that transportation agencies may not know or use.

Human Service Lexicon

Transportation	Senior
Supplemental Transportation	“Old Old”
Transportation Needs	Activities of Daily Living (ADLs)
AAA	Instrumental Activities of Daily Living (IADLs)

For the definitions and links to references, please see Attachment 1.

Practice Resource #3
Prepare a Transportation and Human Service Literacy List

On the following lines, add other transportation terms that you believe might be useful in strengthening your program's links with transportation services.

Transit Lexicon

On the following lines, add other human service terms that you believe would be useful in educating transportation services the human service sector.

Human Service Lexicon

Workbook Topic #4

Linking Relationships

Recommendation

Develop as many links as possible with transportation services in the community in order to better understand the role of transportation services and to communicate the important role played by Faith in Action transportation services.

Survey respondents were asked to select organizations that represented their primary relationships with human service and transportation service agencies.

Human Service/Transit Service Links

Faith-Based Organization: 89% Area Agency on Aging: 83% Hospital/Health Center: 74% Social Service Program: 72% Volunteer Program: 69% Senior Center/Recreation: 64% Human Service Links: Average 6	Pub Transit Agency: 37% ADA Paratransit Agency: 19% Community Taxi Service: 17% Private Transit Service: 15% Demand/Response: 8% Local DMV: 4% Transit Service Links: Average 1
--	--

As the chart indicates, it is much more likely that *Faith in Action* programs link with human services as opposed to transportation services. The average of six (6) links with human services, and one (1) link with transportation services illustrates the point.

There undoubtedly are many reasons for the tendency to link with human service agencies. Volunteer driver programs: (1) tend to be (or to see themselves) as part of the human service sector; (2) generally are much smaller than transportation services; (3) are called upon to meet special needs; (4) provide a different type and level of service; and (5) often do not know the transportation sector terminology. While there are undoubtedly others, what is important is that *Faith in Action* volunteer driver programs play a critical role in filling gaps by providing services: (1) to places where transit systems don't go; (2) at times when transit systems are unavailable; (3) with drivers who are the friends of passengers; (4) and offering supportive assistance that cannot be provided by many transit services.

The following practice resource is provided to help the reader explore possibilities for expanding linkages with both human services and transportation services.

Practice Resource #4
Enhance your Relationships with
Human and Transportation Services

Use the tables below to identify and develop your linkage relationships with human service agencies and transit services in your community. Find out the name and title of the person with whom you need to establish contact at each organization.

Human Service Agencies

Name of Organization	Contact Person	Title	Phone Number/Email
Area Agency on Aging			
Hospital			
Faith-based Organization			
Retirement Community			
Senior Center			
Adult Day Service			
Social Service Program			
Community Volunteer Prg.			
Other			

Transportation Service Agencies

Name of Organization	Contact Person	Title	Phone Number/Email
Public Transit Agency			
ADA Paratransit Agency			
Paratransit			
Local DMV			
Community Taxi Services			
Private Transportation			
Other			

In order to have productive contacts with transportation services, you need to be able to speak the same “language”. Refer to Workbook Topic #3 for discussion of adapting your terminology.

Workbook Topic #5

Multiple Funding Options

Recommendation

Consider soliciting rider destinations (the clinic, the doctor's office, the grocery store, the hairdresser) for program funding. Some programs solicit donations while others arrange contractual agreements to transport passengers to business locations.

Recommendation

Look to public transportation services for support. Many transit services are beginning to realize that volunteer driver programs are able to provide services for which they were not designed and are not able to provide, and may present an opportunity for support.

Recommendation

Calculate volunteer driver hours and identify them as "in kind" contributions for matching grants and donations, or for making a statement to the community about the dollar contribution of volunteer drivers. Note that \$18.77 is the Independent Sector's 2006 estimate of the dollar value of a volunteer hour, however it varies by state.

The vast majority of *Faith in Action* transportation programs (88%) do not charge fees. However, a significant number (61%) accept donations, and an even greater number (72%) incorporate grants as a source of support. While such support has sustained programs beyond funding received from the Robert Wood Johnson Foundation, other sources of funding may be available.

Other sources of funding may include:

- Earned income
- Congregation subsidies
- Fundraisers
- Church donations
- Contracts
- Special events
- In-kind contributions
- Income from sponsors
- Individual bequests

Contracts with public transit agencies may be a possibility if they are approached with a clear understanding of what a volunteer program can offer them. For example, a recent study on methods used by public transportation services to support seniors, found that volunteer driver programs are viewed as supplementing or supporting public transit services if they reduce senior dependence on costly paratransit services.

Practice Resource #5

Funding Options Ideas

#1 Examples of Business Donation Methods

One or several businesses may be willing to support your program by:

- Covering a portion or all of the cost of rides to the business establishments
- Making in-kind donations
- Sponsoring events

Now add your ideas for business donations.

#2 Volunteer Driver Appeal to Public Transit

In approaching a public transit agency to explore a mutually beneficial contractual relationship, you will need to know what you have to offer. Below are examples of what a volunteer driver program for senior transportation can do for public transit.

- Reduce paratransit service costs
- Operate more hours or even 24/7 service
- Offer more supportive assistance (e.g. stay at destination)
- Provide supportive assistance that is less expensive than paratransit
- Supply a cost effective solution for rural service

Now add your ideas.

#3 Calculating Volunteer Hours

*The calculation of the dollar value of 1,000 hours is
(1,000 x \$18.77=\$180,077)*

	X	\$18.77	=	
Number of volunteer hours donated to your program last year				Value of in kind contributions made by your volunteers

The dollar value of a volunteer hour varies from state to state. For a list of these values by state, visit the Independent Sector website at:

http://www.independentsector.org/programs/research/volunteer_time.html

Workbook Topic #6

Infrastructure Reduction Methods

Recommendation

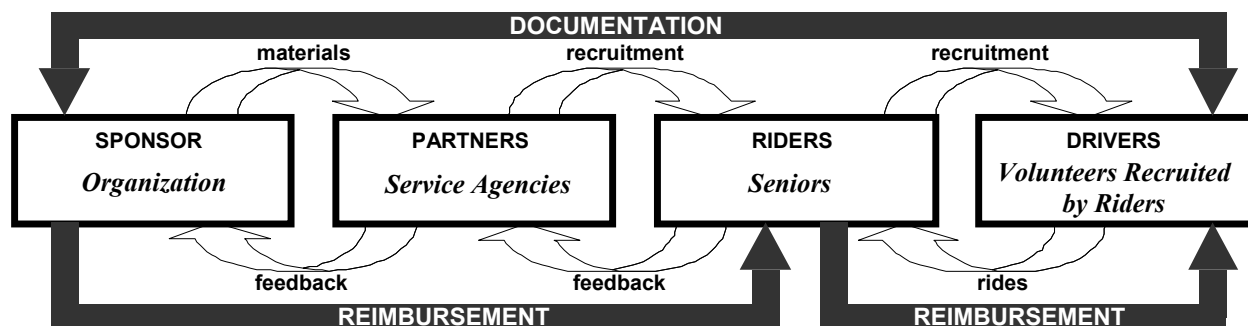
It is not always necessary to have ride scheduling as a staff driven activity. Faith in Action programs could benefit from exploring ways of limiting some or all of their scheduling activities. The “Volunteer Friends” model that has been adapted by transportation services enables riders and drivers (who consider themselves friends) to schedule rides on the basis of mutual agreement. Drivers still provide reports on destinations (and in some programs are reimbursed for mileage) but it is not necessary for program staff to use precious time and resources in scheduling their rides.

Recommendation

While it is important for programs to continually recruit drivers, the “Volunteer Friends” model, developed by the Beverly Foundation, eliminates a considerable administrative requirement by empowering riders to recruit their own drivers. The fact that the riders and drivers are “friends” makes it possible for them to schedule the rides as well.

The survey indicated that a large number of *Faith in Action* programs provide transportation with limited staff, limited infrastructure, and limited financial resources. Scheduling rides appeared to be one of the major contributors to time and effort requirements on the part of staff, volunteer drivers, and riders. At the same time, many programs that scheduled rides required considerable advance scheduling of more than two days (48%), or at least two days (26%). Some even said that they require two weeks advance scheduling.

The Volunteer Friends model is illustrated below.



The *Volunteer Friends* model and other models that minimize requirements for scheduling and minimize recruitment activities offer volunteer driver programs the opportunity to reduce infrastructure and at the same time, reduce cost requirements.

Practice Resource #6
Infrastructure Reduction Methods

The list below identifies ten methods of reducing infrastructure and related costs.

1. *Let some or all riders recruit their own drivers.*
2. *Let riders and drivers schedule themselves.*
3. *Let drivers link with rider schedules on the internet.*
4. *Locate rent free office space.*
5. *Involve "retired" volunteer drivers as volunteer staff.*
6. *Use volunteer driver vehicles and sell owned vehicles.*
7. *Link with services that can serve seniors who need lift equipped vans.*
8. *Eliminate driver reimbursement or limit per mile or total reimbursement.*
9. *Limit service area to immediate community.*
10. *Use "off the shelf" programs for information management.*

On the list below, identify five ways you could envision reducing your infrastructure and related costs.

1. _____
2. _____
3. _____
4. _____
5. _____

Workbook Topic #7

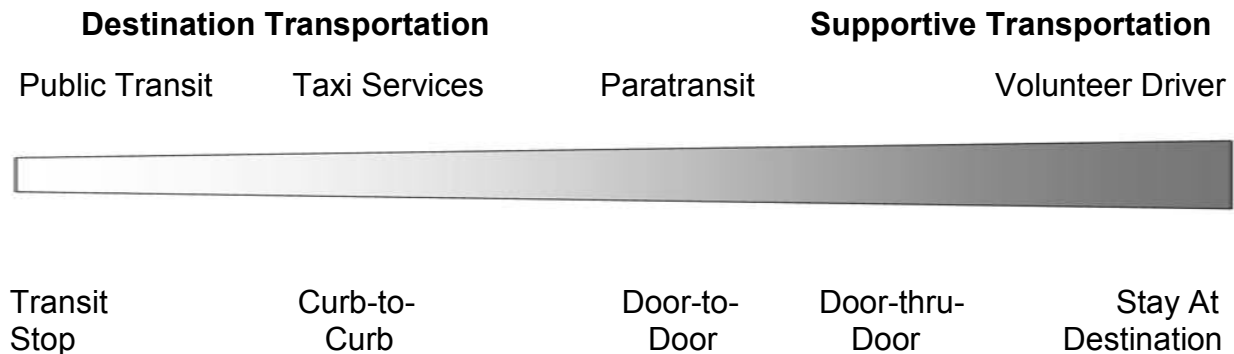
Transportation Assistance Methods

Recommendation

It is in the best interest of Faith in Action programs to recognize their limits in providing transportation to seniors and people with disabilities who have limitations that make providing transportation difficult. Such limitations create opportunities for Faith in Action programs to link with transportation providers (especially Dial-A-Ride and ADA Paratransit services) that have the necessary vehicles, equipment, and training to provide elevated levels of assistance to seniors and people with major disabilities.

Many (80%) respondents indicated that they served seniors and people with disabilities. The limitations of people with disabilities and seniors may be one reason why the programs provide such a high level of assistance with both door-through-door assistance (82%) and assistance at the destination (79%). At the same time, these involve volunteer drivers who use their own vehicles (96%), thus making it difficult to meet the needs of people with a high level of disability.

First, let's talk about what might be called supportive transportation. The chart below suggests the continuum of transportation services and type of support provided.



Most public, paratransit, and taxi services were not designed to provide supportive transportation, especially services that go through the door and allow drivers to stay at the destination. That tends to be in the domain of STPs (Supplemental Transportation Services for seniors), many of which are programs that involve volunteer drivers.

At the same time, it is important for volunteer driver program staff to have information about other services so they can refer riders who may be able to use public transportation or taxi services or refer riders who need lift equipped vehicles to a taxi service or paratransit service that has the necessary equipment.

Practice Resource #7

Service and Assistance Exercise

The purpose of the transportation assistance game is to introduce a number of transportation challenges faced by seniors, the types of assistance that are often available in communities, and methods that volunteer driver programs might consider for ensuring that seniors are able to get those services. Follow the three steps below to “play” the game.

- Step #1** Review the list of 10 challenges, the list of 10 types of assistance, and the list of 5 methods.
- Step #2** Put the number of the challenge that can be met by each type of assistance. Try to meet all the challenges if you can.
- Step #3** Put the number of the method your service uses for helping seniors access the assistance they need. Try to decide on a method for helping seniors access all the services if you can.

Challenges	Assistance	Methods
Crossing Jurisdictions (1)	__Ride Sharing__	(1) Provide Directly
Riding Public Transit (2)	__Travel Training__	(2) Would like to Provide
Paying for Transit (3)	__Concierge Service__	(3) Refer Rider
Help in Residence (4)	__Commuter Volunteers__	(4) Link with Others
Meeting with Doctor (5)	__Rider Empowerment__	(5) Can't Help
Stay Alone at Destination (6)	__Taxi Voucher Service__	
Driving Long Distances (7)	__Flexible Service Area__	
Arranging Own Transit (8)	__Door-through-Door__	
Awareness of Options (9)	__Help At Destination__	
Long Distance Transit (10)	__Medical Advocate at Doctor__	

If you do not know the definition of some of the assistance terms, please turn to Attachment 1.

Workbook Topic #8

Attention to Insurance

Recommendation

Any transportation program, whether it involves paid or volunteer drivers or vehicles that are owned or provided by volunteer drivers, must be aware of potential liability and secure insurance coverage whenever possible.

While respondents to the survey reported a positive collision experience resulting in legal liability (e.g. 2% in past year), attention to insurance is of critical importance to any transportation service, including volunteer driver programs. Below is a summary description of three important factors associated with insurance

(1) Liability: Liability is a legal obligation, something owed to another, or what some would call “a handicap”. It generally refers to the volunteer driver program sponsor’s potential responsibility for the actions (or inactions) of its volunteers, or potential for harm suffered by volunteers.

(2) Exposure: Transporting people in a vehicle creates a certain degree of exposure to potential liability, regardless of the type of vehicle, the type of driver, or the time or the location of the service. Such exposure includes the potential for liability related to property damage or bodily harm in the course of transporting an individual. Adding “supportive transportation” tends to extend the exposure and potential liability for property damage, physical injuries to the passenger (or driver), or even physical abuse to the passenger when providing assistance to or into the residence or destination. That some insurers do not understand the practice of providing supportive transportation (especially when it involves going through the door) can relegate it to a “don’t ask – don’t tell” relationship with the insurer.

(3) Insurance: According to the Community Transportation Association of America, insurance is the biggest and most expensive problem faced by volunteer driver programs. As a result, prospective and current program sponsors express concerns about obtainable and affordable insurance. Indeed, insurance can be difficult to obtain (especially when programs provide “supportive transportation”), and premiums for vehicle and volunteer driver coverage may increase every year. However, the fact that insurance is subject to state regulation and states vary widely in their legislation and attitude towards insurance means that volunteer driver programs can face varying difficulties in securing and paying for insurance.

Practice Resource #8 (Insurance Topics Coverage Review) provides a checklist of questions related to insurance and a summary of insurance coverage that should be considered (and purchased) by volunteer driver programs.

Practice Resource #8

Insurance Coverage Review

Insurance Questions Checklist

- 1. Is your volunteer driver program...**
 - a. a stand alone non-profit organization yes no
 - b. a program that is part of a menu of human services yes no
 - c. a program that is part of a menu of transportation services yes no

- 2. Does your volunteer driver program....**
 - a. own or lease vehicles yes no
 - b. use vehicles owned by volunteer drivers yes no
 - c. require maintenance and repair of owned & non owned vehicles yes no

- 3. Does your volunteer driver program....**
 - a. require volunteer drivers to maintain state required minimum ins. yes no
 - b. verify proof of insurance yes no
 - d. does it annually update insurance verification yes no

- 4. Does your volunteer driver program...**
 - a. provide curb-to-curb transportation only yes no
 - b. provide door-to-door assistance yes no
 - c. provide door-through-door assistance yes no
 - d. stay with passengers at the destination yes no

- 5. Does your volunteer driver program...**
 - a. charge fees yes no
 - b. provide a list of "suggested donations" yes no
 - c. give passengers the opportunity to make donations yes no

Types of Insurance Coverage

Your responses to the above should provide important information in determining requirements for insurance coverage for your volunteer driver program. The following types of insurance coverage (below) indicate the types of coverage that should be considered by *Faith in Action* volunteer driver programs when they include volunteer drivers who drive their own vehicles.

- 1. Organizational Insurance:** Commercial coverage for general liability, personal injury and property damage, and insurance for directors.
- 2. Personal Liability Insurance:** Coverage for personal injury or property for occurrences outside the automobile in excess of amount insurance that a volunteer driver has in place.
- 3. Excess Auto Liability Insurance:** An extra layer of protection for volunteers that protects for bodily injury or property damage that occurs while providing transportation.
- 4. Accident Insurance:** Provides excess medical and accidental dismemberment and death coverage in excess of coverage that volunteer drivers have in place.

Note

The insurance requirements will be much more complex for volunteer driver programs that are profit in nature, that are part of a menu of services, that own or lease vehicles, that include paid drivers, and/or that charge fees for providing service.

Workbook Topic #9

Volunteer Driver Recruitment

Recommendation

Reach out to seniors, especially seniors who are recently retired, the “young old”, for when they volunteer to drive, they generally: (1) own a car, (2) enjoy driving, (3) are more law-abiding than younger drivers, (4) have safer driving habits, and (5) are looking for something meaningful to do.

Volunteer driver recruitment was discussed in Workbook Topic #6. The importance of volunteer recruitment cannot be overstated because: (1) the vast majority (99%) of the respondents reported that they engage volunteers to drive; and (2) a very high percent (95%) indicated that they need more volunteer drivers. It would appear that the age 65+ population holds considerable promise as a primary target for volunteer driver recruitment, for almost half (49%) of the volunteer drivers participants were reported to be age 65 and older.

Volunteers are key to sustaining many programs across the country, and certainly the work of volunteer driver programs. Thus, success in volunteer driver recruitment is important with respect to ensuring that people get rides, avoiding driver burn out, and expanding services. Success in recruiting seniors as volunteer drivers offers the additional benefit of joining “the two sides of aging” in enabling the “young old” (those age 65-80) to support the “old old” (those in the 80+ age group). It is clear that volunteer driving is important to the riders, but it also has a positive impact on both the senior riders and the senior drivers. Recent research demonstrates that volunteerism not only increases quality of life but also adds years to life for older adults.

The first step is determining where to go to recruit drivers. According to volunteer driver programs, the best venues for volunteer recruitment fall into the following order.

Media/newspaper/newsletter/internet	Conversations
Churches/interfaith groups	Word-of-mouth referrals
Clubs (Rotary/Lions/Kiwanis/Civic Groups)	Volunteer Fair/Volunteer Match
Senior Centers/Senior Clubs	Television
Senior Housing and Communities	Businesses with volunteer groups

The Beverly Foundation’s *Idea Book for Volunteer Driver Recruitment* offers a great number of recruitment strategies collected from volunteer driver programs. For a printable copy of the *Idea Book* visit the Senior Transportation Library on the Beverly Foundation website:

www.beverlyfoundation.org

Practice Resource #9

Volunteer Driver Recruitment Ideas

Below is a list of potential volunteer recruitment venues. First, check the boxes next to the venues that you have approached in your recruitment efforts.
Next, circle the venues that you could approach in the future.

Senior Groups

- Senior Centers
- AARP Chapters
- Corporate Retirement Clubs
- Adult Education

Community Events

- Health Fairs
- County Fairs
- Job Fairs
- Fundraisers

Service/Fraternal Groups

- Rotary
- Garden Clubs
- Men's/women's clubs

Local Businesses

- Pharmacies
- Supermarkets
- Banks
- Cafes
- Shopping Centers
- Laundromats
- Fast food Outlets

Health Facilities

- Hospitals
- Clinics
- Doctors' Offices

Faith Groups

- Churches
- Faith Communities
- Ministerial Alliances
- Local religious groups

Residential Centers

- Retirement Communities
- Mobile Home Parks
- Senior complexes

Community Venues

- PTA Meetings
- Recreation Departments
- Town Hall Meetings
- Local Social Services
- Chamber of Commerce
- Post Offices
- Libraries

List your Great Ideas for Volunteer Recruitment Venues below.

Workbook Topic #10

Senior Friendliness

Volunteer Driver programs can be critical to older adults who have limited their driving or have stopped driving altogether. However, it is the degree of “senior friendliness” of the volunteer driver program that will determine whether transportation enables seniors to experience a sense of independence, to get where they need to go, and/or to enjoy an acceptable quality of life.

Research conducted by the Beverly Foundation and policy and program initiatives of government and non-profit agencies at the national, state, and local level have defined the 5 A’s. Today they have been adopted as criteria for standards in senior transportation. The 5 A’s include five key factors below:

The 5 A’s of Senior Friendly Transportation

- Availability:** Transportation services that are available to seniors... Not only are services offered, but they meet expectations of time availability (evenings/weekends) and quantity (rides not limited).
- Acceptability:** Transportation services that are acceptable to seniors... Service quality is deemed satisfactory in terms of advance scheduling, vehicle cleanliness, driver sensitivity to seniors, and wait time.
- Accessibility:** Transportation services that seniors can access... Services are easy to use because they offer supportive assistance (e.g. driver comes to door) and they provide rides where seniors need to go.
- Adaptability:** Transportation services that can be adapted to senior needs... Services accommodate seniors’ needs for scheduling multiple stops, and providing additional support (assistance with walkers and wheelchairs, and help at destination).
- Affordability:** Transportation services that are affordable for seniors and the program... The potential for low-cost operations can enable programs to offer services free of charge, and to be financially sustainable.

Adopting senior friendliness criteria can provide a means for thinking about and assessing just how senior friendly a transportation service is, or could be. Such criteria also can serve to establish a baseline for measuring the effectiveness of coordination efforts and can provide benchmarks that help move coordination initiatives forward.

Practice Resource #10 presents “The Senior Friendliness Calculator”
A method for calculating senior friendliness

Practice #10

Calculate The Senior Friendliness

Now you might want to review your program's senior friendliness. To do so, check each of the factors below that are represented within your program. Each check equals one point. When you have completed your review, add up your score and look at the scoring key at the bottom of the page to know where you are on "the road to senior friendliness."

Availability: The Volunteer Driver Program....

- _____ provides transportation to seniors
- _____ is able to recruit and retain sufficient number of drivers
- _____ can provide transportation anytime (days, evenings, weekends)
- _____ does not limit number of rides
- _____ maintains organizational relationships with human & transit services

Acceptability: The Volunteer Driver Program....

- _____ uses automobiles to provide majority of transportation
- _____ does not require advance scheduling
- _____ involves riders to determine appropriate wait time
- _____ conveys guidelines to ensure vehicles are clean and well maintained
- _____ provides driver "sensitivity to seniors" training

Accessibility: The Volunteer Driver Program....

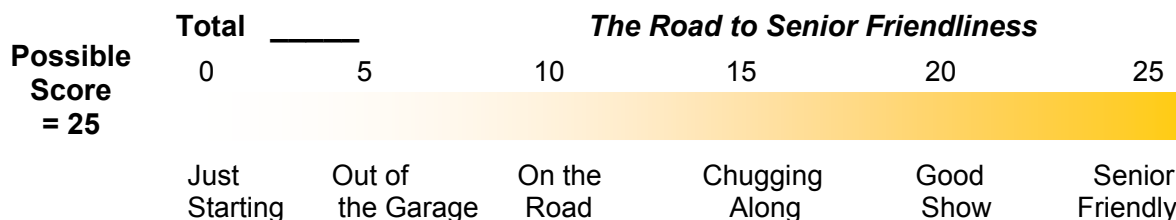
- _____ can accommodate needs of majority of elders in the community
- _____ can take riders to destinations beyond city & county boundaries
- _____ provides "door-to-door" transportation
- _____ provides training to riders on how to access services
- _____ can provide services to essential and non essential activities

Adaptability: The Volunteer Driver Program....

- _____ can accommodate riders who need or want to make multiple stops
- _____ makes an effort to link riders with other services when appropriate
- _____ can access vehicles to accommodate wheelchairs and walkers
- _____ provides "door-thru-door" transportation when needed
- _____ will provide transportation escorts when needed

Affordability: The Volunteer Driver Program....

- _____ provides insurance coverage for volunteer drivers
- _____ does not charge seniors for transportation services
- _____ accepts passenger donations for transportation services
- _____ covers the driver's deductible in the event of a crash
- _____ is willing to reimburse drivers for mileage or costs



And we included a final recommendation...

Keep Up The Good Work!

Attachment 1

Definitions and Useful Links

Definitions: Public Transportation

Transit System is an organization (public or private) providing local or regional multi-occupancy-vehicle passenger service. Organizations that provide service under contract to another agency are generally not counted as separate systems.

Public Transportation is defined by the American Public Transportation Association of America as transportation by a conveyance that provides regular and continuing general or special transportation to the public, but not including school buses, charter or sightseeing service.

ADA Paratransit “complementary paratransit” services to people with disabilities who cannot use the fixed-route bus or rail service because of a disability that is required of public transit agencies by the Americans with Disabilities Act. The ADA regulations specifically define a population of customers who are entitled to this service as a civil right. The regulations also define minimum service characteristics that must be met for this service to be considered equivalent to the fixed-route service it is intended to complement.

Paratransit (also called **Demand Response** or **Dial-A-Ride**) is comprised of passenger cars, vans or small buses operating in response to calls from passengers to the transit operator, who then dispatches a vehicle to pick up the passengers and transport them to their destinations. A paratransit operation is characterized by the following: (a) The vehicles do not operate over a fixed route or generally do not operate on a fixed schedule, and (b) typically, the vehicle may be dispatched to pick up several passengers at different pick-up points before taking them to their respective destinations.

Transportation Needs and Gaps generally refer to transit system capital requirements. They indicate a gap between the current/projected and the desired performance of the system. It also may refer to various market segments’ transit-related needs.

Trips (sometimes referred to as rides) describes the one direction (beginning to end) operation of a transit vehicle or the one-way movement of a person or vehicle between two points for a specific purpose. It can also refer to the measurement used to count the number of individual passenger or vehicle movements. **Trip Chaining** is the practice of making incidental stops on the way to or from a major destination (such as home or work).

Farebox is the value of cash, tickets, tokens and pass receipts given by passengers as payment for rides. To qualify for funding under Public Utilities Code, transit agencies must earn a certain percentage of their total revenues from fares. The required ration of farebox revenue to total revenue varies depending on the service areas.

Fixed Routes Service provided on a repetitive, fixed-schedule basis along a specific route with vehicles stopping to pick up and deliver passengers to specific locations; each fixed-route trip serves the same origins and destinations, unlike **demand responsive** and taxicabs.

Flex Routes Provides route deviation within specified parameters (distance, time) based upon requests from potential passengers.

Circulator Routes When limited to a small geographic area or to short-distance trips, local service is often called circulator, feeder, neighborhood, trolley, or shuttle service. Such routes, which often have a lower fare than regular local service, may operate in a loop and connect, often at a transfer center or rail station, to major routes for travel to more far-flung destinations. Examples are office park circulators, historic district routes, transit mall shuttles, rail feeder routes, and university campus loops.

Useful Public Transit Links

American Public Transit Association (APTA) www.apta.com

Easter Seals www.easterseals.com

Federal Highway Administration (FHWA) www.fhwa.dot.gov

National Transit Database of the Federal Transit Administration
www.ntdprogram.gov/ntdprogram

Definitions: Human Services

Transportation Programs that provide door-to-door transportation for people who may be elderly or disabled, who do not have private transportation and who are unable to utilize public transportation to meet their needs.

Supplemental Transportation is defined as transportation service provided by community-based program or service that supplements or complements public or ADA paratransit services. STPs stands for Supplement Transportation Programs for seniors.

Transportation Needs refer to seniors' mobility requirements for sustaining quantity and quality of life, and include transportation (and all necessary assistance) to both life-sustaining destinations (e.g. health care and nutrition centers) and life-enriching destinations (e.g. friends, entertainment, church).

AAA Under the Older Americans Act, the Administration on Aging distributes funds for various aging programs through state agencies on aging which in turn fund local area agencies on aging. Area Agencies on Aging address the concerns of older Americans at the local level. They play an important role in identifying community and social service needs and assuring that social and nutritional supports are made available to older people in communities where they live. In most cases, Area Agencies on Aging do not provide direct services. Instead, they subcontract with other organizations to facilitate the provision of a full range of services for older people.

Senior Among human service agencies, the conceptualization of what designates someone as an older adult varies greatly. Some define “senior” as referring to those as young as 55, while others see seniors as falling into the 65+ or even 75+ age groups.

“Old Old” Bernice L. Neugarten created the concept of ‘old-old’ to make the distinction between two stages in later adult development. In the first stage, older adults are generally in good health and active, and are referred as “young-old”. In the second stage, they are more likely to be living dependently, and are referred to as “old-old”.

Activities of Daily Living (ADLs) Activities usually performed for oneself in the course of a normal day including bathing, dressing, grooming, eating, walking, using the telephone, taking medications, and other personal care activities.

Instrumental Activities of Daily Living (IADLs) Household/independent living tasks which include using the telephone, taking medications, money management, housework, meal preparation, laundry, and grocery shopping.

Useful Human Service Links

U.S. Administration on Aging (AoA) www.aoa.gov

U.S. Department of Health and Human Services www.hhs.gov

National Association of State Units on Aging www.nasua.org

National Association of Area Agencies on Aging www.n4a.org

Definitions for the Service and Assistance Exercise

Ride Sharing Computerized service that matches riders with drivers via a website.

Travel Training Trainer familiarizes rider with the transit system and/or gives instruction on how to use the services.

Concierge Service Concierge rides the bus/van to assist the riders with their shopping bags and provides assistance if needed.

Commuter Volunteers Rider is linked with commuter with similar destination needs.

Rider Empowerment Rider is encouraged to select own drivers and schedule rides directly with drivers.

Taxi Vouchers Scrip or vouchers are redeemable for free or reduced-cost taxi rides.

Flexible Service Area Transportation services can cross jurisdictional boundaries.

Door-through-Door Driver or escort enters residence and/or destination to assist rider in getting to and from the vehicle, and at destination.

Help at Destination Driver or escort stays with rider at destination.

Medical Advocate at Doctor Advocate accompanies rider to doctor appointments, assists with communication with physician, takes notes, and/or helps fill prescriptions.

