Alan M. Voorhees Transportation Center
Edward J. Bloustein School of Planning and Public Policy

Safe Mobility at Any Age Policy Forum Series

Summary Proceedings

Forum No. 5
September 28 , 2004

Proceedings prepared and published by:

Alan M. Voorhees Transportation Center
Edward J. Bloustein School of Planning and Public Policy

and

New Jersey Foundation for Aging

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THE STATE UNIVERSITY OF NEW JERSEY
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SAFE MOBILITY AT ANY AGE
POLICY FORUM SERIES

SUMMARY PROCEEDINGS

September 28, 2004
Forum

Proceedings prepared and published by:

Alan M. Voorhees Transportation Center
Edward J. Bloustein School of Planning and Public Policy
Rutgers, The State University of New Jersey
33 Livingston Avenue – Suite 500
New Brunswick, New Jersey 08901
732/932-6812 x700 ♦ 732/932-3714 (fax)
Internet: www.policy.rutgers.edu/vtc

and

New Jersey Foundation for Aging
176 West State Street
Trenton, New Jersey 08608
609/421-0206 ♦ 609/421-2006 (fax)
Internet: www.njfoundationforaging.org

FOREWORD

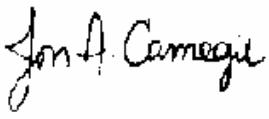
On September 28, 2004, some 60 attendees participated in the fifth meeting of the **Safe Mobility at Any Age** policy forum series. Forum speakers presented information related to volunteer driver programs as a community transportation strategy to enhance senior mobility. Speakers representing a variety perspectives discussed specific components of their programs and topics such as volunteer insurance and risk management.

The policy forum series is cosponsored by the Alan M. Voorhees Transportation Center and the New Jersey Foundation for Aging. The topic of safe mobility has far-reaching policy implications related to public health, public safety, community development and personal autonomy across all age groups. The forum sessions target and focus attention on different aspects of this multi-sided issue, bringing together policy and regulatory experts from inside and outside of New Jersey to aid the discussions. The forum series is laying the foundation for and will culminate in a final summary report that makes recommendations for future policy and legislative initiatives to address safe mobility for older drivers in New Jersey.

The sixth and final forum meeting will engage participants in a discussion of systemic and integrated policy reforms aimed at ensuring safe mobility at all levels. We strongly urge all participants to attend the final meeting because Safe Mobility at Any Age touches many aspects of our professional and personal lives. Sharing a broad range of expertise will help to inform participants and engage us all in finding the best set of recommendations for family members, as well as community, transportation and health care professionals.

Our hope is that this policy series stimulates attention on safe mobility issues from a broad range of practitioners and interest groups; that this consortium of interests recognizes the benefit of sharing perspectives; and that together, New Jersey can develop best practices through policy and legislation that move in the direction of safer mobility at all ages.

With this in mind, we present the summary proceedings of the fifth policy forum. We hope you find them interesting and informative.



Grace Egan, MS
Executive Director
New Jersey Foundation for Aging

Jon A. Carnegie, AICP/PP
Assistant Director
Alan M. Voorhees Transportation Center

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SUMMARY PROCEEDINGS

WELCOMING REMARKS

Grace Egan, executive director of the New Jersey Foundation for Aging, welcomed participants and gratefully acknowledged the five sponsors of the Safe Mobility at Any Age policy forum series. She also thanked the forum's co-sponsor, the Alan M. Voorhees Transportation Center (VTC). Attendees were referred to the VTC website (www.policy.rutgers.edu/vtc) for copies of the proceedings from the first four policy forums. Acknowledging the panel of speakers assembled for the fifth policy forum, Ms. Egan noted that the topic of volunteer driver programs to provide transportation for senior citizens and the disabled is a critical area for forum participants to investigate and consider.

SPEAKER PRESENTATIONS

Surviving without Driving: Creating Sustainable Transportation for Seniors

Katherine Freund, executive director of the Independent Transportation Network (ITN*America*), was the first presenter. Ms. Freund began her presentation by explaining that ITN*America* is a non-profit organization located in Maine that seeks to meet the mobility needs of the aging population by offering transportation services via automobile with paid or volunteer drivers 24 hours per day/7 days per week. She emphasized that the program is sustained through rider fares and financial support from local donors, not government subsidies.

How ITN works - Ms. Freund explained that ITN blends the benefits of personal transportation with some of the efficiencies off mass transit by promoting ridesharing and advance trip scheduling. The organization has just completed the first phase of its three-phase core project, which was to create an economically sustainable model for meeting the transportation needs of the aging population. The next two phases will involve "scaling up" or expanding the use of the model by other non-governmental organizations in other locations throughout the country.

ITN passengers are charged by the mile for their trips. For the reporting period July 1, 2003 to June 30, 2004, total revenue from 15,274 rides was $117,158. Paid drivers gave 65 percent of those rides and volunteer drivers were used for 35 percent. Ms. Freund emphasized that ITN considers volunteers an extremely valuable resource and she described the characteristics of the program's volunteer corp. For example, in fiscal year ending June 30, 2004, ITN had 50 active volunteers, 29 of whom were male and 21 female. The mean age of volunteers was 58 and the median age was 63. The total number of volunteers ever recruited for the program was 232 and 20 new volunteers (15 active) were recruited last year.

Volunteers are offered reimbursement (25 cents per mile) for the miles driven with a passenger in the vehicle. Interestingly, 68 percent of volunteers working in the past fiscal year opted to redirect their reimbursement back to the program. For miles driven with no passenger in the vehicle (e.g. to/from passenger trips), volunteers earn transportation "credits/miles", which they can opt to save as a type of transportation "social security" to be used when they need rides as they age or they can opt to donate or assign the credits earned to other individuals or ITN programs. For example, miles can be donated to other ITN customers, to a favorite group, family/friend and/or to the Community Road Scholarship or the Road Scholarship Fund.

The Community Road Scholarship is an initiative that offers a community the opportunity to acquire transportation credits for their residents if they work with ITN to recruit new volunteers. Recruited volunteers agree to donate their credits to the community that recruited them and the credits are used by community residents. The Road Scholarship Program offers credits to low-income riders. For the period July 1, 2003 to June 30, 2004, 46 percent of volunteers opted to donate their transportation credits to ITN.

Ms. Freund reported that ITN surveys reveal a variety of reasons why senior citizens need alternative transportation. These include their geographic dispersment (often in suburban locales), the difficulty they experience in using traditional public transit or the lack of such services, the need for personal assistance with things such as negotiating curbs, dealing with packages, using seatbelts and doors and their willingness and/or ability to pay for transportation services.

The ITN model uses technology - Ms. Freund explained that there are two logistical approaches to using volunteer drivers efficiently. One is a low technology approach, which in essence is the classic escorted ride model where a driver will accompany the rider and remains with the rider for the duration of the trip (e.g., doctor's appointment or time shopping). This results in significant "down time" for the driver but absent a means of scheduling and dispatching a driver to provide the return trip, this approach ensures a ride home.

The other approach is a high technology model that typically does not involve the volunteer driver escorting the rider for the entire time of the trip. Instead, the driver drops off/picks up the rider. The driver then services other riders in the available time between pick up/drop off of the initial rider. It was noted that those riders in need of an escort for the entire duration of their trip are permitted by ITN to travel with a companion, free of charge. Ms. Freund reported that this latter approach to managing volunteers is made efficient and effective by using computers and information system management. She suggested that broader use of technology could significantly increase efficiency the field of mobility management,.

Ms. Freund reported that technology also assists ITN to manage volunteer information effectively. For example, ITN maintains and regularly updates detailed volunteer accounts with information pertaining to the number of miles driven, credits earned, reimbursements given and donations made to the Road Scholarship program. In

addition, volunteer availability and attributes/characteristics of volunteers (e.g. vehicle type, volunteer location, personality etc.) are recorded. She explained that ITN databases assist with the management of all this information.

Volunteer recruitment, screening and retention - ITN actively recruits volunteers and markets their program in a variety of ways, including its "Look who's Driving Now" program and a Volunteer of the Year Award. The former involves ITN's recruitment of a prominent citizen such as a legislator or sports figure to serve as a volunteer driver. Once recruited, ITN actively publicizes this individuals participation. Press coverage provides free publicity which is valuable in recruiting new volunteers. ITN also collaborates with other organizations, such as AAA and local communities to recruit volunteers. Finally, ITN works to generate free press coverage/publicity for the program by sharing personal success stories and creating photo opportunities, which serve to raise interest in and create awareness of the program.

Ms. Freund advised against paid advertising as a means to acquire volunteers and emphasized that the ITN's public relations efforts revolve around fostering and maintaining a positive, reciprocal relationship with the media. The type of social marketing ITN focuses on involves conveying and repeating a simple message in a multi-media format. Inciting guilt among potential volunteers is not ITN's strategy; instead, the focus is on creating a personal connection to the work ITN is doing and the clients being served.

Interested volunteers are screened by ITN. The application process entails completing an application, a personal interview and submission of three references. Volunteer drivers must have three years of driving experience, pass a road test and have a clean driving record. Information related to the potential volunteer's vehicle is also investigated. For example ITN checks vehicle registration and insurance information and makes sure the volunteer's vehicle is appropriate for the clients to be served (e.g. vehicle condition, door height, etc).

ITN strives to retain its volunteers by rewarding and acknowledging their service with programs and practices such as giving annual awards and holding events such as the trash can turkey roast. Volunteers also receive birthday cards and email notes. Ms. Freund reported that ITN's volunteer staff, particularly their volunteer coordinator, has been a valuable component of the program.

In summary, Ms. Freund remarked that ITN considers volunteer drivers an essential element of senior citizen transportation initiatives. The marketing, recruiting and recognition of program volunteers is an on-going process and should be built into an organization's structure. She added that maintaining a professional staff is cost effective and valuable to a volunteer transportation program, as is utilizing information system technology.

Copies of Ms. Freund's slides are included in Appendix 1.

Volunteer Friends: Innovations, Challenges, and Adaptations

Helen Kerschner, Ph.D., executive director at the Beverly Foundation, was the second speaker. She explained that the Beverly Foundation is a non-profit organization located in Pasadena, California with 25 years of research experience on issues related to improving the quality of life for senior citizens. Senior mobility is a main focus for the foundation and they strive to develop and promote new and/or innovative strategies for achieving "senior friendly" mobility and transportation options.

Ms. Kerschner reported that current range of transport options for senior citizens includes public transit, light rail transit, subways, community shuttles, paratransit, taxi services and specialized transit, among other options depending on location. However, she observed that there are a variety of institutional, "people" and population obstacles related to transportation services. For example, with regard to institutional problems, an agency/organization providing transportation may lack an awareness of the special needs of seniors, not possess adaptable vehicles, have limited funds and/or focus their efforts on serving the general population. "People" problems might include a senior's, inability to walk to a transit stop, personal safety concerns and the inability of some seniors to pay the cost of services. Population issues might include the growing number of seniors in need of transport options and the increasing diverse nature of their needs.

Ms. Kerschner noted that the 65-84 age cohort and the 85+ population are expected to increase 50 and 52 percent respectively by 2030, from the 2000 population figures. Thus, the need for viable senior transportation options is escalating and will continue to do so in the foreseeable future. In this environment, she reported that the Beverly Foundation has determined the 5 "A's" of senior friendly transportation as Availability, Accessibility, Acceptability, Adaptability and Affordability. The Beverly Foundation has explored a variety of strategies to address the 5 "A's" through initiatives such as the Innovations study, focus groups and the STAR search survey.

The foundation's ***Innovations study*** involved a partnership with the Community Transportation Association of America (CTAA) to identify innovations for seniors in public and paratransit. The research approach involved internet research on available options, a national mail survey, data analysis and identification of innovations. The study resulted in an Awards for excellence in innovation award program and a database of identified innovations to be shared with public and paratransit providers nationwide.

During the course of the study, some of the research team's early assumptions were proven false. For example, one research hypothesis was that the main complaint of seniors was that they were not getting where they need to go. However, researchers found that seniors were more concerned about the hours of available services, limited service areas, advanced scheduling requirements, lack of personal assistance on transit and the fear of being stranded. Another research hypothesis was that lack of information was the key problem in seniors accessing service. However, seniors reported that things like traveling at preferred times, not understanding how transit

works, wait time for rides, paying for rides, scheduling rides and getting on/off vehicles were the main problems in accessing service. Finally, although researchers hypothesized that major vehicle modifications would be needed to better serve the senior population, it turned out that issues such as driver training, scheduling and route changes were more important. The research team was correct in their assumptions that the seniors with the greatest needs were those age 85+ and that service innovations designed to meet the needs of seniors could improve services for everybody.

Ms. Kerschner reported that several themes emerged from the consumer needs surveys conducted as part of the study. These are summarized as follows:

Service area	multiple communities
Service method	transportation provider or broker
Service type	demand response, paratransit, ADA paratransit
Vehicles used	multiple vehicles (bus, van)
Service approach	door-to-door
Reservations	same day, 24 hr advance, subscription
Most frequent trips	medical (then shopping)
Major modifications	allowing driver to go door-to-door
Service improvement	expansion of services to seniors
Community support	volunteer involvement

In addition to the Innovations study, the Beverly Foundation worked with the American Automobile Association (AAA) Foundation for Traffic Safety to conduct focus groups on senior driving. They also partnered with AAA to initiate ***STAR search*** which involved a national survey designed to inventory Supplemental Transportation Programs for Seniors (STPs) and grant awards for to those programs deemed exemplary. Recent recipients of STAR awards include Ride Connection (Portland, OR), T.R.I.P. (Riverside, CA) and Gadabout (Ithaca, NY).

From the STAR surveys, the Beverly Foundation obtained a wealth of valuable information about current STPs. For example, 61 percent of the trips provided by these programs are for medical appointments, with social activities accounting for 42 percent of trips. 71 percent of the programs surveyed offer door-to-door service and 19 percent offer curb-to-curb service. 42 percent of programs use paid drivers only, 34 percent rely upon volunteers only and 20 percent use both volunteers and paid drivers. With regard to vehicles, 50 percent of programs surveyed use vans, 42 percent autos, 29 percent buses and 6 percent taxis. Finally, 47 percent of programs surveyed can provide escorts.

Ms. Kerschner also described the ***PasRide*** initiative, an 18-month Beverly Foundation pilot program in Pasadena, California. The program which was completed in August 2003, involved design and implementation of a new transportation service for seniors that complemented existing transportation services in a flexible and adaptable manner. PasRide included the best features of STPs inventoried as part of the STAR suvey.

Ms. Kerschner described PasRide as a program designed with a "volunteer friends" approach to transportation. It is a low cost, low maintenance, consumer driven, senior friendly approach to providing transportation to seniors. The primary components of the model include a sponsor (community agency), partners (local service organizations), riders (seniors) and drivers (friends of riders). Riders make their reservations directly with volunteer drivers which they recruit themselves. The vehicles used to provide service are owned by the volunteer drivers. Volunteer staff is used to administer the program and there is limited program infrastructure.

Ms. Kerschner emphasized that the model "empowers" seniors by giving them the funds to reimburse their drivers. No rider fees are charged, drivers are screened, service is provided door-to-door or door-through-door and service is available daily. Overall, the volunteer friends model is premised upon and the PasRide system is guided by the 5 A's of senior friendly transportation mentioned above – availability, accessibility, adaptability, acceptability and affordability.

To participate in the PasRide program volunteer drivers must possess their own insurance and carry excess auto liability, accidental driver and volunteer liability insurance. Trip reimbursement methods are as follows: $2.50 per trip for intra-city travel, 30 cents per mile for inter-city travel and a flat rate of $24 per month for long-distance travel.

Lessons learned from PasRide include the following:

- Liability & risk must be determined from the "get-go".
- Insurance costs do not need to be a barrier to action.
- A transportation service does not have to be expensive.
- It is not necessary to purchase vehicles or hire staff.
- Riders can recruit their own drivers and schedule rides.
- Volunteer friends are willing to drive when someone asks them.
- A variety of partners & advisors contribute to the agenda.
- A program like PasRide needs to supplement – not replace existing transportation services.
- The PasRide concept is hard to get across to people.
- PasRide can be adapted in a variety of ways.

Ms. Kerschner stressed the important role played by volunteers in the PasRide pilot and in senior transportation overall. She described volunteers as the "hope for the future." She explained that volunteers are typically family members, friends and neighbors who drive riders from point to point and/or play the role of escort, help schedule rides or train other drivers. Ms. Kerschner remarked that while it can be a challenge to recruit volunteers, once recruited, volunteers generally stay with the program. Potential volunteers can be recruited from a variety of places, including religious groups, senior centers, social service agencies, volunteer groups and agencies, universities, local government and public and paratransit services. In order to successfully recruit a volunteer base, Ms. Kerschner advised understanding the motivations of volunteers, which often include a desire to meet people, make a contribution and/or be reimbursed for services.

When recruiting volunteers, it is important to make clear what will be expected of them as volunteers. For example, volunteers should be notified if they must use their personal vehicles, how to obtain the mandatory insurance and if they need to take any training courses. Drivers must also be made aware that they must share documentation, such as their driving record with the sponsoring agency. In terms of responsibilities, volunteers must be notified if they are expected to act as an escort to riders or if they are limited to dropping off and picking up their riders. If door-to-door service or door-through-door service is expected, volunteers need to be made aware of that expectation.

Management of volunteers is also crucial. Ms. Kerschner recommended that potential volunteers be screened as part of any application process. She added that volunteers accepted into a program should be given training and a handbook about the program. Criteria for success should be discussed and volunteers should also sign a contract which clearly states responsibilities and expectations. Logistical support, evaluation and recognition from the sponsoring agency are also key to the successful management of volunteers. Volunteers should also be given an opportunity to provide feedback so that concerns and/or problems can be shared and addressed. Overall, Ms. Kerschner emphasized that adult and senior volunteers are plentiful in the United States, but they must be successfully recruited and managed in order to achieve longstanding relationships. Currently, the Beverly Foundation is conducting a STAR search for volunteer drivers, as one way to highlight the importance and success of senior transportation volunteers.

To conclude her presentation, Ms. Kerschner invited participants to access the Beverly Foundation's website at ***www.beverlyfoundation.org***, if interested in exploring their online Senior Transportation Options Repository (STORe). STORe offers a wealth of information on senior mobility topics, including traditional and supplemental vehicle and transportation options for seniors and senior care and services. She also highlighted the Volunteer Friends TurnKey kit, which offers generic materials to be used in planning, implementing and evaluating a volunteer friends transportation initiative.

To answer the question "what can participants do to improve the state of senior mobility?" Ms. Kerschner recommended that available transportation options be identified and strategies to improve the senior friendliness of those options determined. In addition, exploring ways to incorporate transport options into the lives of senior citizens before they experience a "crisis" is critical.

Copies of Ms. Kerschner's slides are included in Appendix 1.

Wheels of Wellness – Volunteer Division

The next speaker was **Timothy Puglia**, software developer at the non-profit Wheels of Wellness organization, located in Philadelphia, Pennsylvania. Wheels was founded in 1959 to provide free, non-emergency medical transportation for the needy ill and disabled and is the oldest and largest volunteer transportation agency in the country. The organization began by using only volunteer drivers but, since the late 1960's, it has increasingly relied upon paid drivers. Currently, Wheels has 40 volunteer drivers and 5 paid drivers. No distinction is made between paid and volunteer drivers in terms of scheduling rides, except that volunteer drivers are permitted to choose the times and areas in which they would prefer to drive. Paid drivers fill the gaps in service. All riders using Wheels services must be ambulatory.

Funding for the organization comes from a variety of sources, including the United Way, fundraising events, foundations and businesses/industry. Volunteer drivers must have a clean driving record and exhibit compassion for their riders. They must also use their own personal vehicle at their own cost. Volunteer drivers are not required to receive training, unless they are medical assistance drivers. Overall, Mr. Puglia stressed that Wheels does not want to discourage potential volunteers by requiring training. However, all volunteers are given training materials and are invited to attend training sessions if they desire. When a volunteer begins work, he/she must go on a ride-along with another driver.

Volunteer compensation includes either a letter attesting to the individual's service to be used by the individual for tax purposes or mileage reimbursement (31 cents per mile). Mr. Puglia reported that most volunteers choose to take the tax letter.

Finally, with regard to insurance, Mr. Puglia explained that drivers must have a personal auto insurance policy as their primary coverage. Wheels provides secondary coverage, which is an umbrella policy that covers costs over and above that of the driver's own policy. He reported that in Wheels' 40+ years of operation, there have been only two insurance claims.

Copies of Mr. Puglia's slides are included in Appendix 1.

Hunterdon County Volunteer Driving Program

Tara Braddish, executive director of the Hunterdon Area Rural Transit (HART) Transportation Management Association (TMA), was the next speaker. Ms. Braddish explained that Hunterdon County has approximately 122,000 residents, 32 percent of whom are seniors. The County has no public transportation or taxi service and is predominately rural/suburban, with a few small towns. In 1985, all special needs transportation funding was pooled by the County Department of Human Services to fund the LINK bus system. The LINK system offers demand and modified fixed route service for in county travel to all county residents. Approximately 30 vehicles are used to provide the over 700 daily trips.

In the early 1990's, the Hunterdon County Volunteer Driver program was initiated by the county's Office on Aging to supplement the services offered by the LINK system. The program was initially staffed by eight volunteers from the Men's Rotary Club. When conceived, it was determined that the primary unmet need was senior medical appointment trips. As a result, the Volunteer Driver program principally provides trips for seniors and disabled residents who need to access medical treatment both in and out of county on weekdays. Two county vehicles are available for the program and the program is limited to assisting two clients per day. Currently, the program operates with an average of 13-15 volunteers. Other program guidelines are as follows:

- Trips are only provided to riders unable to use the regular LINK service.
- Trips are provided for medical transport only.
- Volunteer trips are strictly "single purpose" trips - no stops, but prescription pick-up is permitted.
- Clients must be ambulatory, no wheelchairs.
- Limit of 2 trips per month per client.
- An insured county vehicle is provided for use by the volunteer drivers.
- Volunteers must have a valid driver's license.
- Volunteers must have a physical exam by the county doctor.
- Scheduled trips may not exceed 75 miles one way.
- Suggested donations for service are $2 in county, $4 out of county.
- Clients are responsible for any parking and toll costs.

Ms. Braddish reported that the program attempts to achieve a personal approach to recruiting and maintaining its volunteer base. Volunteers are generally recruited from service clubs, community organizations, religious groups and the county Office on Aging. Interested volunteers not affiliated with an organization may volunteer by providing two character references. Interested volunteers must complete an application and the County of Human Services then requests a MVC license check of all volunteers to determine eligibility. Once driving credentials are verified, eligible volunteers must

agree to have a physical examination with the County physician prior to being selected as volunteers and listed on the program's "call list".

Volunteer orientation begins with review of the program's "9 point policy", which outlines the program's purposes and various guidelines such as the need for volunteers to do the following: immediately report accidents to the County Transportation Office; report to the Transportation Office to receive trip information and vehicle keys; and only use County vehicles. Volunteers are also advised during orientation of the need for compassion and understanding towards riders. The procedure for collecting donations via envelopes is explained to volunteers, use of logs is reviewed and volunteers are made aware of details about the County vehicle they will be driving.

With regard to program delivery, trips originate through the LINK Central Dispatch and all requests are screened to determine type of medical appointment. Outpatient surgery transport is determined on a case by case basis. Notification of ride varies, but averages one week in advance. The number of trips also varies, averaging 8-15 per month. The typical scenario on the day of transport is as follows: the driver picks up the County vehicle and client information. A window sign is provided for drop offs/handicapped parking. The driver completes the trip manifest log and picks up the client, noting any special issues and provides the client with the donation envelope. Finally, the driver returns the vehicle, donation envelope and log to the County Department of Human Services following trip completion.

Use of the service has been growing, with 169 hours of service and 17 unduplicated clients in 2000 and 409 hours of service and 44 unduplicated clients in 2003. More recently, through August 2004, 314 hours and 38 unduplicated clients have been logged. Ms. Braddish reported that there are many reasons for the initiative's success, including the support given to senior services by the Board of Chosen Freeholders, the spirit of volunteerism exhibited among County residents, the well organized LINK Dispatch office, clear program requirements and expectations, the personalized approach to recruiting volunteers and volunteer recognition activities.

Copies of Ms. Braddish's presentation slides are included in Appendix 1.

Volunteer Insurance and Risk Management

Sue Dowling, executive director of the Interfaith Network of Care, Inc., was the final speaker. Ms. Dowling reported that her volunteer organization, which is located in Middlesex County, New Jersey, provides personal and social support to those coping with disabilities, chronic conditions and other age-related disabilities by providing friendly visits, phone calls, assistance with grocery shopping, chores/yard work, paperwork and transportation to non-emergency medical appointments.

The organization has 250 total volunteers, with 55 active volunteer drivers. Ms. Dowling is the program's only full-time employee. The organization has a part-time volunteer coordinator who recruits volunteers throughout the community. Many volunteers are 75-80 years old. However, student volunteers are also recruited from Rutgers University.

With regard to volunteer insurance, she explained that the organization purchases its insurance from a company located in Virginia, named CIMA Companies, Inc. The organization pays approximately $2,500 to $3,000 annually for volunteer insurance. They also provide oil changes for their volunteers' vehicles, which costs approximately $850 annually. Ms. Dowling reported that in the organization's eight year history, they have had no claims made against their insurance policy. In terms of advise to those seeking volunteer driver insurance, Ms. Dowling recommended that organizations review their current insurance plans and then determine what additional coverage is needed. In addition, she advised making volunteer drivers aware of any limitations on the organization's insurance coverage.

PARTICIPANT DISCUSSION

Participants shared the following comments and questions during the facilitated discussion that followed the speaker presentations:

- A participant asked Ms. Freund for information about the software system employed by ITN*America.* Ms. Freund reported that ITN*America* identified the need for an affordable custom software system, since the systems available for purchase are typically designed for paratransit services. The organization consequently spent approximately four years building a new software system. Components of the system include dispatch, finance, volunteer management and marketing/fundraising.

- A participant requested information about the collaboration activities between ITN*America* and the American Automobile Association (AAA) of New England. Ms. Freund reported that ITN approached AAA approximately six months ago to encourage collaborative efforts between the two organizations, especially to help ease the transition for seniors from driving to non-driving. Ms. Freund remarked that working with AAA is valuable because many ITN members are also AAA members. Elements of the partnership between the two entities include providing links to one another's website, offering discount ITN membership for AAA members and offering classes/workshops. AAA also provides ITN with a venue for volunteer recruitment.

  Ms. Kerschner added that the Beverly Foundation collaborates with the AAA Foundation for Traffic Safety, as AAA has been directing significant funding in recent years to research examining alternate forms of transportation and options for seniors.

- In response to a question asking if drivers on the road can be reached by the central ITN office, Ms. Freund responded affirmatively, noting that volunteers typically have cell phones and paid drivers utilize a two-way radio for communication.

- A participant asked Ms. Freund about ITN trip costs and average ride times. She responded that the average trip cost is $13.71, with fare covering about $7.67. ITN fundraising generally covers an additional $5 per ride. Ms. Freund noted that the Road Scholarship Fund assists low income riders in paying for their trips. With regard to the time of the average ride, she reported that ITN provides both short and long distance trips. Shorter rides usually require 20 minutes and a longer trip could take one hour or more.

- One participant asked Ms. Braddish what her opinion was of expanding the service offered by the Hunterdon County Volunteer Driver program to include "quality of life" trips for seniors, in addition to the medical transportation currently available. Ms. Braddish responded that the County has a comprehensive system offering rides that meet social needs, via the LINK system's demand response and modified fixed route services.

- A participant sought clarification on Ms. Braddish's statement that Hunterdon County's Volunteer Driver program does not schedule trips that exceed 75 miles one way. Ms. Braddish responded that Hunterdon County is a rural area and thus, trip mileage is often significant. Further emphasizing her point, she added that the service has provided trips to the New York City and Philadelphia areas. Ms. Freund added that providers serving rural areas must expect to travel long distances and shared ITN's experience of traveling 250 miles for a rider seeking medical services who resided in rural Maine.

  In a related question, one participant inquired if transportation organizations can claim a tax deduction for volunteer time, as well as vehicle mileage. It was reported that deductions can only be taken for mileage and not volunteer time.

- In response to a question about insurance providers, Ms. Freund reported that the plan offered by the CIMA company described by Ms. Dowling is effective if the organization does not charge riders a fare and if it operates without paid drivers. ITN does not use CIMA, as they do charge a fare and utilize paid drivers, in addition to their volunteer drivers. She reported that ITN's insurance costs $1,500 per year for the volunteer liability umbrella and $3,300 per year for each vehicle they own that provides services.

- Ms. Freund was asked if the seniors utilizing the ITN service have expressed the opinion that they should not have to pay a fare for their rides. Ms. Freund explained that the issue is not willingness to pay on the part of the rider, but

rather willingness of organizations to charge for rides. As was evidenced in today's forum presentations, all programs discussed by presenters except for ITN, do not charge riders for trips. Donations may be requested, but there are no mandatory rider fees.

Ms. Freund explained that her philosophy on this issue differs from Ms. Kerschner's opinion. Ms. Freund elaborated that if ITN did not charge riders for their trips, the organization would be faced with a greater fundraising burden. The funds provided by riders also allow for increased service. In addition, she stressed that there is dignity in taking care of oneself and as long as a program is in place – such as the Road Scholarship fund – to provide rides to those who truly cannot afford transportation, then charging for rides is a fair practice. Overall, Ms. Freund noted that organizations should not make the assumptions that all elderly cannot afford to pay for transportation. In contrast, Ms. Kerschner explained that charging for rides has drawbacks, including insurance impacts. In addition, she noted that fees can be obtained from riders in the form of donations. Ms. Dowling added that based on her experiences with the Interfaith Network of Care, Inc., seniors are aware of the value of rides and frequently send donations of $20 or more for the trips they receive from the organization.

On a related note, Ms. Freund was asked what low-income threshold is relied upon by ITN when determining if a rider can afford to pay for his/her trip. Ms. Freund was uncertain of the exact figure, but stressed that the ITN system is premised on trust and thus, if a rider explains that he/she needs the ride but cannot pay the cost of the ride, ITN will still provide the service to that individual.

- One participant inquired about typical screening procedures for potential volunteers. It was reported that screenings usually involve background checks into the individual's criminal history and driving record. Criminal history background checks are not free and can cost $35 or more per check.

SPEAKER BIOGRAPHIES

TARA BRADDISH

SUE DOWLING

KATHERINE FREUND

HELEN KERSCHNER

TIMOTHY PUGLIA is a software developer at Wheels of Wellness, where he has been employed for approximately three years. One of his primary job functions is to maintain the volunteer division's technology needs, and he has worked on initiatives to modify their scheduling software and design new fundraising software. Through his work, Mr. Puglia has gained a thorough understanding of how the volunteer division operates and frequently prepares and gives presentations about the Wheels of Wellness organization to various groups.

Safe Mobility at Any Age
Policy Forum Series

Forum 5
September 28, 2004

Community Transportation Alternatives
Utilizing Volunteers to Provide Passenger Car Transportation for Seniors and the Disabled

AGENDA

9:00 **Registration and Continental Breakfast**

9:30 **Welcome**
Grace Egan, Executive Director, NJ Foundation for Aging

9:40 **Effectively using a volunteer supported passenger car system**
Katherine Freund, Executive Director, ITN, Independent Transportation Network, Portland- Westbrook, Maine

10:15 **Empowering seniors and the disabled using volunteer supported transit programs**
Helen Kerschner, Ph.D., Executive Director, The Beverly Foundation-
10:50 PasRide, Pasadena, California

Break

11:00 **Wheels, America's oldest and largest volunteer medical transportation agency**,
Timothy Puglia, Software Developer, Wheels, Inc, Philadelphia, PA

11:30 **Using County vehicles with volunteer drivers for medical transportation**
Tara Braddish, Executive Director, HART, Flemington, NJ
Marian Herman, Volunteer Coordinator, Hunterdon County Volunteer Transportation Program, Flemington, NJ

12:00 **Volunteer Insurance and Risk Management,**
Sue Dowling, Executive Director, Interfaith Network of Care, Inc.
With Some Comments from Helen Kerschner

12:20 **Question & Answer and Facilitated Discussion with the Panel of Presenters**

LIST OF PARTICIPANTS

First	Last	Organization
Elizabeth	Adams	Warren County Division of Senior Services
Karen	Alexander	Issacs Center
Rosemarie	Anderson	Delaware Valley Regional Planning Commission
Morteza	Ansari	Keep Middlesex Moving, Inc.
Peter	Bilton	Greater Mercer TMA
Donald	Boeri	Casino Revenue Fund Advisory Commission
Johnathan	Bonanno	Am Red Cross-Bergen
Tara	Braddish	Hunterdon Area Rural Transit
Sandra	Brillhart	Greater Mercer TMA
Jon	Carnegie	Voorhees Transportation Center
John	Ciaffone	TransOptions, Inc.
Adele	Clark	Greater Mercer TMA
Serena	Collado	Somerset Medical Center
John	Connors	Hudson Co AAA
Richard	Dalfonzo	Monmouth Co. Office on Aging
Martin J.	De Nero	Mercer County Trade Transportation
Sue	Dowling	Interfaith Network
Grace	Egan	NJ Foundation for Aging
Pam	Fischer	AAA - NJ Automobile Club
Katherine	Freund	ITN*America*
Caroline	Granick	Middlesex County Planning Department
Janet	Hansen	Rutgers-CAIT-LTAP
Susan	Harris	Metro Transport at Daughters of Israel Nursing Home
Marianne	Herman	
Rosaria	Ippolito	Meadowlink Commuter Services
Helen	Kerschner	The Beverly Foundation
Katherine	Klotzburger	The Silver Century Foundation
Madaline	Koenan	Warren County Division of Senior Services
Robert	Koska	NJ TRANSIT Corp.
Joan	Kuntne	Middlesex Co. Area Wide Transportation
Peggy	Lanni	City of Bayonne Office on Aging
Edward	Lipiner	Passaic County Planning Department
Andrea	Lubin	Voorhees Transportation Center
Jerome	Lutin	New Jersey Transit
Pam	Maiolo	AAA-Mid-Atlantic
Ashley	Marchowsky	Atlantic County Intergenerational Services
Christian	Marquez	Chilton Sports Med. & Rehab.

Henry	Nicholson	County of Monmouth Department of Transportation
Ken	Oexle	United Way of Morris County
Jennifer	Palasits	JFK Johnson Rehab. Institute
Jill	Parham	CAIT-LTAP
Tim	Puglia	Wheels of Wellness
Nancy	Reger	
Rick	Remington	Voorhees Transportation Center
Martin	Robins	Voorhees Transportation Center
Kathleen	Seaman	NJDHSS - Division of Aging and Community Services
Karen	Smith, OTR	Somerset Medical Center
Loren	Staplin	TransAnalytics, LLC
Lynn	Thornton	NJ Association Senior Center Directive
Erin	Toomey	Somerset County Office of Aging
Judy	Truman	CC Office on Aging & Disabled
Kim	Van Pelt	NJ Foundation for Aging
Theresa	Vansant	C.C. Office on Aging & Disableld
George	Ververides	Middlesex County Dept. of Planning
Herman	Volk	Office of Smart Growth
Charles	Volpe	Warren County Division of Senior Services
Florence	Volpe	C.C. Office on Aging & Disabled
Kevin	Wegner	JFK Johnson Rehab. Institute
Caroline	Willner	Warren County Division of Senior Services
Pippa	Woods	Voorhees Transportation Center
Karen	Yunk	Federal Highway Administration - New Jersey Division
Diane M.	Zane-Stephens	S.C.U.C.S., Inc.

APPENDIX 1

PRESENTATION SLIDES

Surviving without Driving: Creating Sustainable Transportation for Seniors
Katherine Freund, Executive Director
Independent Transportation Network (ITN*America)*

Volunteer Friends: Innovations, Challenges and Adaptations
Helen Kerschner, Ph.D, Executive Director
The Beverly Foundation – PasRide

Wheels of Wellness – Volunteer Division
Timothy Puglia, Software Developer
Wheels of Wellness

Hunterdon County Volunteer Driving Program
Tara Braddish, Executive Director
Hunterdon Area Rural Transit (HART)

Surviving Without Driving:

Creating Sustainable Transportation for Seniors

Katherine Freund

ITN*America*™

New Jersey Foundation for Aging

Volunteers: We Couldn't Do It Without Them

New Brunswick, New Jersey

September 28, 2004

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ITN*America*™ Volunteer Fact Sheet

July 1, 2003 to June 30, 2004

- Current active volunteers—50
- Gender—29 male; 21 female
- Age—mean = 58; median = 63
- Total recruited this year—20 (15 active)
- Total recruited ever—232
- Volunteers who gave miles away
  - Occupied miles: 34/50 = 68 %
  - Unoccupied miles: 23/50 = 46 %

The Dollars & Cents of Using Volunteers

July 1, 2004 to June 30, 2004

- **$117,158**—total revenue from rides—15,274
  - **$76,805**—revenue, paid drivers (9897 rides; 65 %)
  - **$40,352**—revenue, volunteer drivers (5377 rides; 35 %)
- **$10,827**—total volunteer mileage reimbursement value
  - **$2,533**—miles Donated to Community Road Scholarship
  - **$4,998**—miles donated to ITN
  - **$1,545**—miles donated to Road Scholarship Fund
  - **$ 647**—volunteer Miles given to customers
  - **$9,722**—total given away

Characteristics of Seniors Using Alternative Transportation

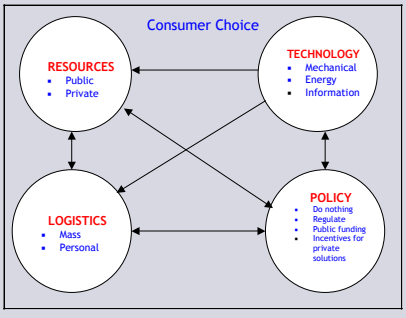
- Geographically dispersed—suburban
- Traditional Public transit—difficult to use
- Need assistance—curbs, packages, seatbelts, doors
- Willingness to pay—ability to pay

Using Volunteer Drivers Efficiently: The Logistics of Senior Transportation

- Low technology approach—classic model escorted rides
- High technology model—efficiency and effectiveness through information system management

Basic Components of Transportation

Primary Elements **Primary Forces**



How ITN*Rides!* Manages Volunteer Information

- Manage volunteer accounts
  - Records miles and volunteer credits
  - Transportation Social Security
  - Donations—Road Scholarship Program
  - Reports reimbursement
- Manage volunteer logistics
  - Manages availability—hours, days, vacations
  - Remembers attributes—location, vehicle characteristics
  - Matches volunteers with seniors who need rides
  - Creates rideshares
- Manage volunteer activities
  - Driving
  - Office, stuff mailings
  - Community Teas
- Connects volunteers to other volunteer programs

ITN*America*™
Techniques to Recruit Volunteers

- Modeling volunteer behavior
  - Look Who's Driving Now
  - Volunteer of the Year Award
- Collaborating with others
  - Community Road Scholarship Program
  - GilesMiles
  - Time Dollar Network
  - AAA Northern New England
- Creating stories
  - Personal stories
  - Action, photo opportunity

GilesMiles

Volunteer Driver Martha Giles
1995 to present: 8,000 rides

Look Who's Driving Now

State Legislator Darlene Curley

ITN*America*™
Marketing Tips to Recruit Volunteers

- Paid advertising—don't do it
- Multi-media—use multi-directional, multi-level messages in all media
- Simple—clear messages and clear actions
- Repeat—repeat, repeat, repeat

ITN*America*™
Programs to Reward Volunteers

- Annual awards—Max Israelite Volunteer of the Year Award
- Annual events—trash can turkey roast
- Anniversary "thank you's"
- Birthday cards
- E-letters

Volunteer of the Year Award

Joan Peet 2004

Transportation Social Security: Creating Volunteer Equity ITN*America*™

- Save for future—personal transportation planning
- Charitable gifts
  - Donate to Road Scholarship Program
  - Donate to favorite group
  - Donate to Community Road Scholarship program
  - Donate to ITN
- Personal gifts—give to family and friends

Volunteer Staffing

- It's worth it
- VISTA Americorps program
- Grant funded coordinators

ITN*America*™ Screening Volunteers

- Application—personal interview & 3 references
- Vehicle information
  - Legal—registration, insurance, inspection
  - Mode—doors, truck, height, condition
- Skill—road test
- Qualifications—experience and age

Summary

- Volunteers are essential
- IS Technology is highly beneficial
- Professional staff is cost effective
- Marketing, recruiting, rewarding volunteers is on-going

Contact Information

Katherine Freund

President & Executive Director

ITN*America*™

207 854-0505

Kathy.freund@itnamerica.org

www.itnamerica.org

Senior Transportation

Presentation
September 28, 2004

Volunteer Friends
Innovations
Challenges
Adaptations

Helen Kerschner

The Beverly Foundation
Located in Pasadena
25 Years of Experience
Quality of Life Emphasis
Research and Demonstration

Agenda
Older Adults → Mobility
Older Adults → Transportation

Theme
to stay in the community
seniors (and their caregivers) need "senior friendly" mobility and transportation options

STPs

Themes

#1 Importance of Options
- Options For The Transportation Dependent
- What's Senior Friendly

#2 Innovations In Public & Paratransit
- Characteristics and Assumptions
- Innovations of Excellence

#3 Volunteer Solutions
- Low Cost/Low Maintenance
- *Volunteer Friends*

#4 What Are The Next Steps
- A TurnKey Kit
- Other Resources
- A Call To Action

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Options Are Out There

There Is A Template
The Public & Paratransit Options
Institutional Problems
People Problems
Population Problems
What Do We Know?
Not "Senior Friendly"

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A Template of Options

Automobile Options
Driver training programs
Driver assessment programs
Driver rehabilitation programs
Behind the wheel driver training

Public Transit
Busses
Light Rail Transit
Subways
Community shuttles
Neighborhood jitneys

Paratransit
Demand-Response programs
Dial-a-ride programs
Subscription services

Private Transit
Taxi services
Independent driver services
Limousine and driver services

Specialized Transit
Hospital based transit programs
Shuttles (to shopping and services)
Senior Center transit
Adult Day Services transit

Pedestrian Transit
Pedestrian safety programs
Pedestrian training programs

Information and Referral
Mobility Managers
Information & referral programs

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Institutional Problems

Providing Options Isn't Simple

- philosophy of serving the general population
- don't view seniors as different than anybody else
- lack of awareness of special needs of seniors
- funds are limited
- vehicles are not adaptable
- services are both high cost and high maintenance
- services aren't coordinated
- services are narrowly focused
- staff is unprepared
- environment is difficult for service delivery

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People Problems

Seniors Can't Always Use Options

- unaware of existing options
- can't walk to the bus stop
- unable to wait in hot sun
- unable to travel for long periods of time
- in need of assistance from escorts
- fearful of getting lost
- afraid of falling
- unable to pay the costs
- concerned about safety
- can't get to the fun things in life

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Population Problems

The "Old Old" Will Need Options

	Total Population	65 - 84 Population	85+ Population
2000 Total	275,306,000	30,523,000 (11%)	4,312,000 (1.6%)
2030 Total	351,070,000	61,388,000 (17%)	8,931,000 (2.5%)
Change	22%	50%	52%

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What's Senior Friendly

"Senior Difficult"	"Senior Friendly"
too far	availability
too high	accessibility
too inconvenient	acceptability
too rigid	adaptability
too costly	affordability

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Adapting Public & Paratransit

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Study Of Innovations

The Project

Partnership Between CTAA & Beverly Foundation

The Approach

#1 Inquiry through networks (internet) → #2 Survey of Respondents (mail out) → #3 Data entry, analysis and results (data base) → #4 Identification of innovations (57% response) → #5 Awards for Excellence (3 winners)

The Result

Innovative ways of improving transportation services for seniors

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Assumptions

#1 Complaint of Seniors - *not getting where need to go* — WRONG
- advance scheduling requirements
- hours of service
- limited service area
- being stranded
- no help with transit

#2 Particular Problem Accessing Service – *lack of information* — WRONG
- 40% traveling at preferred times
- 25% paying for rides
- 37% not understanding how works
- 24% scheduling rides
- 31% waiting for vehicle
- 21% getting on/off vehicle

#3 Seniors with Greatest Needs – *85+ age group* — RIGHT

#4 Major Modifications (changes) – *vehicles* — WRONG
- 73% driver training
- 67% scheduling
- 73% allowing driver through door
- 47% route changes

#5 Innovations For Seniors – *would improve for everybody* — RIGHT
- 72% improved as whole
- 71% applied to other groups

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10 Common Themes

Area Covered	multiple communities
Service Method	provider, broker
Service Type	demand response, partransit, ADA paratransit
Vehicles Used	multiple vehicles (bus, van)
Service Approach	door-to-door
Reservations	same day, 24 hr advance, subscription
Most Frequent Trips	medical (then shopping)
Major Modifications	allowing driver to go to door
Service Improvement	expansion of services to seniors
Community Support	volunteer involvement

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STPs Research

Focus Groups: 22 Groups – 3 States
(Drivers, Non Drivers, Caregivers)

STAR Search: 4 National Surveys (2000-2003)
400+ STPs Identified & Analyzed
18 STAR Awards For Excellence
2 Reports

Purpose
- 61% medical appointments
- 42% social activities
- 35% any purpose
- 20% essential trips

Service Type
- 71% door-to-door
- 19% curb-to-curb
- 10% fixed route
- 10% door-thru-door

STPs

How Are They Unique?

Drivers
- 34% volunteers only
- 20% mix of volunteer and paid
- 42% paid only

Vehicles
- 50% vans
- 42% autos
- 29% busses
- 6% taxis

Escorts
- 47% can provide escorts
  - 71% door to door
  - 10% door thru door

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Volunteer Involvement

STAR Search Programs of Excellence

Ride Connection (Portland, OR) - $5,600,000
Gold Country Telecare (Grass Valley, CA) - $810,000
Gadabout (Ithaca, NY) - $641,000
Independent Trans Network (Portland, ME) - $250,000
T.R.I.P. (Riverside, CA) - $395,000
West Austin Caregivers (Austin, TX) - $56,000
Shepherd's Center (Kalamazoo, MI) - $9,000

PasRide (Pasadena, CA) - $15,000

"Thank Goodness for Volunteers"

STPs

Volunteer Friends & PasRide

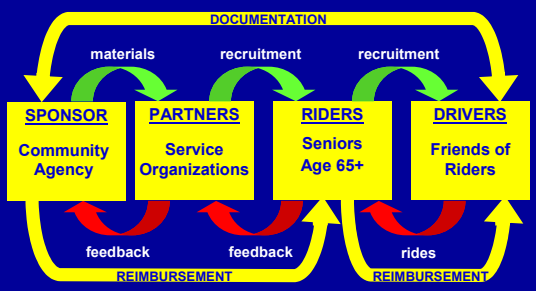
The *Volunteer Friends* Model
Low Cost – Low Maintenance
PasRide Pilot
Risk Management & Ins
Reimbursement Plans

Is It Really Innovative?

"Volunteers"

STPs

Volunteer Friends Model



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Cost/Maintenance Approach

Transportation Service

Low COST

Low MAINTENANCE

- Volunteer Drivers
- Volunteer Vehicles
- Volunteer Staff
- Limited Infrastructure
- No Ride Scheduling

STPs

PasRide: The Pasadena Pilot

Purpose

Demonstrate a Flexible Service Model (Low Cost/Low Maintenance)
Demonstrate an Adaptable Process Model (Anybody Can Do It)

Design

"Best of the Best" Features of STPs
Volunteer Oriented
Community Focused
Senior Friendly Approach (the 5 As)

Location & Time Frame

Pasadena, California
18 months

STPs

Insurance Coverage

Organizational Insurance

- Liability
- Personal Property
- Directors

Assets, Reputation
Board, Employees
$125.00

Transportation Program Insurance

Organization	Volunteer
Liability $1,680	Excess Auto Liability - $231
	Accidental Driver - $206
	Volunteer Liability Insurance $113

Commercial Insurance
Driver Recruitment, Screening
Verification, Training

Riders, Drivers, Road Users

STPs

Reimbursement Methods

For INTRA-CITY travel
(i.e., Pasadena) use:

TRIP PLAN ($2.50 per trip)

For INTER-CITY travel
(i.e., Pasadena to Glendale) use:

MILEAGE PLAN (30¢ per mile)

For LONG-DISTANCE travel
(i.e., Pasadena to Santa Monica) use:

MONTHLY STIPEND PLAN (flat rate per month)

$24.00/cap per rider – Total Reimbursement $4,860 – Per Ride Cost $2.01

What We Learned

1. Liability & risk must be determined from the "get-go".
2. Insurance costs do not need to be a barrier to action.
3. A transportation services does not have to be expensive.
4. It is not necessary to purchase vehicles or hire staff.
5. Riders can recruit their own drivers and schedule rides.
6. Volunteer friends are willing to drive when someone asks them.
7. A variety of partners & advisors contribute to the agenda.
8. A program like PasRide needs to supplement – not replace.
9. The PasRide concept is hard to get across to people.
10. PasRide can be adapted in a variety of ways.

STPs

Volunteers Are The Hope

Role of Drivers
Volunteer Driver Challenge
Where To Find Them
How To Recruit Them
How To Manage Them
Who Volunteers?

How Do We Get Volunteers?

"A Six Month Process"

STPs

Transportation Drivers

Who Are They & What Do They Do?

Who Are We Talking About?
family members, friends, neighbors
paid drivers, volunteer drivers

What do they do?
they drive from point to point
some drivers also…
play the role of escort
help schedule rides
train other drivers

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The Volunteer Driver Challenge

Transportation providers say…

"Volunteer drivers are the most difficult volunteers to recruit…
But once you've got them…you've got them."

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Where To Find Volunteers

Churches
Interfaith Groups
Volunteer Agencies
Senior Centers
Agencies on Aging
Social Service Agencies
Health Services
Volunteer Groups (RSVP)
Americorps
Community Service Agencies

The Local University
The Mayor's Office
City Councils
County Commissioners
Legislators
Congressional Reps.
Public Transit Services
Paratransit Services

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How To Recruit Volunteers

Understand Their Motivation

To meet people
To make a contribution
To be reimbursed

"There but for the grace of God go I…"

62% volunteer drivers participate because they want to help others
62% volunteer drivers help as transportation escorts
95% satisfied because they feel needed
76% satisfied because they get to know riders

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How To Recruit Volunteers

Tell Them What They'll Need

To use personal vehicles
To obtain minimum insurance
To provide documentation
- insurance
- drivers license
- driving record

To take a driver training course
- sensitivity
- classroom
- behind the wheel

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How To Recruit Volunteers

Tell Them What They'll Do

Provide quantity and/or quality of life rides
Help the rider
- through the door
- to the destination

Stay with the rider
Drive to interesting Help places

91% provide trips for medical reasons
91% stay with rider during appointment
91% help rider get in and out of vehicle
81% provide door-thru-door assistance

STPs

How To Manage Volunteers

Have A Management Plan

"Good Management Is Good Risk Management"

an application process
screening
documentation
criteria for success
a contract'
training
a handbook

a job description
a manager
a feedback mechanism
an "office"
an insurance policy
logistics support
evaluation
recognition

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Volunteers Are The Key

....volunteers are making enormous contributions to senior transportation.

....volunteers participate in traditional and non-traditional transportation services.

....volunteers could be considered "transportation caregivers".

....involving volunteers can be done by transportation services, aging services, or free standing organizations.

....volunteer drivers are said to be the most difficult volunteers to recruit, "but once you've got them, you've got them."

....we will need more volunteers the future...

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Volunteers Are Out There

Adult Volunteers in the United States

50% adults asked to volunteer = 71% volunteered
44% of adults volunteer = 83.9 million Americans
3.6 hours per volunteer = 15.5 billion hours @ $15.40 per hour
Dollar value of volunteer time…

$239,200,000,000

Senior Volunteers in the United States (age 55+)

27.7 million total number of senior volunteers
3.3 hours per volunteer = 4.8 billion hours @ $15.40 per hour
Dollar value of volunteer time…

$71,200,000,000

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STAR Search For Volunteer Drivers

Topic:	Volunteer Drivers
Approach:	Announcements through Network
Method:	Nomination
Research:	Surveys & Stories
Target:	Volunteer Driver Organizations
	Volunteer Drivers
STAR Award:	$10,000 +
Results:	Management & Motivation

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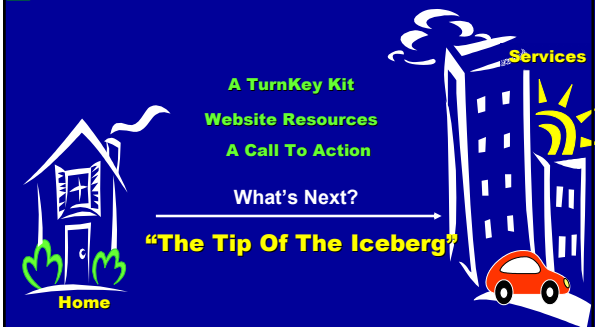
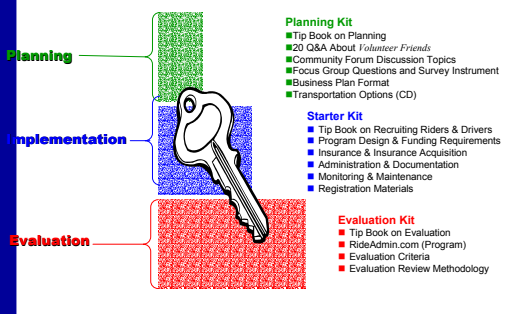
Wrap Up



STPs

Volunteer Friends TurnKey Kit



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Beverly Foundation Website

Senior Transportation Resource STORe

(Senior Transportation Options Repository)

TRANSPORTATION & BEYOND
Mobility & Senior Mobility
Demographics
Policy Papers
Research Papers
Publications
Snapshots
Educational Presentations

TRADITIONAL TRANSPORTATION
Vehicle & Program Options for Seniors
Research
Publications
White Papers
Snapshots
Educational Programs

SUPPLEMENTAL TRANSPORTATION
Vehicle & Program Options for Seniors
Research on STPs
Publications and White Papers
Snapshots
Educational Programs
STPs Prog. Start-up Materials

OFF THE ROAD
Senior Care and Services
Research
Publications

Visit us on the web at:

www.beverlyfoundation.org

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A Call To Action

What Do We Know?

Transportation is "the tie that binds".

Transportation dependency is a problem.

Increasing numbers of elders (85+) seniors are affected.

Families, communities, service providers, and policy makers can act.

What Can We Do?

Learn about available options.

Improve the "senior friendliness" of options.

Find ways to make options part of life "before the crisis".

Develop new funding streams for "low cost" options.

Tap into America's volunteers.

STPs

Special Thanks

AAA Foundation for Traffic Safety

NASUA National Association of State Units on Aging

CTAA

Easter Seals Society

Shepherd's Centers of America

California Association for Coordinated Transportation

California Association of Adult Day Services

Wheels of Wellness Volunteer Division

Timothy Puglia
Software Developer

History of our Volunteer Division

- Wheels is the oldest and largest volunteer transportation agency in the country
- Wheels began in 1959 with only volunteer drivers
- Starting in the late 1960's, Wheels began using paid drivers to cover what the volunteer drivers could not handle

Current make up of Volunteer Division

- Volunteer and paid drivers working in concert
- Currently approximately 40 volunteer drivers and 5 paid drivers.
- Funding comes from the United Way, Fundraising events, Foundations, an Annual Appeal to individuals, and Business and Industry

Qualifications of Volunteer Drivers

- Clean driving record
- True love of people

Driver Training

- Our medical assistance drivers go through 32 hours of training
- Volunteer drivers, however, are **not** required to go through training
  - Don't want to discourage them from volunteering
  - All training materials are given to volunteer drivers and they are invited to attend training sessions if they wish
  - When they start, they go on a ride-along with another driver

Vehicles Utilized

- Volunteers use their own personal vehicle at their own cost

Compensation for Volunteers

- Volunteers get their choice of:
  - Letter attesting to activity (used for tax purposes)
  - Mileage Reimbursement of $.31 per mile
    - Most if not all volunteers take the tax letter

Scope of work

- Ambulatory
  - No wheelchairs
- No distinction between paid drivers and volunteer drivers in scheduling rides
  - However, we allow volunteers to choose the times and areas in which they would like to drive.
    - Paid drivers “fill the gaps”

Insurance

- Primary coverage – Volunteer’s personal auto policy.
  - Volunteer discloses driving activity to agent
- Secondary coverage – Wheel’s non-owned auto coverage
  - Umbrella policy that covers cost over and above that of the driver’s own policy
  - In the 40+ year history of Wheels, there have been only two claims.

Questions?

Tim Puglia
tpuglia@wheelsinc.org

Hunterdon County

Volunteer Driving Program

Hunterdon County

Land size: approximately 430 square miles
Northwest NJ
Population: 122,000
Seniors: 39,000 (32%)

Rural- Suburban sprawl- Small towns
No public transit, no taxi service

Hunterdon County LINK Transportation
Hunterdon County Department of Human Services

1985- Consolidated system- all special needs transportation funding pooled to fund bus system.

Demand and modified fixed route service- in county travel.

Approximately 700 trips per day.

www.ridethelink.com

Volunteer Driver Program History

1989-90 Need Identified

Pattern of "denials" through the LINK Dispatch office.

LINK Transportation System unable to transport.

Primarily Senior medical appointments.

Hunterdon County Office on Aging contacted Men's Rotary; challenge presented. Rotary provided 8 volunteers.

Developing the Program

The **Volunteer Driver Program** was designed to serve two purposes:

1. provide interested citizens the opportunity to meaningfully serve their community.
2. provide an opportunity to supplement the services of the Hunterdon County LINK Transportation System.

Primary service need- Seniors, Disabled

Medical Appointments- in county/out of county

Monday- Friday 8 a.m.- evening

2 County vehicles available- limit 2 clients per day.

Average 13-15 volunteers

Program Guidelines

1. Trips are only provided to riders unable to use the regular LINK Service for their appointment.
2. Trips provided for medical transport only.
3. Volunteer trips are strictly "single purpose" trips- no stops, prescription pick up allowed.
4. Clients must be ambulatory, no wheelchairs.
5. Limit of 2 trips per month per client.
6. An insured County car is provided for transport.
7. Volunteers must have a valid drivers license.
8. Volunteers must have a physical exam by the county doctor.
9. Scheduled trips may not exceed 75 miles one way.
10. Suggested donations -$2 in county, $4 out of county

Client responsible for parking, toll costs.

Volunteer Recruitment

- Service clubs, community organizations, churches, Office on Aging.

-Individuals. Those not affiliated with an organization may volunteer by providing two (2) character references.

-Personalized approach in recruiting, retaining volunteers.

Volunteer Processing

-Volunteer expresses interest and availability.

-Copy of valid driver's license must be provided. License is logged in and renewal date is noted.

-HC Dept. of Human Services requests DMV license check. Driver is determined to have an acceptable/unacceptable driving record.

Physical Examination

-Once driving credentials are confirmed, volunteer is referred to County Personnel Office for referral to County physician. NO EXCEPTIONS.

- Results are returned to County staff and medical acceptability is confirmed.

-**Volunteer is added to "call list".**

Volunteer Orientation

- Review of "9 Point Policy".
- Need for patience and understanding toward clients, some of whom may not be necessarily friendly or companionable on a given day/trip.
- Review of donation envelope procedures.
- Physical Orientation to County vehicle; use of logs, emergency contact information, vehicle mechanics.

Program Delivery

All requests are screened to determine level of medical appointment (follow up visit, surgery, treatment)

Outpatient surgery transport is evaluated on a case by case basis.

Notification of ride varies, but averages one week in advance.

Number of trips/clients vary by month; average 8-15 clients per month.

Window sign provided for drop offs/handicapped parking.

Day of Transport

Driver picks up County vehicle, client information.

Completes Trip Manifest Log.

Picks up client, notes any special issues.

Provides donation envelope.

Returns vehicle, donation envelope, and manifest to HCDHS.

Recent Program Growth

2000- 169 hours, 17 unduplicated clients

2003- 409 hours, 44 unduplicated clients

through August 2004- 314 hours, 38 unduplicated clients.

Reasons for Program Success

- Board of Chosen Freeholders supportive of Senior services
- Hunterdon County spirit of volunteerism
- "Seniors Helping Seniors" theme
- Well organized LINK Dispatch office
- Clear program requirement
- Clear program expectations
- Personalized approach to recruiting volunteers
- Volunteer Recognition
    - Annual Volunteer Recognition Breakfast
    - All drivers are acknowledged publicly