

*MENTORING GUIDE  
FOR VOLUNTEER DRIVER PROGRAMS*

*A WORKBOOK  
FOR  
MENTORS AND MENTEES*

*THE MATCHING/MENTOR PROGRAM  
IS A PROJECT OF THE BEVERLY FOUNDATION  
2011*

## *THE MATCHING/MENTOR PROGRAM*

The Matching/Mentor Program was developed by the Beverly Foundation to build capacity in senior transportation service delivery by organizing and providing financial support for mentoring programs that tap into the wisdom and experience of leading professionals who manage transportation services that involve volunteer drivers.

*The Challenge* The initiative was undertaken in light of the pending retirement of many professionals working in the field of senior transportation after years of providing transportation services to older adults. Many of those who manage volunteer driver programs are acknowledged as some of the best transportation managers in the country, and their prospective retirement will create an enormous “brain drain” in senior transportation service delivery. The challenge was to harness the experience and expertise of these managers, and provide the financial resources and guidance that would enable them to share their knowledge with others.

*The Approach* The Matching/Mentor program targeted experienced managers of transportation services that provide transportation to older adults. The Beverly Foundation provided financial support and identified mentor/managers. Each mentor recruited a current staff person, a professional manager, or local student who they agreed to mentor for a defined period of 3, 6 or 12 months. The mentorships were expected to: (1) help facilitate succession planning, or (2) bring professionals into a new field, or (3) introduce entry level staff to an increased level of professional involvement. Whatever the outcome, the purpose was to build capacity in the field of senior transportation through knowledge transfer from seasoned transportation professionals to the next generation of transportation managers.

*The Outcome* The knowledge transfer and capacity building that resulted from the Matching/Mentor program not only contributed to the professionalization of the field of senior transportation service management, but ensured that the wisdom and experience of long time managers were transferred to the next generation who will assume responsibility for carrying the transportation agenda forward in the coming years. It also resulted in the development of this workbook.

*THE WORKBOOK  
AND  
HOW TO USE IT*

The purpose of the Matching/Mentor Workbook is to...

*...help facilitate the transfer of wisdom and experience  
gained from a career  
dedicated to  
providing transportation to older adults.*

The workbook addresses key topics critical to the operation of a transportation service or program that provides transportation to older adults and involves volunteer drivers. It has special relevance for transportation managers and prospective managers of volunteer driver programs. While each topic is important, the time and energy spent on any one topic are up to the mentor and mentee.

The contents of the workbook are organized into the following sections:

- Chapter 1: The Manager/Mentor and the Mentee
- Chapter 2: Key Issues in Community and Senior Transportation
- Chapter 3: History and Governance of the Transportation Service
- Chapter 4: Senior Transportation Services
- Chapter 5: Resource Management and Development Management

The workbook was prepared for both mentors and mentees, thus creating an opportunity for both to discuss and document topic-related ideas and activities that occur in the course of a mentoring experience.

**For the Mentor** In planning for your mentorship, it might be helpful to imagine yourself as a manager who wants desperately to pass the wisdom and experience you have gained through the years to another (or perhaps the next) generation of transportation managers. Sharing your experience as a transportation manager is the central purpose, however, a key piece of the agenda is conveying how your work and your transportation service have enabled seniors to get where they need to go.

**For the Mentee** In planning for your menteeship, it might be helpful to imagine yourself as a student who wants to learn from the knowledge and practical experience of a transportation manager who has spent many years “in the trenches” organizing, managing, and delivering transportation services to seniors (and perhaps others) in the community.

The questions on the following page should be helpful in getting you started.

## *Ten Questions That Set The Stage*

The ten questions below will be addressed in a variety of ways in the course of this workbook. By taking a quick look at them, you will get a glimpse at the intended content of the mentoring experience.

- 1. What is public transportation, and how does it differ from community transportation, human service transportation, and senior transportation?*
- 2. What is senior transportation and why is it important to older adults, their family members, and the community?*
- 3. How is the management of a traditional transportation service (e.g. a public transportation service that provides fixed route transportation services) similar to and/or different from a senior transportation service?*
- 4. How is the management of a traditional senior transportation program (e.g. a program that includes paid drivers and program owned vehicles) similar to and/or different from a volunteer driver program?*
- 5. Do you have policies and procedures in place for paid staff and volunteers, and in what way do they help the management of the service?*
- 6. What is included in your direct and indirect operational activities and how do you manage those activities?*
- 7. What processes are in place for managing the financial and human resources of your senior transportation and/or volunteer driver program?*
- 8. If seniors are the primary passengers of your program, have you developed successful messages to secure and/or supplement funds for their travel?*
- 9. What are some of the key challenges your service faces in providing transportation to senior passengers, and what have been some of your most successful solutions, and perhaps some of your most spectacular failures?*
- 10. What are the “keys to success” for the management of a transportation service that provides rides to older adults?*

These and many additional questions were addressed in the course of the mentoring experience, so let's move on to the workbook's table of contents.

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# CHAPTER 1

## THE MANAGER/MENTOR AND THE MENTEE

### 1A. TOPICS FOR DISCUSSION

*The following topics and discussion questions can be used by the mentor and mentee to get to know each other with respect to their educational background and personal life, their views on transportation and older adults, and their work experience.*

#### **(1) Educational Background**

- a. Where did you go to school?
- b. What were your favorite subjects in school?
- c. How did (or didn't) your formal education prepare you for where you are today... in life and at work?

#### **(2) Views on Transportation**

- a. What is the purpose of transportation?
- b. How do you believe transportation fits into the American agenda?
- c. What is the automobile's role in the transportation agenda today?
- d. What do you think is the automobile's role in providing transportation to older adults today and tomorrow?
- e. How do you think we can make transportation "greener"?

#### **(3) Views on Older Adults**

- a. Who, in your view, is an older adult?
- b. How do older adults view their roles as drivers?
- c. Why do older adults stop driving?
- d. Give some examples of older adult drivers you know?
- e. Why do older adults need transportation options?
- f. Are older adults easy or difficult to serve?
- g. What are some examples of older adults who use transportation services?

#### **(4) Personal Life**

- a. Do you have a family?
- b. Does your family live near-by or far away?
- c. How does your family view your interest in senior transportation?
- d. What are some of the things you do outside of work?
- e. Where do your current job responsibilities fit into your life?

#### **(5) Work Experience**

- a. What has been your career path to your current position?
- b. How many years have you been in your current position?

##### The Mentor

- a. What are some of the key ingredients that have made you a good senior transportation manager?

- b. What has had the greatest impact on you with respect to learning how to manage a senior transportation service?
- c. What was your vision when you became a senior transportation manager? Is it the same today as it was then?
- d. What (if any) have been your limitations as a manager?
- e. If you had it to do over again (becoming a senior transportation manager) what would you do differently?
- f. What do you believe are the key issues a manager needs to know in order to be a good senior transportation manager?

The Mentee

- a. What has had the greatest impact on you with respect to wanting to or learning how to manage an organization... or manage your life?
- b. What (if any) have been your limitations as a manager?
- c. What are some of the personal, educational and/or professional experiences that have led you to the field of senior transportation?
- d. What are some of your work experiences and life experiences that you believe might be of value in managing a senior transportation service?

*1B. SUGGESTED MENTORING ACTIVITIES*

*What follows are the types of activities which you may want to consider for your own mentoring program.*

- Develop goals of the mentoring experience.
- Discuss the topics outlined above including the work experience, and background and personal life of the mentor and mentee, purpose of transportation and our traditional dependence on the automobile, the unique needs of older adults who drive and use community-based transportation options, the organization, the mentor, and the mentee.
- Talk about the dilemma facing the older adult driver and 'giving up the keys'.
- Discuss the pluses and minuses of management.
- Review the possibilities the Matching/Mentor program will offer the transportation service to complete.
- Spend time with staff members to gain an inside view of program operations.
- Join in a ride-along with drivers.
- Have a long lunch together.
- Shadow the mentor for a week.

*1C. SAMPLE OF MENTOR/MENTEE EXPERIENCES*

*The following list of activities were undertaken in the course of the Matching/Mentor pilot programs.*

- One mentee shadowed the mentor for a week. Another mentee began attending most meetings the mentor was involved in.



- In addition to a ride-along, one mentee was assigned a self-study and completed a report on the special needs of the riders.
- In developing goals for the program, one mentee was asked to complete a paper on the role and importance of setting work goals.

*1D. RESOURCE RECOMMENDATIONS*

(see Senior Transportation Resources and Exercises, pp. 31-44)

- Mentor Resume
- Mentee Resume
- Bailey, L. (2004). Aging Americans: Stranded Without Options. Surface Transportation Policy Project: Washington, DC. (see resources section, p. 33)
- Foley, D. J., Heimovitz, H. K., Guralnik, J. M., & Brock, D. B. (2002). Driving life expectancy of persons aged 70 years and older in the United States. *American Journal of Public Health, 92*(8):1284-9. (see resources section, p. 33)

*CHAPTER 1 HIGHLIGHTS*

- Discussing the mentor and mentee's educational and personal experiences can open the dialogue to help guide both the mentor and the mentee to an understanding of the skill sets necessary to become a successful senior transportation manager.
- Discussing the pros and cons of older adult drivers and older adults who need transportation helps open the conversation related to the challenges faced by both older adults and senior transportation services.
- Reviewing the professional trajectory of the mentee can provide important insights for the mentor, and professional trajectory of the mentor provides insights for the mentee.
- Discussing the relevance of transportation in general and how it impacts older adults specifically provides the groundwork for understanding how transportation services are organized, why they can and cannot provide transportation to older adults, and the reason for the development of volunteer driver transportation programs.
- Establishing goals for the Matching/Mentor program with participation of both the mentor and mentee can help ensure that the Matching/Mentor program will meet the needs of both parties.



## CHAPTER 2

### KEY ISSUES IN COMMUNITY AND SENIOR TRANSPORTATION

#### 2A. TOPICS FOR DISCUSSION

*The following topics and discussion questions offer an opportunity for both the mentor and the mentee to explore issues that are central to transportation for the general public, for communities, and for older adults. Many questions can be addressed from the perspective of the general public as well as the perspective of older adults.*

#### **(1) The Basics of Community Transportation**

- a. What is the purpose of a community transportation service?
- b. Who can be served by community transportation services?
- c. How are community transportation services organized?  
(fixed route, circulator route, ADA paratransit (demand response), general paratransit, taxi services, human service transit, volunteer driver programs, and others)
- d. What does a service look like when it is organized hierarchically?
- e. What does it look like when it is organized horizontally?
- f. Who are the primary providers of community transportation services?
- g. How are they organized and where do they go?
- h. What are some of the general methods of payment?
- i. What types of vehicles can be used?
- j. What types of drivers can be involved?
- k. Where can transportation services go?
- l. What types of assistance can be provided to passengers?
- m. In addition to delivering transportation services, what other types of activities do community transportation services undertake?
- n. What resources are available to support them?  
(locally, regionally, state-wide, nationally)
- o. What are the key issues a transportation manager needs to know about community transportation, and why is it important to be informed about it?

#### **(2) Local Transportation in Our Community**

- a. What local transportation services are available in our community?
- b. Who are the primary providers of those services?
- c. How are the services organized?
- d. Where do our local transportation services go?
- e. What resources are available to support them?
- e. How does or doesn't our service meet the needs of seniors?

#### **(3) Senior Transportation Issues and Options**

- a. What are the key transportation needs of seniors?
- b. Who are the seniors who generally use community transportation services?

- c. Are their transportation needs different than those of other people?
- d. What types of transportation assistance do some seniors need?
- e. What types of transportation services can be available to meet their needs?
- f. What challenges and opportunities do programs face in providing transportation to older adults?
- g. What are the advantages and disadvantages of volunteer drivers and the volunteer driver program option?

**(4) Transportation Options for Seniors in Our Community**

- a. Why do seniors in our community need transportation?
- b. What types of transportation do we make available to them?
- c. What types of transportation assistance do we provide to them?
- d. Are we able to meet their needs?
  - If so what is it we do to meet those needs?
  - If not, what is it we don't do... and why don't we do it?
- e. When we can't meet their needs, what do we do?
- f. Do we know if seniors who use our service are satisfied?
  - If so how do we know?
  - If not, why don't we know?
- g. What challenges and opportunities do we face in providing transportation to older adults?
- h. Which transportation services in our community are "senior friendly", which ones are not senior friendly, and if they aren't why aren't they?

*2B. SUGGESTED MENTORING ACTIVITIES*

*What follows are the types of activities which you may want to consider for your own mentoring program.*

- Review reports on different forms of transportation. For example, one mentee researched all the available transportation services in their metropolitan area.
- Meet with the managers of other transportation services. One mentee visited the nine other executive directors of FIAC groups to interview them and learn about their operations and experiences. The mentee learned how each operation markets itself, raises funding streams and rewards volunteerism. The mentee observed how the different locations affect each organization (rural, suburban, urban, and lower income vs. higher income). The mentee interviewed executive directors about their risk management practices, their use of organizational policies and procedures and their personal philosophies of volunteer management.
- Meet with people from human service agencies about transportation services for seniors. In one case, the mentee attended local health reform seminars to understand how seniors would be affected by the new US health polices.
- Use a public transportation service.

## 2C. SAMPLE OF MENTEE/MENTOR EXPERIENCES

*The following list of activities were undertaken in the course of the Matching/Mentor pilot programs.*

- Discussions with several drivers who provide rides to seniors and took a ride-along with volunteer drivers when they drive clients to appointments.
- Completion of the “Senior Friendliness Calculator” to calculate the senior friendliness of local public transportation service (see exercises, pp. 36-37).
- Completion of the Prepare A Transportation Options Booklet to identify services that provided transportation and the “Build your Volunteer Driver Program” (see exercises section, pp. 40-44).
- Visits with local transportation services and meet with service managers to learn about their operations and experiences with respect to marketing, ride scheduling, risk management, customer service, and general service delivery practices.
- Visits to urban, suburban, and rural transportation services and meet with staff to observe similarities and differences in operations.
- Visits to senior transportation service websites.
- Identification of transportation services in the local area or community.
- Review of the Beverly Foundation informational and technical materials on the Foundation’s website.
- Identification of senior transportation providers/programs/models across the country (including the TRIP model).
- Study of federal FTA supported transportation services.
- Study of federal AoA supported transportation services.

## 2D. RESOURCE RECOMMENDATIONS

(see Senior Transportation Resources and Exercises, pp. 31-44)

- Beverly Foundation Report: *Supplemental Transportation Services for Seniors (STPs) in America*. (2004).
- Beverly Foundation White Paper: *Transportation Innovations for Seniors, A Report from Rural America*. (2005).
- *Beverly Fact Sheet #3 STPs in America*.
- Burkhardt, J. E. (2007). *High-Quality Transportation Services for Seniors*. Rockville, Maryland: WESTAT (see resources section, p. 33).
- Hardin, J. (2003). *Senior transportation: Toolkit and best practices*. Washington, DC: CTAA. (116 p) (see resources section, p. 33).
- Rosenbloom, S. (2009). Meeting transportation needs in an aging-friendly community. *Generations*, 33(2): 33-43. (see resources section, p. 33).
- United States Government Accountability Office, (2004, August). *Transportation—Disadvantaged Seniors: Efforts to Enhance Senior Mobility Could Benefit from Additional Guidance and Information*, Washington, DC.

## CHAPTER 2 HIGHLIGHTS

- Identifying the community transportation issues and network provides the background and rationale for specialized transportation service needs.
- Knowledge about the available transportation services in a community is essential for service delivery within one own system as well as referrals to other services. At the same time an understanding of these transportation services with respect to their senior friendliness also aids in the operation of a transportation service and in ensuring that a senior transportation service supplements rather than competes with other services in the community.
- Older adults who do not drive and must access a community-based transportation service often have assistance needs. Why? Because the same physical and mental limitations that have caused them to limit their driving or to stop driving make it difficult to access many services. Understanding the special transportation needs of seniors is the first step in providing a transportation service that meets all those challenges.
- While many senior passengers' needs can be identified, many have physical and/or mental limitations that impact on their mobility and independence. For example, they may not be able to walk to the bus stop or the curb, they may not be able to get in or out of a vehicle. They may not be able to ride on a vehicle alone. These are challenges many seniors face in trying to use transportation options, but they are also challenges transportation services face in providing transportation services to them.
- Participation in a 'ride-along' with a volunteer driver offers anyone (including the mentee) a first hand understanding of why seniors need transportation, the importance of assisting and supporting older adult passengers, and an *inside view* of volunteer driver programs and their volunteer drivers.



## CHAPTER 3

### HISTORY AND GOVERNANCE OF THE TRANSPORTATION SERVICE

#### 3A. TOPICS FOR DISCUSSION

*The following topics and discussion questions offer an opportunity to review the history and philosophy of the organization, as well as its methods of governance.*

*These are central issues necessary for understanding why the transportation services were developed, who participated in its development, how it was and is funded, and how it has been sustained.*

#### **(1) History**

- a. When was the organization created? Who are the key players?
- b. Why was the organization created, and who was responsible for its origin?
- c. Did the organization provide transportation when it began?
- d. Did it start out as a senior transportation service and if so why and how?
- e. Was and/or is the senior transportation service part of a larger transportation or human service organization or is it a stand-alone service?
- f. What were its original purposes and have they evolved over time?
- g. What are some of the milestones in the development and evolution of the service (a milestone chart by date might be helpful)?

#### **(2) Philosophy**

- a. What was the original philosophy about providing transportation to seniors, and what is it today? Has it changed over time, and if so why?
- b. From where did the philosophy originate (a person, group or manager, the community, another organization, or this organization)?
- c. How does the philosophy of today differ with the past, and how does it impact on the ability to provide transportation to older adults?
- d. Is the philosophy shared, by the board, by the staff, by the community?
- e. What methods have you used to get staff “buy in” to the philosophy?

#### **(3) Governance\***

- a. What is the composition of the board?
- b. What are the board responsibilities?
- c. How are board members selected and how long do they serve?
- d. What is the purpose of the organization’s Articles of Incorporation and Bylaws?
- e. What are the primary transportation service policies, have the policies been altered over time, and if so, why and how?
- f. How does the board and how do the policies it sets, affect your job as a manager? What is the attitude of the board toward senior passengers?
- g. Who really has the power in the organization?

*\*If your service is sponsored by a government agency, your governance may be constituted as a council or form other than a board.*



#### **(4) Culture**

- a. What are the beliefs and values that are the basis of your organization's activities?
- b. How are important organizational decisions made?
- c. What standards of behavior are expected?
- d. Is individualism or group cohesiveness more important?
- e. What are the firmly established priorities of your organization?
- f. Is the organization sensitive to the needs of seniors?
- g. How are clients, customers and staff treated by management?

#### *3B. SUGGESTED MENTORING ACTIVITIES*

*What follows are the types of activities which you may want to consider for your own mentoring program.*

- Include the mentee in e-mail correspondence and cc the mentee in manager and program correspondence.
- Discuss the program background and history (how the program developed; what type of transportation services are offered; operational aspects of running a transportation service; how outreach for potential clients is accomplished; where and how drivers (volunteers) are recruited, and examples of some "good times" and "bad times" the organization has faced.
- Discuss the key issues a manager needs to know and do regarding the history or the service, its philosophy, and its governance.
- Discuss the management responsibilities, and program and implementation activities of the mentor.
- Discuss the benefits of creating a culture which embraces human resources and human resources policies.
- Discuss what employees think about the philosophy and culture of the organization and the service they are providing.
- Identify and discuss turning points in the organization while you have been a manager.
- Read and discuss the service brochure, newsletter, and other materials about the organization and its service.
- Allow the mentee to participate in the preparation (and presentation of) updates to the organization's board of directors and in the update or development of the strategic plan.
- Read and discuss press articles about the organization and its service.
- Have lunch with staff and discuss the history of the service and employee experiences, and opinions about the service and its passengers.
- Arrange interviews with members of the board and ask them to describe the organization, its culture, and its contribution.
- Attend board meetings to gain insight into organizational governance.

### 3C. *SAMPLE OF MENTEE/MENTOR EXPERIENCES*

*The following list of activities were undertaken in the course of the Matching/Mentor pilot programs.*

- A mentee assisted with the update and modifications of existing materials.
- Two mentees attended board meetings (to see governance in action), and one attended the board's annual retreat where members discussed financial goals, committee goals and service operations for the year.
- A mentee designs a client satisfaction survey using the Beverly Foundation's 5 A's of Senior Friendly Transportation as a guide.
- One mentee worked with publishing company on the *Ride Guide* cover design and handled all the transactions with the company to assure the final product met specifications.

### 3D. *RESOURCE RECOMMENDATIONS*

(see Senior Transportation Resources and Exercises, pp. 31-44)

- Brochures, the most recent strategic plan, performance reports, policy and procedure manuals including general information about the organization and its services (of which transportation may be part of a menu of services).
- The mentor's succession plan.
- Seniors Resource Center. (2007). Guide to a Successful Volunteer Driver Program. 1-16 plus helpful attachments. (see resources section, p. 34)
- The Beverly Foundation's 5 A's of Senior Friendly Transportation and Senior Friendliness Calculator (2008) (see exercises section, pp. 36-37)

### *Chapter 3 Highlights*

- Introducing the history and philosophy of the mentor's transportation organization can provide important information to the mentee (and sometimes to the mentor) about how the organization was formed, how it has evolved, and why it does what it does.
- A manager must address organizational governance issues in transportation services on an on-going basis. Working with board members, being aware of (and training and informing staff) about policies can be a critical part of the manager's responsibility for the governing board and the organization's policies and procedures can influence transportation service delivery in many ways.
- Beliefs and values of a transportation service are filtered down into a transportation service's culture, activities, standards of behavior; and treatment of senior passengers, volunteer and paid drivers, and staff.



## *CHAPTER 4*

### *SENIOR TRANSPORTATION SERVICES*

#### *4A. TOPICS FOR DISCUSSION*

*The following topics and discussion questions offer an opportunity to review the overall program of the organization which is important if it is located within a menu of services; to review the key elements of your senior transportation and/or volunteer driver program; and to review congruent and management activities that expand and support the services you provide.*

#### **(1) The Overall Program**

- a. What services (other than transportation) does your organization offer?
  - volunteer activities
  - nutrition program
  - recreation activities
  - adult day care
  - social services
  - health care service
  - other
- b. What transportation services do you offer?
  - fixed route and/or circulator route
  - ADA paratransit and/or general paratransit (demand response)
  - shuttle service
  - ride sharing
  - special trips
  - senior transportation
  - volunteer driver program
  - other

#### **(2) The Senior Transportation Services/Volunteer Driver Program**

- a. What are the key elements of your senior transportation program?
  - method of service delivery (paid driver only, volunteer driver only, both)
  - type of drivers (paid/volunteer)
  - type of vehicles (program owned/leased, volunteer driver owned)
  - type of service area (urban, suburban, rural, flexible boundaries)
  - method of trip scheduling
  - type of travel options (single destination or trip chaining)
  - type of destinations (life sustaining, life maintaining, life enriching)
  - method of data management
- b. What are the types of destinations where you take senior passengers?
  - life sustaining destinations
  - life maintaining destinations
  - life enriching destinations
  - special destinations

- c. What types of assistance do you provide?
  - curb-to-curb
  - door-to-door
  - door-through-door
  - stay-at-destination service
  - escort
- d. What types of passengers do you serve?
  - general public
  - children
  - people going to work
  - people who are disabled
  - seniors (age \_\_\_ and over)
- e. How do your services to seniors affect other passengers?

### **(3) Congruent and Management Activities**

- a. What types of congruent activities support your program?
  - volunteer recruitment
  - driver recruitment and training
  - vehicle (or fleet) management (and maintenance)
  - information and referral
  - special trips
  - travel training
  - mobility management
  - transportation service center management
- b. What management activities support your program?
  - staff training
  - service planning
  - coordination/collaboration
  - contract development
  - contract compliance
  - service partnerships
  - fundraising
  - marketing and public relations
- c. Factors that impact on senior passengers
  - hierarchical structure (top-down decision-making authority)
  - horizontal structure (decision-making does not come from the top down)
  - methods of customer support
  - measures of customer satisfaction
  - general communication and coordination

#### *4B. SUGGESTED MENTORING ACTIVITIES*

*What follows are the types of activities  
which you may want to consider for your own mentoring program.*

- Interview passengers and write a story about how they use the service, what they like about it and any challenges they encounter.

- Participate in volunteer training sessions. This helps the mentee learn the role of the volunteer within the organization.
- Discuss the key functions of the organization (e.g. providing transportation services to older adults).
- Discuss the key issues a manager needs to know and do regarding the way a transportation service functions within a community or a service area.
- Discuss the keys to success in managing staff, scheduling rides, operating vehicles, communicating with consumers? Discuss how the key functions impact on the ability of seniors to use your services; and any ways those functions could be changed so as to improve transportation services to seniors.
- Identify and discuss how the transportation needs of seniors differ from the needs of the general population, and what the mentor's service does to meet those needs.
- Discuss the service that is provided and explain how it benefits senior passengers, and if by benefitting senior passengers it benefits everybody.
- Write "an elevator message" in which each of you have 10 -12 seconds to respond to a question about the transportation service.

#### 4C. SAMPLE OF MENTEE/MENTOR EXPERIENCES

*The following list of activities were undertaken in the course of the Matching/Mentor pilot programs*

- A mentee was assigned primary responsibility to assess program staffing requirements, create a job description for a new hire, recruit, interview, test, select, and hire a new employee.
- One mentee was assigned primary responsibility to write a new "user manual" for a proprietary program software application.
- One mentee participated in assessments for enrollment at client homes and then performed client assessments alone.

Several mentors participated in the following activities:

- scheduling rides
- assistance in needs assessments and forecasting service needs
- recruitment and vetting of drivers
- communications with DMV and insurance providers
- preparation of correspondence with clients
- preparation of management reports
- participation in strategic planning process
- participation in volunteer training sessions
- preparation of job descriptions
- participation in interviewing and hiring new staff
- attendance at weekly staff meetings
- participation in preparation of driver manual
- coordination of updating the organization's transportation options booklet
- arrangement for publication translation into Spanish or other language

#### *4D. RESOURCE RECOMMENDATIONS*

(see Senior Transportation Resources and Exercises, pp. 31-44)

- The organization's policy and procedures manuals, its most recent organizational chart and grant applications that have been submitted, especially the scope of work sections.
- Beverly Foundation Fact Sheets on Volunteer Driver Programs, and Transportation Assistance for Seniors (see resources section, p. 33)
- Burkhardt, J. & Kerschner, H. (2005). How to Establish and Maintain Door-Through-Door Transportation Services for Seniors. Washington, D C: A Westat project for the US Administration on Aging, U.S. Department of Health and Human Services.
- Easter Seals (2004). A Solutions Package for Volunteer Transportation Programs: Transportation Solutions for Caregivers. Easter Seals. (see resources section, p. 33)
- Exercise #2 Volunteer Driver Program Elements: Part 1 & 2 (see exercises section, pp. 38-39)
- Kerschner, H. K. & Hardin, J. (2006). Transportation Innovations for Seniors: A Report from Rural America. Washington, DC: Partnership project and publication of the Beverly Foundation and the Community Transportation Association of America. (14 p.).

#### *Chapter 4 Highlights*

- Firsthand knowledge of all the a transportation service with respect to how it is organized, who it serves, how it serves them, and how it is managed and financed is important information for a mentee (or for any prospective senior transportation manager) to know.
- Understanding who the passengers are, where they need to go, how to get them to their destinations, and why they need transportation assistance, provides glimpses into the purpose of a community- based senior transportation services, and why it is important to seniors, their family members and the community.
- Volunteer driver programs rely heavily upon recruitment activities to maintain the volunteer driver service. Many programs say that volunteer drivers are the best recruiters of volunteer drivers.
- A thorough understanding of volunteer drivers, the barriers they face in agreeing to drive and their motivations for driving and continuing to drive is critical to understanding the success of the volunteer driver program.
- The success of a senior transportation and volunteer driver program depends heavily on how it functions within the community and its collaboration with other transportation and human services.





## *CHAPTER 5*

### *RESOURCE MANAGEMENT AND DEVELOPMENT*

#### *5A. TOPICS FOR DISCUSSION*

*The following topics and discussion questions offer an opportunity to review the organization's resource management practices, both human and financial, as well as resource development and fundraising activities, marketing and outreach activities, and resources acquired through linkages with other organizations.*

#### **(1) General Resources**

- a. What are your key resources today (money, vehicles, organizations, staff)?
- b. How do you acquire those resources?
- c. Has your resource base changed over time (e.g. financial, vehicles, staff, organizational sponsorship, experienced staff)?
- d. Where do your resources (e.g. above) come from and how do you acquire them?
- e. Are you pleased with your resource allocation? If so, why and if not, how would you like to reallocate your resources?

#### **(2) Financial Resource Management**

- a. What is your service's annual budget? (A copy of your annual budget may be helpful at this point.)
- b. What process does your service use in developing its annual budget?
  - year round process
  - budgeting by funding source
  - developing match requirements
  - budgeting for grant allocations
  - budgeting for development of reserves
  - budget development for inclusion in a larger organization's budget
- c. How do you monitor expenditures?
  - expense allocation by funding source
  - expense allocation by type of service developing reserves
  - other
- d. What types of internal controls do you maintain?
- e. What audits do you (or your sponsoring organization) perform?
  - annual review
  - annual financial audit
  - A -133 (federal funding report)

#### **(3) Human Resource Management**

- a. Who are the formal and informal leaders in the organization?
- b. What are the compensation ranges for selected employees?
- c. What benefits are offered and which employees are eligible?
- d. Do employees receive information (and/or training) specific to the employee handbook (which includes policies and procedures)?

- e. How many paid employees are trained and how are they trained?
- f. How many volunteers are trained and what training do they receive?
- g. Are paid staff treated differently than volunteers? If so, in what way?
- h. Does the organization have a staff development program, and if so, what resources are available to support staff development?

**(4) Development and Fundraising Methods**

- a. What types of development and fundraising activities are in place?
  - local government allocations and/or grants
  - state government allocations and/or grants
  - federal funding allocations and/or grants
  - proposals to local community groups and/or foundations
  - solicited and/or unsolicited donations
  - events
  - endowments
  - entrepreneurial ventures
  - planned giving
- b. What are the most successful and least successful fundraising activities?
- c. What standards are in place regarding development and fundraising?

**(5) Marketing and Outreach Activities**

- a. What community marketing/outreach efforts are undertaken?
  - transportation service passengers
  - churches and community groups
  - local businesses
  - volunteers, including volunteer drivers
  - funders
- b. What marketing/outreach efforts are undertaken with aging groups?
- c. What marketing/outreach efforts are undertaken with transit groups?

**(6) Linkage Relationships**

- a. What are examples of key relationships with organizations in the community: (e.g. transportation services, human services, faith groups, political entities, funders, government agencies)?
- b. What is important about the linkage relationships you have?
- c. What other linkage relationships would you like to have?
- d. What are some reasons it has been possible to create the linkage relationships you currently have in place?
- e. What are some reasons it hasn't been possible to create linkage relationships with key organizations?

*5B. SUGGESTED MENTORING ACTIVITIES*

*What follows are the types of activities  
which you may want to consider for your own mentoring program.*

- Organize a "shadow the mentor" week so the mentee can participate in resource development or outreach such as scheduling and monitoring staff.

- Meet together with the person in the organization responsible for identifying and cultivating fundraising sources and talk about issues that may affect future funding.
- Meet together with funding agencies of the transportation service.
- Participate together in fundraising and in grant preparation activities.
- Meet together to review and discuss marketing materials and advertising and outreach activities.
- Arrange for the mentee to experience professional opportunities such as:
  - review and revisions of reporting and invoicing procedures
  - review agency monthly income/expense reports with mentor
  - help prepare an annual budget
  - participate in budget meetings and pre-audit preparations
  - compare and analyze compliance with budget allocations using expense and financial reports
  - generate and analyze program data
  - participate in the annual audit
  - participate in fundraising events
  - prepare grant applications
  - participate in grant-writing sessions
  - help prepare performance reports for funders
  - prepare performance reports for funders
  - attend a fund development meeting
  - attend group meetings (inside and outside the organization)
  - assist in program outreach to aging and/or transportation services, and community groups
  - participate in local transportation advisory groups
  - attend network meetings, commission or other public meetings
  - participate in local aging advisory groups
- Arrange for mentee to experience educational activities such as:
  - a professional skill building seminars, workshops, and webinars
  - a local one-day course on importance and methods of setting work goals
  - an on-line course on methods of managing people
  - a local one-day course on fiscal controls
  - a local one-day course on tract compliance
  - a local one-day course on grant writing
  - a short course on professional communications
  - an internal seminar on expense reporting methods
- Discuss with mentee on topics such as:
  - key resources that are needed to operate a successful transportation service
  - fundraising “hook” and key “givers” to senior transportation service
  - key issues regarding the linkage relationships of a transportation service
  - advantages gained by marketing to and/or coordinating with others
  - reasons for challenges and successes in providing the transportation services to older adults

### *5C. SAMPLE OF MENTEE EXPERIENCES*

*The following list of activities were undertaken in the course of the Matching/Mentor pilot programs.*

- Mentee assistance in the implementation of new reporting and invoicing procedures necessitated by the adoption of SAFETEA-LU / New Freedom reporting guidelines and mentee was assigned primary responsibility for monthly reporting to funding agencies.
- Mentee attendance in meetings the mentor/manager was involved in both inside and outside the organization.
- Mentee attendance at marketing/partner development sessions that presented “a case for giving” presented by a Fund Development consultant.
- Mentee participation in national conferences with funding from the Beverly Foundation’s Matching/Mentor program funds including: the ASANCOA Conference, an NCST meeting, a TRB Meeting, and a GSA conference.
- Mentee reviewed agency monthly income/expense reports.
- Mentee preparation of proposals for printing & publication of informational materials (all proposals were funded).
- Mentee shadowing mentor at monthly aging and transportation meetings to learn outreach and advocacy skills.
- Mentee participation in line-of-credit negotiation meetings with bank officers.
- Mentee involvement in crisis management when anticipated funding was reduced as an outcome of the national financial crisis and mentee completion of paper about crisis management procedures and their general applicability to unexpected situations that might arise in day-to-day operations.

### *5D. RESOURCE RECOMMENDATIONS*

(see Senior Transportation Resources and Exercises, pp. 31-44)

- Organizational and volunteer driver program insurance policies, annual financial and program reports and Employee Handbook.
- Burkhardt, J. & Kerschner, H, K. (2005). How to Establish and Maintain Door-Through-Door Transportation Services for Seniors. Washington, D C: A Westat project for the US Administration on Aging, U.S. Department of Health and Human Services. (see resources section, p. 35)
- Exercise #3 Build Your Volunteer Driver Program: Parts 1, 2, 3, 4 and 5 (see exercises section, pp. 40-44)

## *CHAPTER 5 HIGHLIGHTS*

- An identification and discussion of day-to-day operations provides an opportunity to appreciate the importance of adherence to a strict budget and budget controls, budget development and monitoring, and financial audits.
- A review of the financial resources and procedures for reporting, reviewing; and auditing can contribute to an understanding of why a transportation service expends its resources and reports its expenditures, especially if it is a transportation service that is organized as a 501(c)3 that reports to its funding sources as well as to the IRS.
- The identification, discussion of and participation in methods used to document and record of expenditures are an essential part of the administrative process of any organization; and are experiences that generally are not gained in a traditional educational setting.
- An appreciation of fundraising, marketing, and outreach activities provide a way to understand the challenges of raising money as well as raising awareness of the senior transportation service and volunteer driver program, and why it is important to overcome those challenges in order to pave the way for short and long term sustainability.
- Whether linkage relationships with transportation and human service leads to improved service delivery of a single organization or coordination of activities and services, the establishment of relationships with other organizations will always ensure that the organization is communicating its message about the transportation needs and challenges to others in the community.



*SENIOR TRANSPORTATION RESOURCES*

*BEVERLY FOUNDATION RESOURCES*

*ARTICLES AND REPORTS*

*BOOKS*

*WEBSITES*

*SENIOR TRANSPORTATION EXERCISES*

*#1 THE 5 A'S & SENIOR FRIENDLINESS CALCULATOR*

*#2 VOLUNTEER DRIVER PROGRAM ELEMENTS*

**(PART 1: THE QUESTIONS)**

**(PART 2: THE REALITY)**

*#3 BUILD YOUR VOLUNTEER DRIVER PROGRAM*

**(PART 1: GOALS AND OBJECTIVES)**

**(PART 2: SERVICE PRIORITIES)**

**(PART 3: FUNCTIONAL/ORGANIZATIONAL PRIORITIES)**

**(PART 4: SERVICE AND DESIGN PRIORITIES)**

**(PART 5: REVISED GOALS, OBJECTIVES AND NEW MISSION)**

*BEVERLY FOUNDATION RESOURCES*  
*<http://www.beverlyfoundation.org>*

- Kerschner, H., and Aizenberg, R. (2001). Supplemental Transportation Programs for Seniors. Pasadena, CA: Beverly Foundation.
- Supplemental Transportation Services for Seniors (STPs) in America. (2004). Beverly Foundation Report. Pasadena, CA.
- TurnKey Kit: A Web-based Resource for Volunteer Driver Programs
- Kerschner, H. editor. (2006) *Stories from the Road...Stories from the Heart*. Pasadena, CA: Beverly Foundation.
- Kerschner, H., Svensson, C., and Sun, J. (2006). Volunteer Driver Recruitment: An Idea Book for Action. Pasadena: Beverly Foundation.
- Your STP Clearinghouse: A "How to Guide for Developing a State-Wide Clearinghouse of STPs." (2007). Beverly Foundation Report. Pasadena, CA.
- Kerschner, H., Rousseau, M-H., & Svensson, C. (2008). *Volunteer Drivers in America: The Hope of the Future*. Pasadena, CA: Beverly Foundation.
- The Beverly Foundation Fact Sheet Series 2008 (Vol. 1 #1-10) .
  - #1 The Beverly Foundation** (summary of activities)
  - #2 Giving Up the Keys** (challenge of driving cessation)
  - #3 STPs in America** (data on 820 Supplemental Transportation Programs for seniors)
  - #4 STPs in Rural America** (data on STPs in areas identified as rural)
  - #5 5 A's of Senior Friendly Transportation** (defines each of the 5 A's and includes a "senior friendliness" calculator)
  - #6 Volunteer Driver Programs** (data on 543 volunteer driver programs)
  - #7 Volunteer Drivers** (data on 714 volunteer drives)
  - #8 Transportation and Dementia** (assistance for people with dementia)
  - #9 The TRIP Model**, (emphasizes a low cost volunteer program model)
  - #10 STAR Search/Awards** (details Foundation's 2000-2007 Awards initiative)



## ARTICLES AND REPORTS

- Bailey, L. (2004). Aging Americans: Stranded Without Options. Surface Transportation Policy Project: Washington, DC. Retrieved June 22, 2010, from: <http://www.transact.org/report.asp?id=232>
- Burkhardt, J. E. (2007). High-Quality Transportation Services for Seniors. Rockville, Maryland: WESTAT. Retrieved October 1, 2010, from: <http://www.tc.gc.ca/eng/policy/transed2007-pages-1298-1894.htm>
- Burkhardt, J. & Kerschner, H. K. (2005). How to Establish and Maintain Door-Through-Door Transportation Services for Seniors. Washington, D C: A Westat project for the US Administration on Aging, U.S. Department of Health and Human Services. [http://www.beverlyfoundation.org/library/transportationassistance/HowToGuide\\_DoorThroughDoorTransportation.pdf](http://www.beverlyfoundation.org/library/transportationassistance/HowToGuide_DoorThroughDoorTransportation.pdf)
- Easter Seals (2004). A Solutions Package for Volunteer Transportation Programs: Transportation Solutions for Caregivers. Easter Seals. Retrieved June 29, 2011, from: [http://seniortransportation.easterseals.com/site/PageServer?pagename=NCST2\\_trans\\_care](http://seniortransportation.easterseals.com/site/PageServer?pagename=NCST2_trans_care)
- Foley, D. J., Heimovitz, H. K., Guralnik, J. M., & Brock, D. B. (2002). Driving life expectancy of persons aged 70 years and older in the United States. *American Journal of Public Health*, 92(8): 1284-1289.
- Hardin, J. (2003). Senior transportation: Toolkit and best practices. Washington, DC: Community Transportation Association of America. (116 p.). Retrieved October 1, 2010, from: [http://search.yahoo.com/search;\\_ylt=AirEU\\_BWJ81ydf9hi0Loht2bvZx4?fr=yfp-t-701s&toggle=1&cop=mss&ei=UTF8&p=senior%20transportation%20toolkit%20and%20best%20practices](http://search.yahoo.com/search;_ylt=AirEU_BWJ81ydf9hi0Loht2bvZx4?fr=yfp-t-701s&toggle=1&cop=mss&ei=UTF8&p=senior%20transportation%20toolkit%20and%20best%20practices)
- Kerschner, H. K. & Hardin, J. (2006). Transportation Innovations for Seniors: A Report from Rural America. Washington, DC: Partnership project and publication of the Beverly Foundation and the Community Transportation Association of America. (14 p.). Retrieved October 2, 2010, from: [http://web1.ctaa.org/webmodules/webarticles/articlefiles/Senior\\_Rural\\_Innovations.pdf](http://web1.ctaa.org/webmodules/webarticles/articlefiles/Senior_Rural_Innovations.pdf)
- Kerschner, H. K. & Rousseau, M. (2008). Volunteer drivers: Their contributions to older adults and to themselves. *Gerontology & Geriatrics Education*, 29(4): 383-97.

- Millar, W. (2008). Mobility management: A new role for public transportation. American Public Transportation Association. (6 p.) Retrieved October 1, 2010, from: [http://www.apta.com/gap/policyresearch/Documents/mobility\\_management.pdf](http://www.apta.com/gap/policyresearch/Documents/mobility_management.pdf)
- Molnar, L.J., Eby, D.W., St. Louis, R.M, and Neumeyer, A.I. (2007). Promising Approaches for Promoting Lifelong Community Mobility. 1-111. Washington, DC. AARP. [http://aarpvolunteers.com/dsp/Promising\\_FINAL.pdf](http://aarpvolunteers.com/dsp/Promising_FINAL.pdf)
- Rosenbloom, S. (2009). Meeting transportation needs in an aging-friendly community. *Generations*, 33(2): 33-43.
- Seniors Resource Center. (2007). Guide to a Successful Volunteer Driver Program. 1-16 plus helpful attachments. Denver. <http://www.srcaging.org/volunteerdriver> pdf of publication is on bottom left of page.
- U.S. Department of Transportation (2003). Safe Mobility for a Maturing Society: Challenges and Opportunities. DOT HS 809 745, Washington, DC: author. 31 p. Retrieved October 1, 2010, from: [http://web1.ctaa.org/webmodules/webarticles/articlefiles/safe\\_mobility.pdf](http://web1.ctaa.org/webmodules/webarticles/articlefiles/safe_mobility.pdf)
- United States Government Accountability Office, (2004, August). Transportation– Disadvantaged Seniors: Efforts to Enhance Senior Mobility Could Benefit from Additional Guidance and Information, Washington, DC. [www.gao.gov/cgi-bin/getrpt?GAO-04-971](http://www.gao.gov/cgi-bin/getrpt?GAO-04-971)

### *BOOKS*

- Bryson, John M. (2004). Strategic Planning for Public and Nonprofit Organizations: A Guide to Strengthening and Sustaining Organizational Achievement. San Francisco, CA: Jossey-Bass Publisher. John Wiley & Sons.
- Carlson, Mim & Donohoe, Margaret. (2010). The Executive Director's Guide To Thriving as a Nonprofit Leader, 2<sup>nd</sup> Edition. San Francisco, CA: Jossey-Bass Nonprofit Guidebook Series, John Wiley & Sons.
- Carlson, Mim & O'Neal-McElrath, Toni. (2008) Winning Grants Step by Step The Alliance for Nonprofit Management, San Francisco. CA: Jossey-Bass, John Wiley & Sons.
- Gross , Malvern J., McCarthy, J., & Shelmon, N. (2010). Financial and Accounting Guide for Not-for-Profit Organizations. New Jersey: John Wiley & Sons.
- Hopkins, Bruce R. (2010). The Law of Tax-Exempt Organizations. New Jersey: John Wiley & Sons.

- Levesque, Joseph D. (1992). Human Resource Problem-Solver's Handbook. New York: McGraw-Hill Companies.
- Renz , David O. (2010). Handbook of Nonprofit Leadership and Management (Essential Texts for Nonprofit and Public Leadership and Management). San Francisco, CA: Jossey-Bass, John Wiley & Sons, .
- Van Deusen, Edmund.(Ed.) (1977). Marketing Problem Solver, Radnor PA : Chilton Book Company, Library of Congress: ISBN 0-8019-6496-2
- Vroom, Victor H. (1990). Manage People, Not Personnel: Motivation and Performance Appraisal. Harvard Business School Press.
- Social Enterprise Alliance. (2010). Succeeding at Social Enterprise: Hard-Won Lessons for Nonprofits and Social Entrepreneurs. San Francisco, CA: Jossey-Bass, John Wiley & Sons.

#### *WEBSITES*

AAA Foundation for Traffic Safety <http://www.aaafoundation.org>

AARP <http://www.aarp.org>

Alliance for Nonprofit Management <http://www.allianceonline.org>

American Management Association <http://www.amanet.org>

American Society for Training and Development <http://www.astd.org>

American Society on Aging <http://asaging.org>

American Public Transportation Association <http://apta.org>

Beverly Foundation <http://www.beverlyfoundation.org>

Community Transportation Association of America <http://www.ctaa.org>

STP Exchange <http://www.stpexchange.org>

*EXERCISE #1*  
*THE 5 A'S*  
*AND*  
*THE SENIOR FRIENDLINESS CALCULATOR*

Public and Paratransit Services 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 these services 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 levels have defined the 5 A's. Today they have been adopted as criteria for standards in senior transportation. 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 or benchmarks that help move coordination initiatives forward.

***The Beverly Foundation's 5 A's of Senior Friendly Transportation***

The 5 A's include the five key factors below.

**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.

The Senior Friendliness Calculator is on the next page.

## 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 a transportation with which you are familiar. 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 the transportation service is...  
"On The Road to Senior Friendliness."

**Availability :** The Transportation Service....

- provides transportation to seniors
- can be reached by the majority of seniors in the community
- provides transportation anytime (day, evenings, weekends, 24/7)
- can take riders to destinations beyond city & county boundaries
- maintains organizational relationships with human service agencies

**Acceptability:** The Transportation Service...

- uses vehicles that are easy for seniors to access
- offers "demand response" with no advance scheduling requirement
- provides driver "sensitivity to seniors" training
- adheres to narrow "window of time" for home and destination pick up
- ensures cleanliness and maintenance of vehicles

**Accessibility:** The Transportation Service...

- can accommodate the needs of a majority of elders in the community
- has information program for improving senior transportation knowledge
- can provide "door-thru-door" transportation when needed
- can provide services to essential and non-essential activities
- can link seniors with "more appropriate" transportation options

**Adaptability:** The Transportation Service...

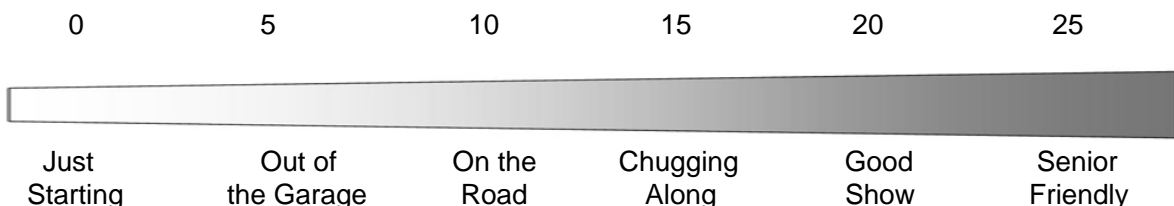
- will provide transportation escorts when needed
- can provide multiple stop trips for individual passengers
- can access vehicles that accommodate wheelchairs and walkers
- maintains a policy of "adapting the system to meet needs of seniors"
- undertakes annual senior customer survey for service improvement

**Affordability:** The Transportation Service...

- offers reduced fares (or free transportation) to senior passengers
- secures funding specifically to support senior transit services
- offers opportunity to purchase monthly pass instead of paying cash
- offers options for purchasing tickets by mail or the internet
- uses volunteer drivers to reduce costs for providing "extra" services

**Total** (Possible Score = 25)

### The Road to Senior Friendliness



## EXERCISE #2

### PART 1: VOLUNTEER DRIVER PROGRAM ELEMENTS: THE QUESTIONS

What follows are factors suggested features of any volunteer driver program.  
(Check each feature below yes if it is correct or no if it is incorrect.)

**Yes No**

- |                          |                          |   |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | 1. Do volunteer driver programs only serve senior passengers?                         |
| <input type="checkbox"/> | <input type="checkbox"/> | 2. Can volunteer driver programs only use the vehicles of volunteer drivers?          |
| <input type="checkbox"/> | <input type="checkbox"/> | 3. Are paid drivers inappropriate staff for volunteer driver programs?                |
| <input type="checkbox"/> | <input type="checkbox"/> | 4. Do all volunteer driver programs go to life-enriching destinations?                |
| <input type="checkbox"/> | <input type="checkbox"/> | 5. Can all volunteer driver programs provide door-thru-door assistance?               |
| <input type="checkbox"/> | <input type="checkbox"/> | 6. Do volunteer driver programs need to have defined service areas?                   |
| <input type="checkbox"/> | <input type="checkbox"/> | 7. Are volunteer driver programs most appropriate for urban areas?                    |
| <input type="checkbox"/> | <input type="checkbox"/> | 8. Do all volunteer driver programs schedule passenger rides?                         |
| <input type="checkbox"/> | <input type="checkbox"/> | 9. Are volunteer driver programs usually so small they do not need software?          |
| <input type="checkbox"/> | <input type="checkbox"/> | 10. Do most volunteer driver programs only provide round-trip service?                |
| <input type="checkbox"/> | <input type="checkbox"/> | 11. Is it important for volunteer driver programs to be a free-standing organization? |
| <input type="checkbox"/> | <input type="checkbox"/> | 12. Do all volunteer driver programs operate low-cost transportation services?        |
| <input type="checkbox"/> | <input type="checkbox"/> | 13. Are volunteer driver programs unsafe for drivers or passengers?                   |
| <input type="checkbox"/> | <input type="checkbox"/> | 14. Do drivers' automobile insurance premiums increase if they volunteer to drive?    |
| <input type="checkbox"/> | <input type="checkbox"/> | 15. Must volunteer driver programs charge for rides to support their services?        |

\_\_\_\_ Total (The vast majority (all) of your answers should be "no")  
(See next page for brief answers to each of the 15 questions above)

*Informational and technical materials in the resource section will be helpful in answering the above and many other questions related to volunteer driver program transportation service delivery. The two materials below that should be especially helpful.*

- *TurnKey Kit: A Web-based Resource for Volunteer Driver Programs*
- *Fact Sheet #6 Volunteer Driver Programs (data on 543 volunteer driver programs)*

## EXERCISE #2

### PART 2: VOLUNTEER DRIVER PROGRAM ELEMENTS: THE REALITY

Below are fifteen realities of volunteer driver transportation programs.\*

1. While volunteer driver programs often serve senior passengers, those who are served may be dictated by the population targeted, sponsoring organization, or funding sources.
2. In addition to “volunteer” vehicles, volunteer driver programs often own and/or lease vehicles, although vehicle ownership can increase the costs of providing service.
3. Many volunteer driver programs include volunteer and paid drivers, although paying drivers can increase the costs of providing transportation services.
4. Volunteer driver programs often limit their transportation destinations, although destinations are often dictated by factors other than passenger transportation needs.
5. Volunteer driver programs generally provide assistance, however, curb-to-curb or even door-to-door assistance may not meet the support needs of senior passengers.
6. Many volunteer driver programs do not define or limit their service area and thus are able to cross jurisdictional boundaries beyond the city, county, and even the state boundaries.
7. While there are many volunteer driver programs in urban areas, the majority are located in rural areas and serve rural passengers.
8. Although most volunteer driver programs schedule rides, the TRIP model and specialized, low-cost software allows riders and drivers to schedule their own rides.
9. Regardless of their size, inexpensive software can assist volunteer driver programs in scheduling rides and in managing data related to the delivery of transportation services.
10. Each stop is counted as a one-way ride, and many volunteer driver programs provide trip-chaining service which allows for multiple stops during a single trip.
11. While some volunteer driver programs are independent, free-standing organizations; the majority are located within a menu of services.
12. A volunteer driver program can provide transportation services for exceptionally low-cost, however, adding paid drivers, owning vehicles, incurring expensive overhead costs can dramatically increase the costs of delivering service.
13. Volunteer driver programs are exceptionally low-risk transportation services in that they have very few crashes involving bodily injury or property damage.
14. Auto insurance premiums are based on miles driven, not who is riding in the car, so premiums should not increase because the car’s owner volunteers to drive.
15. Volunteer driver programs need financial support for the rides they provide: although the majority use grants, donations, contributions, and fundraising activities to support their services, a small minority charges a fee for providing rides.

*\*Most of the facts (above) were gleaned from The Beverly Foundation database which includes data on almost 1,000 volunteer driver programs. This exercise was created by the Beverly Foundation in 2010.*

*EXERCISE #3 BUILD YOUR VOLUNTEER DRIVER PROGRAM*  
*PART 1: GOALS AND OBJECTIVES*

*Goals*

A goal is often an idea related to purpose, organizational end-point, or plan of action which is envisioned as a desired result to be achieved over the long term.

Every volunteer driver program has at least one goal. On the lines below, state the major goal of the program.

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*Objectives*

An objective is a narrow plan with specific, measurable, fact-based, and tangible actions, to be achieved within the medium term.

Every volunteer driver program has several objectives. On the lines below state the objectives of your volunteer driver program.

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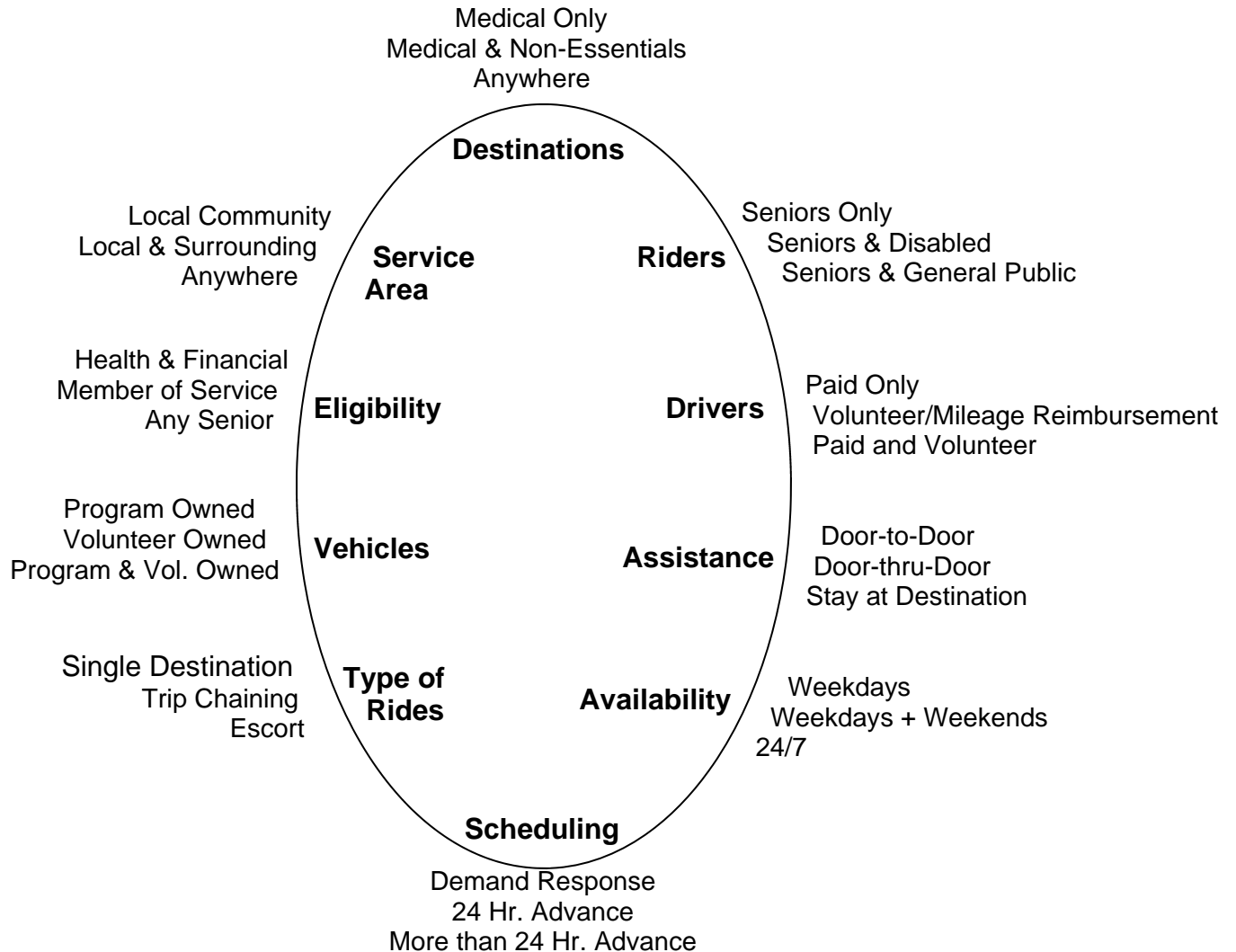
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## EXERCISE #3: BUILD YOUR VOLUNTEER DRIVER PROGRAM

### PART 2: SERVICE PRIORITIES

On the illustration below, study each service elements of a volunteer driver program and consider how each might impact on the administrative requirements and costs of your program. Now, circle one of the service elements (in each component) that you envision for your program.



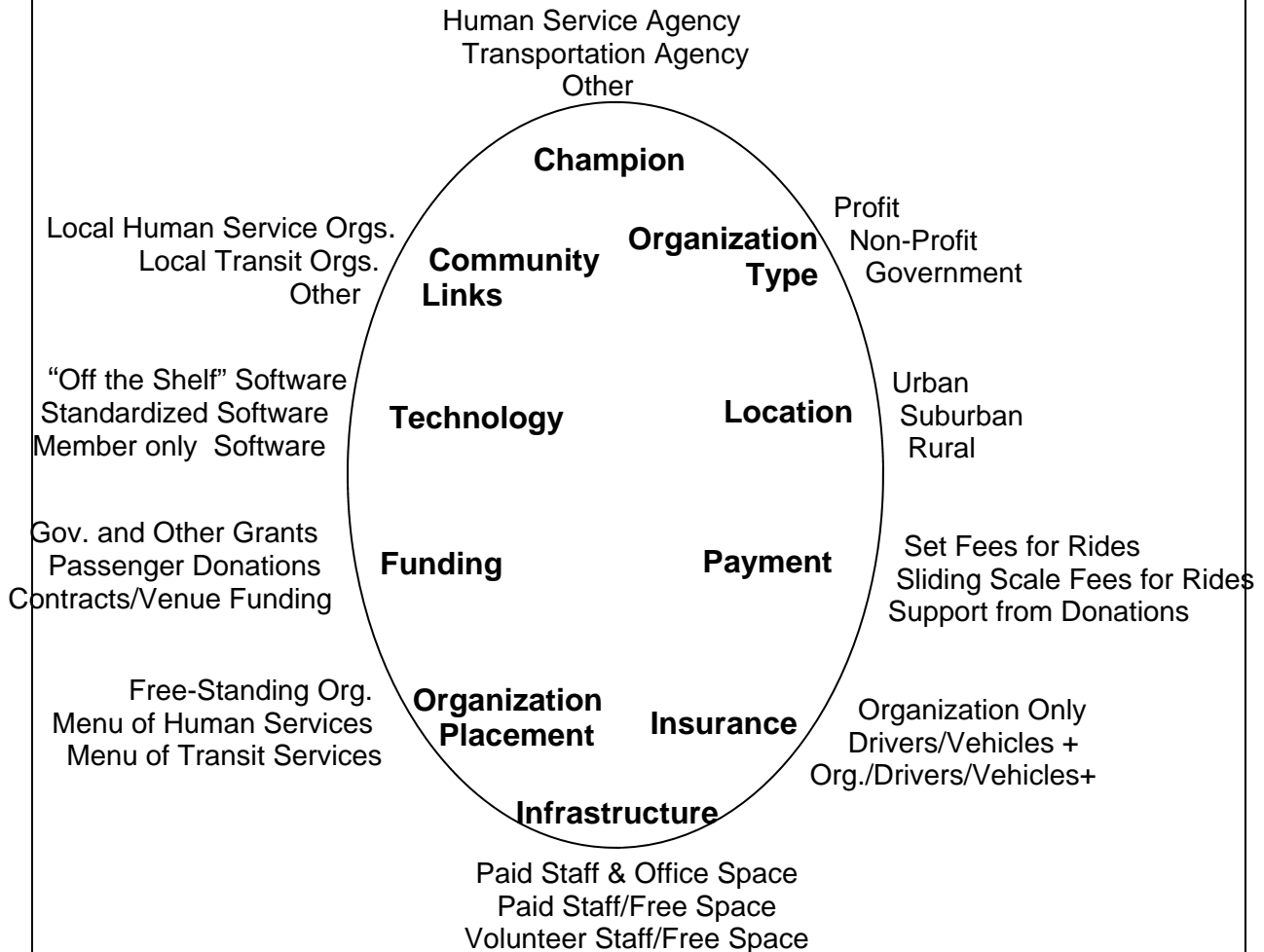
There undoubtedly are many other service components in volunteer driver programs. For example, scheduling rides might also include evenings, Saturdays, and Sundays. However, as you will see, your review can help you get you started in identifying the service components and elements of your volunteer driver program.

The results of this practice will be helpful when you do Part 4.

*EXERCISE #3 BUILD YOUR VOLUNTEER DRIVER PROGRAM*

*PART 3: FUNCTIONAL/ORGANIZATIONAL PRIORITIES*

On the illustration below, study each design component of a volunteer driver program and consider how each might impact on the administrative requirements and costs of your program. Now, circle one of the design elements (in each component) that you envision for your program.



There undoubtedly are many other design components in a volunteer driver programs. However, your review should help you identify the design components and the choices you can make in how you organize them.

The results of this practice will be helpful when you do Part 4.

*EXERCISE #3 BUILD YOUR VOLUNTEER DRIVER PROGRAM*  
*PART 4: SERVICE AND ORGANIZATIONAL PRIORITIES*

*Service Priorities*

Now, review the results of your Service Priorities Exercise (Part 2) and review each of the elements that you circled in your exercise. Now, enter the results on your Service Priorities chart below

<b>Destinations</b> Element_____	<b>Vehicles</b> Element_____	<b>Types of Rides</b> Element_____
<b>Riders</b> Element_____	<b>Assistance</b> Element_____	<b>Availability</b> Element_____
<b>Drivers</b> Element_____	<b>Scheduling</b> Element_____	<b>Service Area</b> Element_____
	<b>Eligibility</b> Element_____	

*Organizational Priorities*

Now review the results of your Functional/Organizational Priorities Exercise (Part 3), and identify each of the elements that you circled in your exercise. And now, enter the results on your Organizational Priorities Chart below

<b>Champion</b> Element_____	<b>Payment</b> Element_____	<b>Organization Placement</b> Element_____
<b>Organization Type</b> Element_____	<b>Insurance</b> Element_____	<b>Funding</b> Element_____
<b>Location</b> Element_____	<b>Infrastructure</b> Element_____	<b>Technology</b> Element_____
	<b>Community Links</b> Element_____	

*EXERCISE #3 BUILD YOUR VOLUNTEER DRIVER PROGRAM  
PART 5: REVISED GOALS, OBJECTIVES AND NEW MISSION*

*Goals*

On the lines below, state the goal (and perhaps the revised goal) of the volunteer driver program.

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*Objectives*

On the lines below state the objectives (or perhaps the revised objectives) of the volunteer driver program.

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*Mission*

On the lines below, summarize the mission of volunteer driver program

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Congratulations!!!  
**You are well on your way of planning a volunteer driver program!!!**

*(This exercise was originally developed by the Beverly Foundation in 2008)*

*ABOUT THE BEVERLY FOUNDATION*  
*...Enhancing Transportation Options for Older Adults...*

Organized in 1977 as a non-profit operating foundation in Pasadena, California, the Beverly Foundation relocated to Albuquerque, New Mexico at the end of 2008. While its initial support was provided by Beverly Enterprises, the corporation provided the Foundation with its own corpus of funding in the mid-1980's.

Today, the Beverly Foundation's mission is to foster new ideas and options to enhance mobility and transportation for today's and tomorrow's older adults. In keeping with its mission, the Foundation dedicates its resources...

- ...to generate new ideas (through STAR Search and related research activities)
- ...to promote awareness (through the preparation of informational materials)
- ...to connect seniors with transportation options (via information dissemination)
- ...to build capacity (through technical materials and training activities)
- ...to recognize excellence (through the STAR Awards program)
- ...to prepare for the next generation (through the Matching/Mentor program)

In order to spread its message and influence beyond its immediate location, the Beverly Foundation partners with a variety of national organizations to undertake research, develop technical materials, and disseminate information. These partnerships not only leverage the Foundation's financial and technical resources, but also ensure the success of its keystone programs. The initiative that resulted in this workbook, the Matching/Mentor program, is a major initiative of the Beverly Foundation.



## ***Beverly Foundation***

*Located in Albuquerque, NM, the Beverly Foundation's mission  
is to foster new ideas and options  
that enhance mobility and transportation  
for today's and tomorrow's older population.*

*The Beverly Foundation  
is a private operating foundation that  
undertakes research, provides awards, and prepares technical materials.*

For more information about volunteer drivers please visit:  
[www.beverlyfoundation.org](http://www.beverlyfoundation.org)