

# **Volunteer Driver TurnKey Kit**

**Planning Implementation Evaluation**



## SAMPLE BUSINESS PLAN

FOR

*TRIP* MODEL

1. Identify Managing Organization Name and Address

**PDF of Pasadena  
155 S. Mentor  
Pasadena, CA 91106**

2. Identify Managing Organization Type and Tax Status.

**Non-profit 501(c)(3) public benefit corporation**

3. State Mission and Purpose of Managing Organization.

**To enhance mobility and transportation for older adults.**

4. Describe Proposed Service. (Who will be served and how the service will be provided?)

**To provide alternative transportation for older adults who can no longer drive or use public or paratransit services because of physical and/or mental limitations. The service can be available 24/7 and will provide transportation to any location within a 30 mile radius of the PDF of Pasadena office. The service will be organized with volunteer drivers (who use their own vehicles to provide rides); with riders (who recruit their own drivers); and with ride scheduling (organized by mutual agreement between riders and drivers).**

5. Review Existing Transportation Options (services provided, service area; customers served, service strengths and weaknesses).

**The County operates a light rail transit to various locations within the county as well as several commuter bus options. The city contracts with Pasadena Transit Company to operate a single bus circulator on an hourly schedule on the main streets of Pasadena and a Dial-A-Ride service both of which provide services within the jurisdictional boundaries of Pasadena. Seniors must be able to walk or ride to the bus stop to access city operated transportation or walk or ride to the curb to access Dial-A-Ride services. People who live in the rural areas around Pasadena are not currently served by any public transportation system. No services are available which provide door-to-door or door-through-door assistance, or assistance at the destination.**

\* This sample plan is based on a hypothetical organization with hypothetical examples.



6. Explain How Proposed Service Complements or Supplements Transit Services as Above. (Does a clear need exist for proposed service?)

**PDF of Pasadena will provide the following assistance to passengers:**

- **Door-to-door assistance**
- **Door-through-door assistance**
- **Assistance at the destination**

**PDF of Pasadena also will:**

- **Provide transportation to destinations beyond the boundaries of the city (within a 30 mile radius of the PDF office)**
- **Offer services on a no fee basis (it will, however, accept donations)**
- **Offer the possibility of transportation on a 24/7 basis**

**The proposed services both compliment and supplement existing public services by providing assistance to frail, older adults beyond city boundaries with the possibility of 24/7 service delivery; and because of the volunteer component of the service and the collaboration of other community organizations, at an expense that will be far less than what it would cost Pasadena Transit Company or Dial-A-Ride to expand their capacity to provide similar services.**

7. Estimate the Needs of Seniors for Transportation Services and Potential for Meeting Needs. (How many drivers will be involved, how many people will be served, how many rides will be provided?)

**Approximately 3,000 adults age 85+ live in Pasadena and approximately 10% (300 potential passengers) could benefit from the rides provided by PDF of Pasadena. Transportation services are planned as follows:**

**Year 1: 50 volunteer drivers, 50 riders, 2 rides per week each, 400 rides per month  
Year 2: 75 volunteer drivers, 75 riders, 2 rides per week each; 600 rides per month  
Year 3: 100 volunteer drivers, 100 riders, 2 rides per week each; 800 rides per month**

**While it is expected that only 100 of the 300 potential passengers will be served by year 3, it is expected that other social service and volunteer organizations will follow the lead of PDF of Pasadena in providing transportation services that meet the needs of older adults who need assistance and support.**

8. Is Planned Transit a Stand Alone Service or a New Menu Item On An Already Existing Menu of Human and/or Transit Services?

**PDF of Pasadena will be added to the menu of services currently offered by HOA of Pasadena. These services include case management, information and referral, and nutrition services including meals on wheels and congregate dining. HOA of Pasadena will be the sponsor of the transportation service.**



9. Identify Any Partners That Will Be Involved (sponsoring organization, human service agencies, transportation services); What Each Partner Might Bring Might Bring To The New Service; and How the Partnerships Might Be Established.

1. HOA of Pasadena, a senior service organization, will serve as the PDF of Pasadena sponsor.
2. The Pasadena Junior League and the Pasadena Community Foundation have offered to provide financial resources to support the program for its first year of operation.
3. The AAA Club of Pasadena will print all informational and advertising materials related to the project, and will provide The Older Wiser Driver videos to each of the program's volunteer drivers.
4. The Pasadena Community Hospital (which provides space for HOA of Pasadena) will provide office space and logistics support for the PDF of Pasadena program.
5. The Pasadena Transportation Service will provide driver training activities and funds for reimbursing drivers for mileage\*.

*\*total reimbursement based on the following formula:*

$$\text{Rides Per Year (4,800)} \times \text{Average Miles Per Ride (5)} \times \text{Reimbursement rate (.30)} = \$7,200$$

10. Identify Required Governmental Approvals or Licenses and How They Will Be Obtained.

**All necessary authorizations are in place. As PDF of Pasadena is an established 501(c)(3) and does not charge fees for providing transportation, it does not require a license to do business in Pasadena or in the State of California.**

11. Estimate the Type and Number of Vehicles Needed, How Vehicles Will Be Obtained, and their Acquisition Expense.

**No vehicles will be purchased, as volunteers will drive their own vehicles. However, insurance will be secured including: a commercial insurance policy (to cover the sponsor for liability related to driver recruitment, screening, verification and training) and insurance to cover transportation service delivery (to cover volunteer drivers, riders, and road users). Such insurance will include: excess auto liability, driver liability, and volunteer liability insurance.**

12. Estimate Staffing Requirements to Provide Service. (Can existing staff be used by job enrichment, enlarged or rearranged or will new staff have to be added?)

**Only one staff person (the PDF manager) will be required to organize and operate PDF of Pasadena. The manager will publicize the program, review and approve rider applications, document rider information, document driver information (drivers license, current state required insurance) and maintain records on destination travel. The sponsor (HOA of Pasadena) will maintain financial records and reimburse riders for mileage (who will give mileage reimbursements to their drivers).**



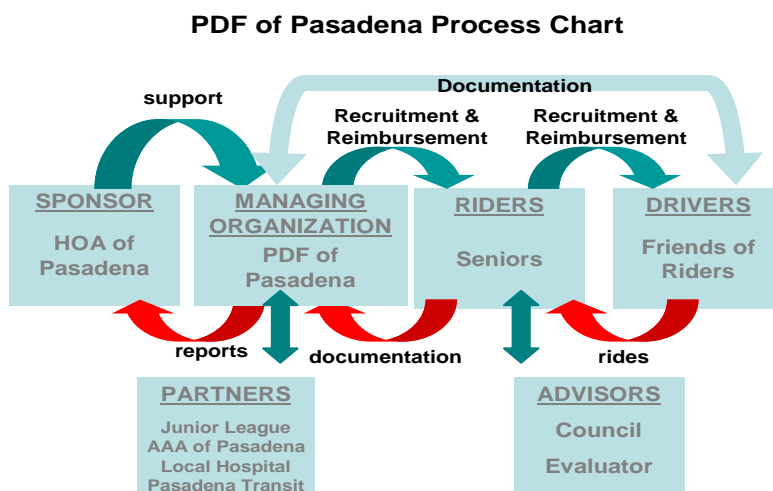
13. Detail How the Use of Volunteers and Linking Relationships Will Reduce Program Expenses, Especially Staff. (Consider developing and attaching job descriptions for all staff and volunteer positions.)

The low cost/low maintenance approach of the *TRIP* model dramatically reduces the need for administrative staff

1. It eliminates the need to recruit drivers (drivers are recruited by riders).
2. It eliminates the need for scheduling and dispatch services (scheduling is arranged between riders and drivers).
3. It eliminates the need to purchase and maintain vehicles (vehicles are provided by drivers).
4. It eliminates the need for expensive insurance coverage (it does not own vehicles).
5. It eliminates the need for staff involvement in training (training will be provided by the city's transportation service).
6. It eliminates the need for in-house accounting (bookkeeping and check preparation will be undertaken by the local hospital).
7. It minimizes staff time needed for record keeping (volunteers who do not want to drive will maintain rider and driver files).
8. It offers the potential of substantial in-kind support to the program (if volunteer hours are tracked).

In sum, the design of the program (the use of the *TRIP* model), an extensive use of volunteers in driving, and creative collaboration with community agency shareholders, minimizes the total funding requirements for the addition of the proposed service.

14. Prepare An Organizational Chart or Process Chart for Your Proposed Service. (Below is a process chart for a model *TRIP* program).





15. Describe the Application Process for both the Riders and Drivers and The Approval Process for Their Participation in the Program.

1. The prospective rider calls PDF of Pasadena to inquire about service.
2. An information packet sent to prospective rider.
3. The Rider completes and returns application packet (which includes information about neighbor or friend who will act as driver).
4. The program manager (and a possible review committee) reviews rider applications (and reviews information about the prospective driver).
5. Program information in driver packet is sent to the driver with request for driver to provide information (completed driver application form, copy of current license, proof of minimum state requirement for insurance, and agreement to participate in driver training provided by Pasadena Transportation Company).
6. The driver returns requested information, with signed agreement for training.
7. The program manager contacts Pasadena Transportation Company regarding training.
8. The driver participates in the driver training program.
9. The new rider is informed that application and training process is complete and both the rider and driver are officially welcomed into the program.
10. Riders and drivers arrange rides and submit paperwork for mileage reimbursement.

16. Describe How the Service Will Be Introduced and Marketed (including media to be used and messages to be developed).

1. Print material will be developed by the program sponsor and manager (with assistance from professionals who contribute their expertise, and the local AAA Club will print Morganfield Bus will publish and distribute information about new routes and schedules.
2. The Junior League will distribute materials to its membership, the local newspaper, senior newspapers, senior centers, and to community service and volunteer groups throughout the city of Pasadena.
3. The Pasadena Transit Company will develop and posters about the service and place them on its vehicles, as well as make them available to Dial-A-Ride vehicles.
4. Riders and drivers will have program orientation experiences and be given informational packets about the program to enable them to cultivate "word of mouth" advertising are expected to serve as "word of mouth."

17. Identify Sources of Funding and Steps Necessary to Secure Funding (Sponsors, grants, service fees, fund raising events, charitable donations, etc.)

**PDF of Pasadena will not charge fees for providing transportation but rather will rely on the following sources of funding for its start up and initial operation.**

1. The Pasadena Community Foundation will provide funds for planning and for 50% of operating budget for years 1, 2, and 3.
2. The HOA, the program sponsor, will provide 25% of the operating funds for years 1, 2, and 3.



3. A local philanthropist will provide 25% of the operating funds for year 1.
4. The Junior League of Pasadena will donate 25% of the operating funds for year 1.
5. The Pasadena AAA Club will donate funds for informational and marking materials.
6. Riders and their families will be given the opportunity to make donations to the program.
7. During the planning and first year of operations, fundraising efforts will include the preparation of grant applications, and presentations to the city council.
8. Local business partnerships will be explored with solicitations to local businesses that are frequent destinations of the riders. Each Business Partner will be asked to make an annual contribution to support PDF of Pasadena. Each Business Partner will receive special mention in the program's monthly newsletter.
9. The Pasadena Community Hospital will donate space and logistics support for the program, and the Pasadena Community Transit will donate training and informational materials.
10. Volunteer driver hours will be tracked to maximize in-kind contributions.

18. Identify the Responsible Parties for Implementing Business Plan (including any plans for advisory committees, meeting schedules and activities in which they will be involved).

The PDF program manager, will have primary responsibility for program planning and operations. The manager (with the advice of HOA staff) will establish an Oversight and Advisory committee made up of representatives from human service agencies, transportation service organizations, volunteer groups, churches and interfaith groups, health providers, the business community; and local administrative elected officials. Each member of the Advisory and Oversight Committee will provide their organizational and staff support of the program, as necessary. The committee will meet on a quarterly basis. It will review and comment on rider and driver applications, on the evaluation of the project activities to date (including meeting goals for rider and driver involvement), will review financial expenditures for mileage reimbursement, and will assist with fundraising,

19. Determine How Success of Program Will Be Evaluated.

The program will involve an evaluation expert from the local university to develop an evaluation plan with program and sponsor staff prior to the start up of operations, and monitor quarterly progress with the advisory committee. The time and expertise of the evaluator will be provided as an in-kind contribution to the program.

20. Prepare a Projected Budget for the First Three Years of PDF of Pasadena.