National RTAP
Rural Transit Assistance Program

Volunteer Driver Program Toolkit

Prepared for National
RTAP

Prepared by KFH
Group, Inc.

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Table of Contents

Welcome

Welcome to the National RTAP Volunteer Driver Program Toolkit! This Toolkit was developed to assist organizations that provide passenger transportation services to persons with transportation needs and help them with developing and maintaining volunteer driver programs. The Toolkit is a guide that provides the framework for developing and maintaining volunteer driver programs.

Volunteer driver programs are a critical component of many public transportation systems as well as human services transportation, offering specialized or expanded services beyond those typically available through general public transit services and providing a more personal and one-to-one transportation service for customers who may require additional assistance.

The original Volunteer Drivers Guide was developed with broad input from model programs currently operating in Washington State and in other parts of the United States. The Community Transportation Association of the Northwest (CTANW) was contracted by the Washington State Department of Transportation (WSDOT) to review and update the Guide in 2011-2013. In 2024 National RTAP contracted with KFH Group, Inc. for the purpose of updating the 2013 version of the Guide by broadening its scope to the national level and developing an online Toolkit. A Stakeholder Workgroup made up of representatives from National RTAP, WSDOT, and the Colorado Association of Transit Agencies (CASTA) served as an advisory group to the project, providing input and feedback through the guidebook update and toolkit production process. Please see the Acknowledgements Section for more background information.

This Toolkit contains recommendations, examples, and sample forms as well as informational online links, attachments, and resources. It also contains information and resources to help organizations navigate through complex requirements imposed by federal and state laws and various funding organizations. The goal is to strengthen existing programs and to serve as a guide for the development of new programs.

The Toolkit contains the following sections:

- Welcome
- Volunteer Driver Programs
- Important Information about Riders
- Establishing and Managing a Volunteer Driver Pool
- Day-to-Day Operations
- Volunteer Driver Program Records
- Case Studies with Appendix
- Model Forms (Templates), Policies, and Procedures
- Glossary

To view the topics included in each section, see the table of contents or visit the online Toolkit and click on any of the sections in the left toolbar to expand your navigation options. A "How to Use This Toolkit" chart was also developed to help the reader explore topics from the perspective of a "Beginner, Intermediate, or Advanced" volunteer driver program.

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How to Use This Toolkit

Skill Level	Section 2- Volunteer Driver Programs	Section 3 – Important Information About Riders	Section 4 – Establishing and Managing a Volunteer Driver Pool	Section 5 – Day-to-Day Operations
Beginner For brand **new** to programs (or those considering **starting** a volunteer driver program).	**Volunteer Driver Programs and Sponsoring Organizations** **Mission Statements, Goals, and Objectives** **Rider Eligibility** **Limiting Financial Exposure Related to Risk** **Insurance** **Risk Management** **Community Relations** **Policies and Procedures** **Funding** **Subcontracted Services** **Operating Across Boundaries**	**Rider Eligibility** **Communication with Riders** **Children** **Rider Surveys** **Rider Grievances**	**Volunteer Drivers** Recruiting Drivers Qualifications Driving History Requirements Driver Selection Retaining Drivers **Driver Duties** **Driver Performance** **Driver Conduct** **Training Volunteer Drivers**	**Scheduling** **Vehicles, Equipment, and Maintenance** **Trip Plans** **Inclement Weather** **Incidents, Accidents, and Collisions**

Skill Level	Section 2- Volunteer Driver Programs	Section 3 – Important Information About Riders	Section 4 – Establishing and Managing a Volunteer Driver Pool	Section 5 – Day-to-Day Operations
Intermediate For programs that have been **in operation** for a few **years.** (Also, for seasoned programs.)	**Community Relations** Marketing Branding **Funding** Coordination and Planning **Operating Across Boundaries** Mobility Management	**Communication with Riders** Information Accessibility	**Volunteer Drivers** Recruiting Drivers Retaining Drivers **Driver Performance** Driver Review Process Performance Evaluations	**Scheduling** Technology

Skill Level	Section 2- Volunteer Driver Programs	Section 3 – Important Information About Riders	Section 4 – Establishing and Managing a Volunteer Driver Pool	Section 5 – Day-to-Day Operations
Advanced For Volunteer Driver Programs ready to offer **"next level"** services.	**Risk Management** Post Sedation Transportation			

Skill Level	Section 6 – Program Records	Section 7 – Case Studies	Section 7 - Appendix	Section 8– Model Forms (Templates), Policies, and Procedures

Beginner
 	
Organizations **new** to volunteer driver programs
 	
(or those considering **starting** a volunteer driver program)
	Driver Records
	
	Vehicle Records
	
	  Agency Owned Vehicles
	
	  Privately Owned
	  Vehicles (POVs)
	
	Rider Records
		Part One – Individual Case Studies:
		
		Senior Alternatives in Transportation (SAINT), Colorado
		
		Space Coast Transit/Volunteers in Motion, Florida
		
		WexExpress New Freedom, Michigan
		
		Nevada Rural Counties Retired and Senior Volunteer Program (Nevada RSVP), Nevada
		
		Ride Connection, Oregon
		
		Drive a Senior, Texas
		
		King County Metro Community Van, Washington
		
		New Freedom/ Compass IL, Wisconsin
			Recruitment Materials
			
			Handbooks and Guides for Volunteers
			
			Handbooks and Guides for Riders
			
			Insurance Resources
			
			Policy and Procedure Resources
			
			Transportation Plans and Trip Logs
			
			Training materials
				Policies and Procedures – Examples
				
				Model Forms (Templates) and Examples

Skill Level	Section 6 – Program Records	Section 7 – Case Studies	Section 7 - Appendix	Section 8– Model Forms (Templates), Policies, and Procedures
Intermediate For programs that have been **in operation** for a few **years**	**Performance Metrics** How to Record Trip Information	**Part Two – Common Themes:** Driver Incentives Training Strategies Risk Management Strategies Software Considerations Medical Considerations		

Skill Level	Section 6 – Program Records	Section 7 – Case Studies	Section 7 - Appendix	Section 8– Model Forms (Templates), Policies, and Procedures
Advanced For Volunteer Driver Programs ready to offer **"next level"** services		**Part Three – Lessons Learned:** Volunteer Recruitment and Retention Communication with Volunteers and Riders Program Sustainability and Funding Volunteer Drivers - Clarity and Expectations Technology and Software Utilization Liability and Safety Concerns Volunteer Appreciation and Recognition Service Scope and Flexibility		

Section 2 – Volunteer Driver Programs

Photo credit: Nevada RSVP

Public transportation, which includes Tribal transit, urban, and rural transit systems, as well as human services transportation, encompasses a broad range of services designed to meet the mobility needs of population groups who have few if any options for travel. Older adults, people with disabilities, veterans, and people with lower incomes are often in particular need of greater mobility options. Depending on their abilities, their environment, and the transportation services available in their community, these individuals may also require a variety of mobility options. Volunteer driver programs and organizations that choose to sponsor volunteer driver programs help to fill critical mobility gaps for people who live outside public transit service areas, need to access jobs or services outside public transit service hours, or need more personal or specialized services to travel.

Organizations like [Area Agencies on Aging (AAA)](#), [Community Action Agencies](#), independent living centers, faith-based organizations, urban, rural and Tribal transit systems are well suited to serve as sponsoring organizations to volunteer driver programs. Sponsoring organizations provide necessary structure, financial oversight, and liability coverage.

This section of the Toolkit introduces specific things an organization should do as a standard part of planning, implementing, and operating a volunteer driver program. It provides an overview of requirements, processes, and procedures known to be of value to volunteer driver programs and sponsoring organizations. Methods and practices used by a variety of volunteer driver programs and sponsoring organizations are included as examples throughout.

Volunteer Driver Programs

- Volunteer Driver Programs and Sponsoring Organizations
- Mission Statements, Goals, and Objectives
- Rider Eligibility

Limiting Financial Exposure Related to Risk

- Tips for Understanding Volunteer Insurance
- The Volunteer Protection Act of 1997
- State Laws for Nonprofits and Volunteer Liability

What Type of Insurance is Needed?

Section 2 – Volunteer Driver Programs

- Liability Insurance
- Property Insurance
- Volunteer/Employee Dishonesty
- Medical Insurance

Risk Management

- Post Sedation Transportation

The Importance of Community Relations

- Community Outreach
- Marketing
- Branding

Policies and Procedures

- Organizational Policies
- Emergency Management
- Personnel

Funding

- Local, State, and Federal Funding

Subcontracted Services

Operating Across Borders

- County Borders
- Mobility Management

Additional Reading on Other Types of Volunteer Driver Programs

Section Resources

Volunteer Driver Programs and Sponsoring Organizations

While some volunteer driver programs are not supported by a sponsoring organization, most fit into a local or regional community service provider's services. The sponsoring organization is the key element in the development and operation of many volunteer driver programs.

Photo credit: King County Metro/Community Van

A volunteer driver program and a sponsoring organization:

- **Should be of sufficient organizational strength and structure to manage a volunteer driver program.** A volunteer driver program will require processes and policies that are specific to the establishment, administration, and operation of a volunteer driver pool. Organizations that operate volunteer driver programs should also have sufficient financial management systems to account for and report to funding agencies, and overall should practice sound financial management practices.

- **Should set Mission, Goals, and Objectives for the volunteer driver program.** Mission statements, goals, and objectives from a variety of volunteer driver programs are included in the section below and are included with each case study in *Section 7 – Case Studies and Methodologies*.

- **May choose to limit the exposure of their volunteers, their governing board, and their staff.** As an example, under Washington State law, RCW 24.06.035 Indemnification, it is possible for a Sponsoring Organization, private for-profit or non-profit, to amend its

Articles of Incorporation to indemnify Directors and Officers, staff and agents (including volunteers) and to shield their personal assets from judgments in lawsuits for negligence.

- **Is encouraged to carry public liability insurance.** To limit liability of volunteers, a sponsoring organization should consider public liability insurance coverage. Washington State law, RCW 4.24.670 Volunteer Liability, is representative of how a volunteer of a nonprofit organization or governmental entity may not be personally liable for harm caused by an act or omission of the volunteer as long as they are performing within the scope of their duties. Harm cannot have been caused by willful or criminal misconduct, gross negligence, reckless misconduct, or a conscious, flagrant indifference to the rights and safety of the individual harmed by the volunteer.

Mission Statements, Goals, and Objectives

It is important to clearly identify the values and vision of the volunteer driver program in a written mission statement. Goals and objectives are then needed to successfully carry out the program's mission. The following guidance has been adapted for use by volunteer driver programs from the National RTAP's Transit Manager's Toolkit's section on Mission and Leadership.

Mission statements describe what the program does for the community and should align with the vision of the sponsoring organization, as appropriate. A mission statement should define the program's purpose in a concise, clear manner.

If a volunteer driver program and sponsoring organization do not have a written vision and mission statement, this is an opportunity to establish both statements through a collective process. To maintain effectiveness and to ensure they still align with the services the agency provides, mission statements should be reviewed periodically and updated, as necessary.

The process of creating a mission statement should be collaborative, but the writing of the statement should be led by one person. **The following are characteristics of a strong mission statement:**

- No longer than a few sentences
- Sixth grade level of comprehension
- Written in active voice
- Has few superlative adjectives or adverbs, if any
- Direct and honest

Mission statements should be reviewed for their effectiveness and validity. **Keep these questions in mind:**

- Is it relevant and current?
- Is it too difficult to understand?
- Will it inspire volunteers?
- Will it unify volunteers?

Examples of Mission Statements used by Volunteer Driver Programs:

- Drive a Senior, Austin, Texas – "Helping older adults live independently, avoid social isolation, and age in place by providing transportation and other support services." Read more about **Drive a Senior** in *Section 7 – Case Studies and Methodologies*.

- [Neighbor Ride, Howard County, Maryland](#) – "Neighbor Ride enhances the health and quality of life for Howard County's seniors by providing the comfort and peace of mind of affordable, passenger-focused transportation services through a reliable, volunteer-based system."

- [Volunteer Transportation Center, Watertown, New York](#) – "Provide transportation to health, wellness and critical needs destinations utilizing volunteers and mobility management for anyone who has barriers to transportation."

Goals for a volunteer driver program might include coordination of volunteer resources (drivers), service design, service coverage (address mobility gaps, particularly in rural and underserved areas), program leadership and development, vehicles, equipment, maintenance, facilities, property, customers, communities to be served, marketing, financial viability, and sustainability (diversifying funding sources, including grants and community donations).

Objectives are needed to support program goals. Short-term objectives might include recruitment and retention of volunteers (maintain an active pool of trained and engaged volunteers), rider satisfaction, and low denial rates.

Rider Eligibility

It is crucial that volunteer driver programs decide who is eligible for the service and that they clearly communicate that information to potential riders and potential volunteers. Rider eligibility requirements are included with each case study in *Section 7 – Case Studies and Methodologies*.

For example, service eligibility may be based on:

- Age or disability status

- Lack of access to other transportation services

- Residency within the program's service area

- Other factors (Some programs require that riders own or have access to a cell phone.)

Program funding may also be a consideration for rider eligibility. See *Funding* later in this section for more guidance on this aspect of rider eligibility.

Space Coast Transit/Volunteers In Motion's clients are primarily older adults; eligibility is determined based on functional need rather than financial status. Read more about **Volunteers In Motion** in *Section 7 – Case Studies and Methodologies*.

Photo credit: Volunteers in Motion

To qualify for **Drive a Senior** service, individuals must reside within the designated service area, be at least 65 years old, and feel uncomfortable driving. Read more about **Drive a Senior** in *Section 7 – Case Studies and Methodologies*.

Photo credit: Drive a Senior/Chariot

Limiting Financial Exposure Related to Risk

It is a common misconception that federal and state and volunteer protection laws protect nonprofits as well as volunteers. "Primary protection emanates from good management, personnel policies, and the regular assessment of your risks, a regularly updated risk management plan, and organizational policies and insurance coverages that address the needs identified by these processes." (Risk Management and Insurance, Arizona State University (ASU) Lodestar Center for Philanthropy and Nonprofit Innovation.) A sponsoring organization will want to take steps to assure that it is protected from the unique risks posed by the operation of a volunteer driver program.

Waivers, Releases, Agreements to Participate, and Indemnification: These are all processes that a sponsoring organization, public or private, can use to limit and/or share program risks with riders and referring authorities. These procedures may be used when requested transportation is deemed to have special circumstances or risks. See the *Risk* section below for additional resources.

The information that follows is intended to assist new volunteer driver programs with a better understanding of the federal and state laws for nonprofits and volunteer liability.

There are a variety of ways to mitigate risk with volunteer driver programs.

Hopelink Community Van in Redmond, Washington, is sponsored by King County Metro Community Van and utilizes the transit agency's insurance umbrella for their program. They have their volunteer drivers fill out an application through King County Metro, ensuring that the drivers are covered under a broader insurance umbrella without having to incur additional expenses.

"When Hopelink first took on the Community Van contract in partnership with Metro, our lawyers thought it would be Hopelink volunteers driving (and not Metro's) and strongly advised us NOT to start a volunteer driver program. If it wasn't for having Metro take on the risk, we wouldn't be operating a volunteer driver program." Staci Sahoo, Director Mobility Management at Hopelink

Read more about the King County Metro Community Van Program and Hopelink in Section 7 - Case Studies and Methodologies.

Tips for Understanding Volunteer Insurance

The sponsoring organization's insurance policies may also impact the volunteer's insurance coverage. This is especially true for personal auto insurance policies. The insurer may provide coverage for volunteer drivers only when there is no reimbursement for expenses. See the article: Volunteer Driver Insurance in the Age of Ridehailing, AARP (2020) for more insight on difficulties that volunteer drivers may face with personal auto insurance policies. The sponsoring organization may want to consider a commercial general liability policy to cover volunteer drivers.

This list below has been adapted from Tips for Understanding Volunteer Insurance, Volunteers and Insurance Fact Sheet (2023) Wisconsin Office of the Commissioner of Insurance.

For Volunteers:

1) Read your insurance policies to understand your coverage.

2) Talk to your insurance agent or your insurer about any concerns you may have. Is there an issue related to reimbursement for expenses (gas, state inspections, etc.)?

3) Shop around for coverage. While one insurance company may not cover your volunteer activities, other insurers may.

4) Talk to the organization you will be volunteering for about insurance coverage. Is there a commercial auto insurance policy in place?

For Organizations:

1) Read your insurance policies to understand what is and is not covered.

2) Review your insurance coverage at least annually with your insurance agent. Have there been any changes to state coverage requirements?

3) Make sure your policies and procedures line up with your insurance coverage.

4) Before conducting any large public event, make sure you discuss coverage with your insurance agent or your insurer.

5) Discuss any insurance issues with your employees and volunteers to make sure there is coverage in case of an unfortunate event.

The Volunteer Protection Act of 1997

The Federal Volunteer Protection Act of 1997 (VPA) was signed into law by Congress in 1997. The stated purpose of the VPA was to promote the interests of social service program beneficiaries and taxpayers and to sustain the availability of programs, nonprofit organizations, and governmental entities that depend on volunteer contributions. The VPA does not affect the liability of nonprofits and governmental entities with respect to harm caused by volunteer actions. 42 USC Section 14503 - Limitation on liability for volunteers provides certain protections from liability for volunteers serving nonprofit organizations or government entities for harm caused by an act or omission of the volunteer on behalf of the organization or entity if:

1) The volunteer was acting within the scope of the volunteer's responsibilities in the nonprofit organization or governmental entity at the time of the act or omission;

2) If appropriate or required, the volunteer was properly licensed, certified, or authorized by the appropriate authorities for the activities or practice in the state in which the harm occurred, where the activities or practice was undertaken within the scope of the volunteer's responsibilities in the nonprofit organization or governmental entity;

3) The harm was not caused by willful or criminal misconduct, gross negligence, reckless misconduct, or a conscious, flagrant indifference to the rights or safety of the individual harmed by the volunteer; and

4) The harm was not caused by the volunteer operating a motor vehicle, vessel, aircraft, or other vehicle for which the state requires the operator or the owner of the vehicle, craft, or vessel to-

   a. possess an operator's license; or

   b. maintain insurance. [42 USC Section 14503(a)]

With respect to state laws for nonprofits and volunteer liability, the VPA pre-empts any inconsistent law of a state, except if the state law provides more liability protection for volunteers than the VPA provides. (42 USC Section 14502 – Pre-emption and election of State non applicability) If the laws of a state limit volunteer liability subject to one or more of the following conditions, such conditions shall not be construed as inconsistent with 42 USC Section 14503 - Limitation on liability for volunteers:

1) A state law that requires a nonprofit organization or governmental entity to adhere to risk management procedures, including mandatory training of volunteers.

2) A state law that makes the organization or entity liable for the acts or omissions of its volunteers to the same extent as an employer is liable for the acts or omissions of its employees.

3) A state law that makes a limitation of liability inapplicable if the civil action was brought by an officer of a State or local government pursuant to State or local law.

4) A state law that makes a limitation of liability applicable only if the nonprofit organization or governmental entity provides a financially secure source of recovery for individuals who suffer harm as a result of actions taken by a volunteer on behalf of the organization or entity. A financially secure source of recovery may be an insurance policy within specified limits, comparable coverage from a risk pooling mechanism, equivalent assets, or alternative arrangements that satisfy the State that the organization or entity will be able to pay for losses up to a specified amount. Separate standards for different types of liability exposure may be specified. [42 USC Section 14503(e)]

State Laws for Nonprofits and Volunteer Liability

Prospective sponsoring organizations should be aware of the volunteer protection laws in their state and service areas. Examples of state volunteer protection laws are listed below.

- Arizona: Actions Against Volunteers, Qualified Immunity; Insurance Coverage (Ariz. Rev. Stat. 12-982).

- Arkansas: Arkansas Volunteer Immunity Act, (Ark. Code Ann. 16-6-102)

- Florida: Florida Volunteer Protection Act (Fla. Stat. 768.1355).

- Washington: Liability of Volunteers of Nonprofit or Governmental Entities (Wash. Adm. Code 4.24.670).

- Wisconsin: Limited Liability of Volunteers (Wis. Stat. 181.0670)

Note: At the time that the Volunteer Protection Act of 1997 was drafted, all states had enacted laws related to Volunteer Liability.

What Type of Insurance is Needed?

As described in the previous section, insurance is an important part of limiting the financial exposure due to the risks associated with operating a passenger transportation program. Some states have specific provisions or requirements for the types and levels of coverage that nonprofit agencies, including volunteer driver programs must have in place. As examples:

[Arizona: Actions Against Volunteers, Qualified Immunity; Insurance Coverage (Ariz. Rev. Stat. 12-982)](). Arizona law provides that the liability of the insurance carrier with respect to the insured and any other person using the vehicle with the express or implied permission of the insured shall extend to provide excess coverage for a nonprofit corporation or nonprofit organization for the acts of the operator in operating a motor vehicle at all times when the operator is acting as a volunteer for that nonprofit corporation or nonprofit organization.

[Washington: Private, Nonprofit Transportation Providers, Insurance (Wash. Adm. Code 480-31-070)]() Washington law provides that the combined bodily injury and property damage liability insurance or surety bond must not be less than: Five hundred thousand dollars combined single limit for vehicles with a passenger capacity of less than 16 passengers, including the driver; One million dollars combined single limit for vehicles with a passenger capacity of 16 or more passengers, including the driver.

Volunteer driver programs and sponsoring organizations should consider the information below when deciding what type and level of insurance they should carry. Nonprofit organizations are encouraged to research and find experienced and trustworthy insurance advisors (agents or brokers) to work with in determining risk associated with operating a volunteer driver program. Volunteer driver programs should also plan to review insurance coverage on an annual basis or as recommended by their insurance advisor. Also see the [Risk Management]() in this section of the Toolkit.

Unless otherwise noted, the following list is adapted from Washington State's original Volunteer Driver Program Guidebook, the Nonprofit Risk Management Center's article: [What Basic Insurance Coverage Should a Nonprofit Consider?](), and the [Wisconsin Office of the Commissioner of Insurance's Volunteers and Insurance Fact Sheet (2023)]().

Liability Insurance

Liability insurance protects the sponsoring organization from claims alleging negligent conduct by the nonprofit, or its employees, volunteers or agents. Public liability insurance is also discussed earlier in this section.

Comprehensive or Commercial General Liability

Comprehensive or commercial general liability (CGL) coverage may include, but is not limited to, contractual liability, products and completed operations, property damage, and employer's liability. Names of individuals insured should include directors and officers, employees, representatives, agents, and volunteers. Properly structured, this coverage will include employment practices, errors and omissions, directors and officers, and volunteer's personal liability.

CGL policies cover claims against:

- Bodily injury (someone suffered an injury)

- Property damage (someone's property was damaged)
- Personal injury (offences for libel, slander, defamation, or malicious prosecution)
- Advertising injury (libel, slander, or copyright infringement due to advertising activities)

A CGL policy may also include medical expense that provides a low limit (usually $5,000 or $10,000 per person) for "no-fault" bodily injury. Recommended coverage should be set at a minimum $1 million for each incident.

Business Auto Liability

The volunteer's own automobile insurance is primary. The volunteer driver program or sponsoring organization's business auto liability would be secondary. Volunteer driver programs and sponsoring organizations should be sure that their policy covers non-owned and for hire vehicles. Generally, this policy would be in equal million dollar limits. Business auto coverage for any auto at no less than $1 million each accident is recommended. As an example, all Washington State non-profit transportation providers are required to have coverage of $1.5 million.

If the sponsoring organization or volunteer driver program owns vehicles, a business auto policy would be necessary to cover the vehicles for auto liability and physical damage.

The Nonprofit Risk Management Center's article, [Risk on the Road: Managing Volunteer Driver Exposures](#) discusses the difference between insurance coverage when a volunteer drives their own car and when a volunteer drives a vehicle owned by a nonprofit organization.

Umbrella/Excess Liability

An umbrella or excess liability policy provides the organization with additional policy limits for a catastrophic liability loss. The umbrella policy provides additional limits over the general liability, business auto liability, and employers liability policies. General liability and auto liability can be included under the umbrella. Many non-profit organizations are currently carrying $5 million of umbrella excess liability coverage.

Directors and Officers Liability Insurance

If not covered by general liability insurance, directors and officers (D&O) coverage or errors and omissions (E&O) coverage can be purchased. This coverage should include liability due to employment practices, which can involve treatment of volunteers. Included in the coverage can be all past, present and future directors and officers, employees, volunteers, trustees, committee members, and the entity itself.

Volunteers' Liability Insurance

As an alternative to, or in addition to other existing liability coverage, the Sponsoring Organization should consider participating in a volunteers' liability insurance program. This insurance typically provides coverage for medical treatment when the volunteer is injured during their volunteer services.

Property Insurance

A commercial property policy covers the property (furniture, fixtures, office equipment, stock, etc.) that the owned by the sponsoring organization. If the volunteer driver programs and sponsoring

organization owns any computers or electronic equipment, a computer and cyber security insurance policy may be worthwhile.

Volunteer/Employee Dishonesty

This insurance covers theft of funds and/or supplies by volunteers or staff. Most organizations will already have this coverage, sometimes called "bonding." Policies should be checked to insure each volunteer even though the risk may be low.

Medical Insurance

It is important that volunteer driver programs and sponsoring organizations recognize that vehicle insurance does not cover injuries that may happen while the volunteer is involved in activities separate from operation of the vehicle. Many volunteers are retired persons who may have inadequate or no medical insurance coverage.

Risks to the volunteers can be covered by a variety of methods. Medical or accident insurance provides excess accident medical coverage directly to a volunteer when he or she is injured traveling directly to or from, or participating in, volunteer activities. If Medicare covers the volunteer, the coverage would be in addition to that coverage. If the volunteer has no other coverage, the policy would be primary.

Risk Management

Insurance coverage is not the only way to manage risk. Understanding risk and engaging in risk management activities is important for sponsoring organizations and volunteer driver programs. The processes involved in identifying and managing risks can protect the sponsoring organization and its programs from harm while creating opportunities to improve a volunteer driver program's performance. See *Section 7 -Case Studies and Methodologies/Common Themes/Risk Management Strategies* for more thoughts, ideas, and solutions related to the subject of Risk Management.

The National Council of Nonprofits is a good resource for organizations that need help understanding the types of coverage that are available and most appropriate for volunteer driver programs and supporting organizations. See the National Council of Nonprofits' Running a Nonprofit. Also, Cybersecurity for Nonprofits.

As an introduction to risk management for nonprofits, the Nonprofit Risk Management Center (NRMC) website includes the following articles:

- Take Action on Risk: Make a Plan, Not a List - NRMC-Risk-Management-Essentials-Fall-2022-Newsletter. This article discusses a variety of approaches to risk action planning. An "Action Planning" worksheet is included.

- Transporting People: What to Consider - NRMC-Risk-Management-Essentials-Summer-2023-Newsletter. This article speaks to risk management as it pertains to drivers, including volunteer drivers.

The Nonprofit Risk Management Center published two documents in 2009 that that clearly explain what the Volunteer Protection Act does. Both documents include valuable information and examples of state volunteer protection and liability laws and cases. Volunteer Protection Act – Ten Years Later, October 2009 and State Liability Laws for Charitable Organizations and Volunteers.

The Nonprofit Risk Management Center's article, [Risk on the Road: Managing Volunteer Driver Exposures](#) in addition to the discussion on volunteer driver insurance coverage refer to above, this article also includes guidance on risk management specific to volunteer drivers and a sample volunteer driver pledge.

Greater Wisconsin Agency on Aging Resources (GWaar): [Volunteer Driver Insurance infographic 10-2023](#).

Post Sedation Transportation

Volunteer driver programs may be asked to provide rides for medical procedures that require a "responsible party" to accompany the patient home. Programs often struggle with the liability related to post sedation transportation. Volunteers, unless specifically trained to do this, should not be put into this situation and should not sign or have their name put down as the "responsible party." *[Section 7 -Case Studies and Methodologies/Common Themes/Medical Considerations](#)* compiles shared ideas and potential solutions related to client safety, training, and support for medical appointments.

While this Toolkit does not have a definitive answer to this difficult issue, we encourage the reader to review the King County Mobility Coalition and the Eastside Easy Rider Collaborative's memo on [The Need for Medical Chaperones for Post-Sedation Transportation](#). The memo summarizes the groundwork for piloting a medical chaperone project that would provide volunteers to accompany isolated older adults to and from medical appointments involving sedation when a "responsible party" is required post-procedure for patient safety. The memo's list of recommendations for a successful medical chaperone pilot has been adapted below:

- Use a cross-sector approach involving both healthcare and transportation.

- Partner with an organization that has a volunteer base in place, such as [Eastside Friends of Seniors](#) or [Catholic Community Services](#). Volunteers are an important factor given that for-profit caregivers are cost-prohibitive for many isolated, older adults in our community. Additionally, an existing volunteer base provides previously established, trusted relationships.

- Organizations need to consult with their current insurance company to inquire about adding liability coverage for volunteers.

- Develop a waiver specific to participation in the medical chaperone program that addresses insurance liability concerns.

- Consider partnering with a personal emergency alert system. A temporary device can augment and extend the supervision provided by a volunteer.

- Funding sources may be available through cities and organizations such as [Community Care Corps](#). Healthcare facilities may also be a potential funding source, given that they will benefit from medical chaperone volunteers, which would result in fewer appointment cancellations.

- Offices of Health Equity at healthcare settings may offer connections for information and potential funding sources. • Consider including stipends for volunteers in a proposed budget.

- [Trusted Riders](#) is one possible resource for training and credentialing of volunteer medical chaperones.

- Start small, with one healthcare facility and one procedure, then scale up.

- Review the study, [Outpatient Dismissal With a Responsible Adult Compared With Structured Solo Dismissal: A Retrospective Case-Control Comparison of Safety Outcomes](.).

The Importance of Community Relations

The drivers for the Sponsoring Organization will influence the opinion and image that people in the community have of the Sponsoring Organization. The way each volunteer driver performs their duties will contribute, either favorably or unfavorably, to the Sponsor's image. Drivers are also the best sources of information for management about how services are received in the community. The reality of providing public transportation service is that the public expects proficient driving; they take good performance for granted, and are quick to complain about poor performance.

Community Outreach

Well-defined and communicated policies can assist with public perception. Here are examples of volunteer driver programs that have easy to access policies on line and have also used social and local media to get the word out about their programs.

- **WexExpress New Freedom** in Cadillac, Michigan offers the following outreach messages - [Rider Resources](.), [Mobility Coordination Services](.), [Become A Volunteer](.), Local News Coverage Video: [The New Freedom Volunteer Driver Program Introduced On the four](.).

- **King County Metro Community Van** in Seattle, Washington launched a coordinated awareness campaign in 2021 to promote volunteer driving. This initiative included the development of a Rider Guide and a Volunteer Guide to assist new participants. [HopeLink Community Van Rider Guidelines](.) and [Welcome Packet](.).

- **Drive a Senior** in Austin, Texas uses informational and instructional videos on their websites, many of them are in English and Spanish like the [Drive a Senior/Chariot's 2025 Volunteer Recruitment – Espanol YouTube video](.). [Chariot Movie: formerly Drive A Senior Central Texas 2022](.), features a song recorded by a local, Austin-based musician.

Marketing

Marketing is a critical component to the success of any volunteer driver program. Many volunteer driver programs produce their own recruitment and advertising materials for the purposes of recruiting both new riders and volunteers. In some cases, marketing materials may also be helpful in educating medical and other service providers about the sponsoring organization's association with the volunteer driver program. WexExpress' partnership with Dynamic Physical Therapy in Cadillac, Michigan is an example of a very successful community partnership that also resulted in a great marketing opportunity.

Marketing materials may also be used to advantage when engaging with potential financial sponsors. It is important to remember that marketing will be different if you are advertising to potential riders or to potential volunteers.

Photo credit: WexExpress Mobility Coordination Services

A key element of marketing for all volunteer driver programs is messaging that resonates with volunteers - like the benefits of volunteering.

- **SAINT** in Fort Collins, Colorado uses an online webpage that includes requirements and skills needed, a description of Saint's program, and information on how to apply. [Drive for SAINT](#)

- **Drive a Senior** in Austin, Texas uses an online webpage that explains volunteer driver eligibility requirements, the program's service area, and how the program works for volunteers who drive their own vehicles.

- Driver recruitment efforts for **Ride Connection** in Portland, Oregon include outreach fairs, presentations at senior centers and civic organizations, newspaper ads, radio station advertisements, and word-of-mouth referrals.

Photo credit: Ride Connection

Volunteer driver programs will want to have a variety of informative and easy-to-use materials to help riders use the service.

- **SAINT** in Fort Collins, Colorado describes rider eligibility, helps riders register, and explains how the service works (service area maps, scheduling, riding, and cost) online. [Free Senior & Disabled Transportation Services – Ride with SAINT](#).

- **Drive a Senior** in Austin, Texas describes rider eligibility, enrolls riders, and describes the program's services and service area online.

As appropriate, attention should be paid to ensuring that materials are provided in languages other than English and be in accessible formats. QR codes may also be used to assist riders and possible volunteers in downloading the information. Materials to consider include:

- A volunteer driver program webpage on the sponsoring organization's website with additional resources for riders and volunteers

- Flyers, posters, and rack cards (see WexExpress New Freedom's rack card below) to explain the service and provide links to the sponsoring organization or volunteer driver program's website

- FAQs to help explain how to volunteer or request a ride, and pricing

- Grab-and-go business cards with the volunteer driver program's phone line and QR code

See more on the topic of *Communication with Riders/Information Accessibility* in *Section 3 - Important Information About Riders*.

Photo credit: WexExpress New Freedom

Branding

Branding and marketing enhance public awareness and volunteer recruitment. Branding a volunteer driver program will help differentiate it from other transit services in the area. There are various strategies to consider.

The following considerations for developing a brand have been adapted from the Texas Department of Transportation's [Texas Rural Microtransit Guidebook, Develop a Branding, Marketing and Outreach Plan](#):

- **Service name or nickname** – This is the name most people will use for the new service. Choose a recognizable and relatable name. Perhaps have a contest among students, combined with a full rebrand celebration. The new name should:

  - Be easily recognizable or catchy

  - Identify with the service – Such as "[Volunteers in Motion](#)" or "[Drive a Senior](#)"

  - Avoid acronyms

- **Vehicle colors and paint scheme** – Eye-catching vehicles that will be noticed and can instill pride in the new service. Is there a bright local color that symbolizes the area?

  - Decals for privately owned vehicles may also be considered to identify them as a part of the volunteer driver program. Volunteers should check with their insurance carrier to ensure that there are no concerns.

Photo credit: SAINT

- **Use flyers, social media, and local media coverage** to reach both riders and potential volunteers. Examples of marketing materials, flyers and posters, used by these volunteer driver programs and supporting organizations are included in the appendix to *Section 7 – Case Studies and Methodologies*.

Photo credit: Drive a Senior/Chariot: Thank You Video

- **Bring in system sponsors** – Having sponsor names on the sides of the vehicles, perhaps in a corner, can lend credibility to the system.

Photo credit: Drive a Senior/Chariot

- **Corporate Sponsorship** – Explore partnerships with local businesses (e.g., grocery stores, medical facilities) for financial support.

- **Establish a website and social media presence** – At a minimum, the website should include an introduction to the program's transportation services, information on how to ride, and information on how to become a volunteer. Many websites also include a program history, forms, newsletters, and access to annual reports. Each of the volunteer driver programs included in *Section 7 – Case Studies and Methodologies* has a website, webpage, or other social media.

Photo credit: King County Metro/Community Van

Additional Resources

Community Engagement Toolkit: Essentials for Planning & Facilitating Meaningful Conversations, National Aging and Disability Transportation Center (NADTC)

Nonprofit Community Association Handbook, State of Alaska, Department of Commerce, Community and Economic Development (2020)

Policies and Procedures

Policies and procedures are essential to the successful operation of any transit system, including volunteer driver programs. Policies and procedures should be written and made readily available to all staff, both paid and unpaid. While not all personnel and organizational standards apply to volunteers, it is important that the program's policies and procedures be clearly defined for everyone. In some cases, it may be necessary to require that volunteers acknowledge understanding of certain policies in writing, as well. However, care should be taken to strike a balance between the needs of the sponsoring organization and the nature of volunteering and the volunteer perspective.

In addition to guidance and information about organizational and personnel policies and procedures, this section of the Toolkit also contains important information and resources about how to develop policies and procedures that may be needed in the event of an emergency or crisis.

Photo credit: Drive a Senior/Chariot

Organizational Policies

Many funding agencies require sponsoring organizations (and stand-alone volunteer driver programs) to have specific written policies in place that apply to volunteers as well as paid employees. All programs should check with their funding agencies to determine what policies are required and, in some cases, which programs are not allowed to accept donations from passengers (example: Medicaid Non-Emergency Medical Transportation).

This list of recommended program policies was included in the original Washington State Volunteer Driver Program Guide and has been updated and expanded to include policies required or recommended by other sources, as noted. One such source is the Missouri Department of Transportation (MoDOT). MoDOT's [List of Recommended Policies for Volunteer Driver Programs, IN TRANSIT, March 2024)](#) has been adapted for use by a national audience in the list below.

Americans with Disabilities Act (ADA)

Volunteer driver program and supporting organizations will need to have policy in place to ensure that the services provided are in compliance with Title III of the ADA. For example, if the volunteer driver program operates under the sponsorship of a federally funded public transportation provider, the types and modes of other transportation services that are operated by the supporting organization mut be taken in to consideration. A volunteer's privately owned vehicle may not be appropriate to transport persons with certain disabilities because it is not wheelchair accessible. Those persons may need to be referred to appropriate alternate service providers.

All volunteer drivers should be trained to proficiency in the requirements of ADA. Training should include service animals, securing mobility devices (as appropriate), and sensitivity to people with disabilities.

[National RTAP's ADA Toolkit](#) and the [FTA's Americans with Disabilities: Guidance website](#) are both recommended resources for ADA compliance related questions. In addition to information meant to help public transportation providers comply with ADA regulations, [National RTAP's ADA Toolkit](#) also includes many other ADA related topics and resources including service animals, rider assistance and customer service, driver training, and examples of suggested practices.

Ethics

Volunteers should be included in the agency's Code of Ethics, the set of principles or concepts that reflect the volunteer driver program and sponsoring organization's core values.

Code of Conduct

A Code of Conduct for volunteer drivers should include specific behavioral rules and guidelines, expectations for respect and treatment of all staff, clients and community members, as well as service requirements.

Drug-Free Workplace

In accordance with [41 U.S.C. Section 8103 - Drug-free workplace requirements for Federal grant recipients,](#) Volunteer driver programs and sponsoring organizations that receive federal funding are required to comply with the Drug-Free Workplace Act. This means that the volunteer driver programs and sponsoring organizations must have a policy that prohibits employees and volunteers

from the unlawful manufacture, distribution, dispensing, possession or use of a controlled substance at any of the sponsoring organization's facilities and/or during any of the programs offered by the sponsoring organization.

Drug and Alcohol Testing

Volunteer driver programs and sponsoring organizations that receive federal funding should work with their funding agency to ensure compliance with drug testing policies and procedures.

Drivers, including volunteers, of vehicles that have been manufactured to transport 16 or more passengers, including the driver, must have a valid commercial driver's license (CDL) with a passenger endorsement. Drivers holding a CDL must be included in a drug and alcohol testing program that complies with U.S. Department of Transportation regulations at 49 CFR Part 40 - Procedures for Transportation Workplace Drug and Alcohol Testing Programs.

49 CFR Part 655.4 - Prevention of Alcohol Misuse and Prohibited Drug Use in Transit Operations, defines a volunteer as follows: "A volunteer is a covered employee if: (1) The volunteer is required to hold a commercial driver's license to operate the vehicle; or (2) The volunteer performs a safety-sensitive function for an entity subject to this part and receives remuneration in excess of their actual expenses incurred while engaged in the volunteer activity."

Volunteer driver programs and sponsoring organizations that receive federal funding are also required to comply with the Drug-Free Workplace Act. Sponsoring organizations must have a policy that prohibits employees and volunteers from the unlawful manufacture, distribution, dispensing, possession or use of a controlled substance at any of the sponsoring organization's facilities and/or during any of the programs offered by the sponsoring organization. To better understand FTA drug and alcohol regulations at 49 CFR Part 655, recipients or subrecipients of Sections 5307, 5309 or 5311 federal funding are encouraged to visit the FTA's Drug and Alcohol Program website. This website also includes 5310 Funding Frequently Asked Questions.

National RTAP's Substance Abuse Awareness Training, Testing, and Compliance Technical Brief, updated in 2022, is a helpful resource with information about the requirements, including frequently asked questions and links to a host of federal regulations and resources. National RTAP's Transit Manager's Toolkit/Drug and Alcohol Programs section is also a good resource for Drug and Alcohol Testing Program compliance related questions.

Section 4 - Establishing and Managing a Volunteer Driver Pool also includes helpful information about Commercial Driver Licenses.

Harassment

A volunteer driver program should have a policy that it will not tolerate verbal or physical conduct by any employee or volunteer which harasses, disrupts or interferes with another's work performance or which creates an intimidating, offensive or hostile environment.

Confidentiality

Transportation volunteers often know or become familiar with riders. While it is desirable to establish a positive relationship with riders, it is important to avoid situations that can create "Conflicts of Interest." A recommended practice is to have volunteers read and sign the confidentiality policy annually.

Reporting Suspected Abuse

This typically applies to serving vulnerable adults and children, based on state and federal legal requirements.

Supervision of Volunteers, including Annual Reviews

The volunteer driver program and supporting organizations should have a policy in place that clearly describes how volunteer drivers are supervised.

Section 4 - Establishing and Managing a Volunteer Driver Pool/Driver Selection contains more detailed guidance and information related to Volunteer Driver Selection Practices, Organizational Standards, and Personnel Actions.

Non-discrimination

Volunteer drivers are the face of the program. Expectations for respect and treatment of all paid and unpaid (volunteer) staff, clients and riders, and other community members, as well as for the agency or program's service requirements should be clearly documented in policy.

Payment and Donation Policies

The following information should be considered when developing and implementing Payment and Donation policies.

- **Copies of the volunteer driver program and sponsoring organization's payment and donation policies** should be made available to volunteers driving personally owned vehicles and copies should be posted in agency owned vehicles. The policies should also be included in brochures and advertising materials.
- **Programs should design a system that respects the individual's anonymity.** Some volunteer driver programs and sponsoring organizations request support from the community and the riders in the form of donations, yet do not pressure those who cannot afford to pay.
- **Drivers should be well informed about the donation policy.** It is not appropriate for drivers to demand donations from riders.
- **Many riders prefer to pay or make a donation** to the volunteer driver program or sponsoring organization once a month rather than make a donation each time they ride.
- **In order to avoid misunderstandings** and protect the rider's anonymity, a collection system that does not require drivers to handle cash is preferred.
- **When the volunteer driver program or sponsoring organization plans recreational trips outside of regular service hours**, it may be appropriate to charge riders a fare in order to recapture some of the costs associated with the trip. However, care must be taken to ensure compliance with all funding sources.

Reimbursing Volunteers

Most volunteer driver programs and sponsoring organizations reimburse volunteers for mileage and other authorized expenses. The program should have a form to be used by personally owned vehicle (POV) volunteers to document mileage and other expenses.

According to the [Rural Health Information Hub (RHIhub)](#), "Rural communities have implemented three types of reimbursement strategies for volunteer driver models: Volunteering without reimbursement, trip/time banking, and mileage reimbursement." The three strategies are summarized below and may be accessed in more detail on the [RHIhub's Volunteer Models for Rural Transportation website](#).

1) **Volunteering Without Reimbursement for Time or Mileage -** Volunteer drivers contribute their time, drive their own vehicles, and provide their own gasoline without reimbursement.

2) **Trip Banking/Time Banking -** Volunteer drivers contribute their time without reimbursement and bank the time they spend providing services. Some programs allow volunteers to exchange hours driven (banked) for other goods or services, like housekeeping or financial services.

3) **Volunteer Mileage Reimbursement Programs -** Volunteer drivers track their mileage to receive reimbursement. Some programs may reimburse in accordance with the government's mileage reimbursement rate, while others may pay volunteers per trip, up to a limited amount, or with non-monetary incentives.

The [National Council of Nonprofits](#) encourages all nonprofits to be familiar with the employment laws in the state(s) where the nonprofit operates. [State associations of nonprofits](#) frequently offer educational programs and reliable resources related to managing employees and volunteers.

Note: IRS regulations may allow for deduction of volunteer expenses if not reimbursed by sponsoring agency.

Persons with Disabilities Parking Privileges

Volunteer driver programs and sponsoring organizations may be able to apply for persons with disabilities special license plates and placards if they meet individual state criteria. **Here are some examples:**

- **Washington** – Volunteer driver programs and sponsoring organizations that meet Washington State's criteria at [RCW 46.19.020 for Eligible Organizations](#) can apply to the [Washington State Department of Licensing](#) for persons with disabilities special license plates and placards. [Organizational Application for Disabled Person](#) [Parking Privileges](#)

- **Connecticut** – An organization that transports persons with disabilities can request a special placard online from the [Connecticut Department of Motor Vehicles](#). A qualifying organization must use a vehicle at least 50% for daily transport of qualifying persons with disabilities.

- **Florida** – [Section 320.0848(1)(e), Florida Statutes](#), allows for the issuance of a persons with disabilities parking permits to any organization demonstrating a bona fide need. Organizations providing regular transportation service to persons with mobility impairments, or those certified as legally blind, may be issued one parking permit for each vehicle registered in the name of the organization, with a valid registration. [Florida Highway Safety and Motor Vehicles](#)

Volunteer driver programs and sponsoring organizations should have policy on the use of persons with disabilities plates and placards. **Those policies should consider the following:**

- **Persons with Disabilities parking privileges** (permits, placards, and license plates) may only be used while providing transportation to persons with disabilities. Sponsoring

Organizations should develop policies regarding appropriate use of the placards and permits including a requirement for their return when a volunteer is no longer registered with a program.

- **Volunteers should be trained** on the use of persons with disabilities plates and placards.
- **Sponsoring Organizations may be required to report** on the status of each permanent persons with disabilities parking placard or persons with disabilities special license plate on a regular basis depending on individual state laws.

Emergency Management

Volunteer driver programs and sponsoring organizations are encouraged to have policy and procedures in place in the event of an emergency incident. It is also a good practice for transit agencies, including volunteer driver programs, to be involved in planning local emergency response plans and procedures. Transit agencies, including volunteer driver programs, are often able to provide state and local emergency management officials with much needed information about how to reach vulnerable populations in times of crisis.

The Emergency Management section of National RTAP's ADA Toolkit includes information and resources that will be of value to volunteer driver programs and supporting organizations seeking to develop an emergency response plan with local emergency management agencies and other stakeholders.

National RTAP's Emergency Information Dissemination Technical Brief focuses on being prepared to work with the public, community leaders, and the media in an emergency. Two case studies are included in this brief that volunteer driver programs may learn from: Crawford Area Transit Authority (CATA) describes working to help its community through a fierce winter snowstorm and Central Oklahoma Transit System (COTS) details the process of providing services in the aftermath of a large tornado.

The American Public Transportation Association (APTA) Standards Development Program, Emergency Communication Strategies for Transit Agencies (Revised February 2020) contains standard measures that transit agencies, including volunteer driver programs, would use to prepare in advance for an emergency incident.

The list that follows is adapted from the APTA Standard and is meant to give volunteer driver programs and supporting organizations an idea of the different types of incidents that they should work with their local and state emergency management authorities to prepare for:

- Terrorist attacks
- Natural disasters
- Rider, volunteer, and employee safety or security issues
- Mass casualty incidents
- Catastrophic equipment failures or defects
- Power failures or blackouts
- Incidents resulting in evacuation or rescue from transit vehicles or stations
- Any other incident causing major service disruptions and necessitating notification and timely, accurate updates to riders, employees and volunteers, and the public

The [Regional Alliance for Resilient and Equitable Transportation (RARET)](#) is a workgroup composed of emergency managers, transportation providers, human service agencies, and community advocates representing King, Pierce, and Snohomish Counties in Washington State. Current efforts include convening regional partners to identify opportunities for collaboration and resource sharing, building a network of transportation providers able to operate in an emergency, and identifying the transportation needs faced by populations with access and functional needs in a regional emergency.

Photo credit: King County Mobility Coalition, Regional Alliance for Resilient and Equitable Transportation

RARET hosts an annual tabletop event in King County Washington. The workgroup is piloting key strategies to increase the critical transportation services available to populations with access and functional needs including older adults, people with disabilities, English-language learners, and others in the event of an emergency in the Puget Sound region.

RARET has developed the following strategies to increase the critical transportation services to populations with access and functional needs in the event of an emergency:.

Strategies

- **Gap Analysis:** Identify what and where the gaps are in transportation for vulnerable populations before, during, and after an emergency.

- **Coalition Building:** Support and strengthen partnerships between transportation providers, emergency managers, human service agencies, and vulnerable populations.

- **Preparedness:** Ensure the supply (providers/organizations) and demand (riders) are as prepared as possible to operate or function during an emergency.

- **Resource Identification:** Assess and distribute information about the availability of transportation resources in an emergency.

- **Coordination:** Develop a coordinated network to operate in an emergency.

- **Communication:** Ensure the coordination network and demand of transportation in an emergency is clearly communicated and comprehended by all relevant stakeholders.

The Emergency Transportation Provider Network (ETPN) is a project of RARET. In addition to having developed a set of core guiding operating principles for its members, the following guidance about what "emergencies" an ETPN would be applied to is available on the project's Frequently Asked Questions webpage and reproduced here:

What are the "emergencies" that ETPN would be applied to?

If an individual has an urgent, lifesaving need they should call 911.

However, for regional issues like snow events, extreme cold weather, wildfires, heat waves, earthquakes, pandemics, flooding, etc., there are often have an elevated needs for life-sustaining transportation. This can include things like aiding with access to shelters, facilitating evacuations, and collaborating to be ensure vital medical appointments like dialysis are not disrupted. ETPN is not equipped to provide emergency service such as ambulance and Emergency Medical Technicians (EMTs).

The scope for type of transportation trips may include, but is not limited to:

- Essential medical appointments

- Food access (grocery store meal delivery, food bank delivery)

- Shelter or transitional housing

- Return home from a destination

- Evacuation

- Serving non-eligible clients (e.g., Medicaid brokerage transporting non-Medicaid patients)

Additional Reading:

RARET and ETPN pages on the King County Mobility Coalition website. Emergency Transportation Provider Network (ETPN) Guiding Principles

RARET's coalition-based model: Addressing complex life-sustaining transportation during emergencies (Dean Syndor) is available on the National Institutes of Health, National Library of Medicine website. This paper discusses the work of RARET and the development of an emergency transportation provider network (ETPN). Methods to adapt RARET/ETPN model to other jurisdictions are suggested in the paper.

Personnel

A personnel policy manual is the best way to define and explain manager, employee, and volunteer relationships, present legal requirements, and outline expectations for a positive work atmosphere.

New personnel manuals and any revisions should always be reviewed by the volunteer driver program or sponsoring organization's legal counsel and approved by its governing board. Volunteer driver programs that are part of a local or Tribal government should also refer to that government's personnel policies.

While National RTAP's technical brief: Developing and Maintaining a Transit System Personnel Policy is not expressly written for volunteer driver programs, it does contain valuable information and guidance that may be of use to new programs. The following is adapted from the National RTAP brief and is a list of major topics and policies that are often covered in a personnel policy manual:

1) **Mission Statement** – A short statement identifying the reason that the organization or VDP was created.

2) **Statement of Purpose** – A statement to explain the purpose of the manual. For example, "to establish a uniform system of personnel policies within the organization and to outline procedures governing the behavior of all employees and volunteers")

3) **Volunteer Driver Selection Practices** – Describe the practices and procedures involved in selecting volunteers. Include specific qualifications, driving history requirements, and details about the selection process itself (application, review and interview processes, criminal history checks, proof of insurance, etc.). See *Section 4 - Establishing and Managing a Volunteer Driver Pool/Driver Selection*.

4) **Volunteer Status** – Include volunteer categories, classifications and job descriptions.

5) **Attendance** – Hours of work, absenteeism, and punctuality.

6) **Reimbursement** – The organizations policies on reimbursement of expenses like mileage and gasoline.

7) **Benefits** – As an example, some VDPs offer assistance with other services that the Sponsoring Organization provides to members.

8) **Organizational Standards** – The following is a list of topics and organizational policies that would be appropriate for inclusion in this section of the manual.

   a. Policies on Substance Abuse

   b. Harassment

   c. Standard of Dress

   d. Code of Ethics

   e. Code of Conduct

   f. Use of Agency Vehicles

   g. Political Activity

   h. Media Contact

   i. Release of Information

   j. Smoking

       k.   Computer/IT/Internet

       l.   Social Media

       m. Reporting Suspected Abuse (Neglect, Abandonment, and Exploitation)

       n.   Incident Reporting to include both motor vehicle accidents and other incidents involving a rider (falls, seizures, self-neglect or abuse).

       o.   Privacy Rights

9) **Personnel Actions** - The following is a list of topics that would be appropriate for inclusion in this section of the manual. See *Section 4 - Establishing and Managing a Volunteer Driver Pool*.

       a.   Training and Development

       b.   Performance Evaluations

       c.   Driver Review

       d.   Driver Suspension or Termination

       e.   Intervention

       f.   Exit Interviews

       g.   Medical Restrictions

       h.   Grievance Procedures

10) Documentation and Archiving Practices for Volunteer Personnel Files

Importantly, organizational policies, whether included in a personnel policy manual or not, must be provided to all volunteers. National RTAP's technical brief: Developing and Maintaining a Transit System Personnel Policy recommends conducting an in-person orientation, either one-on-one or in a group, and obtaining a signoff to verify receipt of the manual. Major revisions to the manual, including the addition of new elements, would necessitate additional orientation and signoff.

Need More Information, Examples, or Resources?

Section 8 – Forms (Examples and Templates), Policies, and Procedures contains model forms (templates), policies, and procedures that are composites of similar forms, policies, and procedures used by many of the contributing volunteer driver programs. The materials can be freely downloaded and edited; however, some forms should be reviewed by your legal counsel to ensure compliance with state and local laws and for liability purposes.

The *Appendix to Section 7 – Case Studies and Methodologies* also contains examples of the forms, policies, and procedures used by many of the volunteer driver programs that are included as case studies in this Toolkit.

Funding

Sponsoring Organizations should carefully weigh the contractual requirements of available funding sources. Sponsoring Organizations should check with their funding agencies to verify all of the requirements that apply to volunteer driver programs.

Many funding sources allow volunteer driver programs to use volunteer time as match, making it easier to secure funds that require a local match than a typical paid operation.

Local, State and Federal Funding

As discussed earlier in this section, state and federal funding may be available to volunteer driver programs and sponsoring organizations. In most cases, state and federal funding would be awarded to the Sponsoring Organization. The likely federal funding sources for a sponsoring organization that provides public transportation services in rural and Tribal areas are Section 5310 – Enhanced Mobility for Seniors and Individuals with Disabilities and Section 5311 – Formula Grants for Rural Areas. AmeriCorps - Senior Corps RSVP Grants Competition also provides funding for volunteer driver programs.

The Coordinating Council on Access and Mobility's (CCAM) Program Inventory identifies 132 federal programs that may provide funding for human services transportation for people with disabilities, older adults, and/or individuals of low income. The CCAM Federal Fund Braiding Guide also includes those federal programs listed in the CCAM Program Inventory.

Local funds or private funds in the form of sponsorships, individual contributions and community donations can have a dramatic impact on a program's ability to sustain administration and operating needs. The Fundraising by Volunteer Driver Programs Fact Sheet (2021) published as a part of Aging Forward's (formerly Shepherd's Center of America) Volunteer Driver Program TurnKey Kit (2021), includes a list of funding methods and sources relevant to volunteer driver programs.

As an example, Ride Connection, which serves the greater Portland region, receives funding from a combination of public and private sources. Public Funding includes TriMet, Metro, state and federal transportation dollars (FTA Section 5310 Enhanced Mobility of Seniors and Individuals with Disabilities), and the Statewide Transportation Improvement Fund (STIF). Ride Connection is able to weave these funds with private funding for their administration and operation needs. Read more about Ride Connection in *Section 7 – Case Studies and Methodologies*.

Coordination and Planning

Volunteer Driver Programs that are funded by Section 5310 – Enhanced Mobility for Seniors and Individuals with Disabilities and Section 5311 – Formula Grants for Rural Areas are required by the Federal law to be included in Coordinated Public Transit Human Services Transportation Plans.

- Requirements for Coordination and Planning are described in FTA Circular (FTA C) 9070.1H: Enhanced Mobility of Seniors and Individuals with Disabilities Program Guidance.
- Programs must be included in locally developed, coordinated plans and approved through a process that included participation by seniors, individuals with disabilities, representatives of public, private, and nonprofit transportation and human services providers and other members of the public.

- These coordinated plans identify the transportation needs of individuals with disabilities, older adults, and people with low incomes, provide strategies for meeting these needs, and prioritize transportation services for funding and implementation.

Volunteer Driver Programs with Section 5310 funding in urbanized areas must be included in the Metropolitan Transportation Plan (MTP) prepared and approved by the Metropolitan Planning Organization (MPO), the Transportation Improvement Plan (TIP) approved jointly by the MPO and the governor, and the State Transportation Improvement Plan (STIP) developed by a State and jointly approved by FTA and FHWA.

Subcontracted Services

A Sponsoring Organization may elect to contract with other organizations that provide volunteer transportation. Most funding agencies require prior approval of all subcontracts. Subcontractors will also need to comply with all of the funding agency's requirements including, but not limited to:

- Non-discrimination
- Americans with Disabilities Act (ADA)
- Insurance requirements
- Driver pre-screening requirements
- Driver training

Operating Across Borders

Operating across borders (jurisdictions), including state and county borders, is usually not an issue for volunteer driver programs. When compared to others transit services (i.e., fixed route and ADA complementary paratransit), they are often the most flexible transit service available.

County Borders

The service area of a volunteer driver programs or a sponsoring organizations is often determined locally or dependent on the funding source and contributed local match. *Section 7 – Case Studies and Methodologies* includes many examples of volunteer driver programs that operate across county borders. They include:

New Freedom/Compass IL Transportation Program currently covers 42 counties in Western Wisconsin and requires coordination across numerous agencies and organizations in the region.

Nevada RSVP operates in 15 of the 17 counties in Nevada: Carson City, Churchill, Douglas, Elko, Esmeralda, Eureka, Humboldt, Lander, Lincoln, Lyon, Mineral, Nye, Pershing, Storey, Washoe and White Pine. Service Coordinators work closely across counties to coordinate the resources needed to efficiently schedule a ride with one of Nevada RSVP's volunteer drivers.

Mobility Management

Mobility management is a customer-centered approach to designing and delivering mobility services. The Coordinating Council on Access and Mobility Technical Assistance Center (CCAM-TAC) is a national technical assistance center funded through a cooperative agreement with the Federal Transit Administration (FTA) and operated by the Community Transportation Association of America. The

CCAM-TAC website includes information and training that may be of value to new and existing volunteer driver programs. According to CCAM-TAC's [What is Mobility Management? web page](#), Mobility management:

- Encourages innovation and flexibility to reach the "right fit" solution for customers

- Plans for sustainability

- Strives for easy access to information and referral to assist customers in learning about and using services

- Continually incorporates customer feedback as services are evaluated and adjusted

Volunteer driver programs will likely want to seek out opportunities to partner with mobility management services in their area. Most regional planning organizations and some public transportation agencies include mobility management offices. Find out more about mobility management in the [Coordination and Mobility Management section of National RTAP's Transit Manager's Toolkit](#). Several of the programs included in *Section 7 – Case Studies and Methodologies* work with mobility managers.

- **SAINT** participates in the [North Front Range Metropolitan Planning Organization's (NFRMPO)](#) [RideNoCo](#) information hub. RideNoCo helps potential riders find the right mobility option for their needs. NFRMPO and RideNoCo work with transportation providers to find transportation options for riders in Northern Colorado. Their work includes the collection of data from riders and transportation providers.

- [King County Metro](#) has a contract with [Hopelink Mobility Management](#) to provide trip coordination and promotion for its [Community Van](#) program.

- The [WexExpress Mobility Coordination Office](#) provides transportation services through the **WexExpress New Freedom** Program for riders who need transportation options beyond those available by other WexExpress services to get to non-emergent appointments across Michigan.

Commercial Motor Vehicles

If the volunteer driver program service is covered by the [Federal Motor Carrier Safety Administration's (FMCSA)](#) definition of a Commercial Motor Vehicle, the Federal Registration process must be completed with the [FMCSA](#). See the [FMCSA's Do I Need a USDOT Number? website](#) for more information on commercial vehicles transporting passengers. Completion of this process may affect the levels of insurance that the volunteer driver program or sponsoring organization must carry and require other changes in the operation of the volunteer driver program.

Commercial motor vehicle (CMV) means any self-propelled or towed motor vehicle used on a highway in interstate commerce to transport passengers or property when the vehicle:

- Has a gross vehicle weight rating or gross combination weight rating, or gross vehicle weight or gross combination weight, of 4,536 kg (10,001 pounds) or more, whichever is greater; or

- Is designed or used to transport more than 8 passengers (including the driver) for compensation; or

- Is designed or used to transport more than 15 passengers, including the driver, and is not used to transport passengers for compensation; or

- Is used in transporting material found by the Secretary of Transportation to be hazardous under 49 U.S.C. 5103 and transported in a quantity requiring placarding under regulations prescribed by the Secretary under 49 CFR, subtitle B, chapter I, subchapter C.

The FMCSA maintains an online guide, the Motor Carrier Safety Planner, that is meant to assist CMV operators in understanding and complying with the Federal Motor Carrier Safety Regulations (FMCSRs).

Additional Reading on Other Types of Volunteer Driver Programs

- Independent Living Partnership (ILP) Transportation Reimbursement and Information Program (TRIP) Model. Video: Start a Volunteer Driver Service Today – TripTrak™ software

- ITN*AMERICA*, a national non-profit network of local transportation providers

- Victor Valley Transit (VVT), Hesperia, California VVT Transportation Reimbursement and Information Program (TRIP) is a self-directed, mileage reimbursement transportation service that complements public transportation. Metro Magazine, November 2018 Victor Valley's volunteer driver program supplements traditional service

- Hamline Midway Elders, St. Paul, Minnesota A part of Minnesota's Living at Home Network, one of 32 Living at Home Network providers with services that include Volunteer Drivers.

- GWarr Volunteer Driver Programs - Driver Training Toolkit – General Information Fact Sheet 2019, InfoGraph 2019

Section Resources

41 U.S.C. Section 8103 - Drug-free workplace requirements for Federal grant recipients

42 USC Section 14503 - Limitation on liability for volunteers

42 USC Section 14502 – Pre-emption and election of State non applicability

49 CFR Part 655 - Prevention of Alcohol Misuse and Prohibited Drug Use in Transit Operations and 49 CFR Part 655.4 - Prevention of Alcohol Misuse and Prohibited Drug Use in Transit Operations, Definitions

Aging Forward's (formerly Shepherd's Center of America) Volunteer Driver Program TurnKey Kit (2021) and Fundraising by Volunteer Driver Programs Fact Sheet (2021)

Area Agencies on Aging (AAA)

Arizona - Actions Against Volunteers, Qualified immunity; insurance coverage (Section 12-982).

Arkansas – Arkansas Volunteer Immunity Act, (ACA Section 16-6-102)

Community Action Agencies

Connecticut Department of Motor Vehicles

Section 2 – Volunteer Driver Programs

[Drive a Senior, Austin, Texas](#)

[Federal Motor Carrier Safety Administration (FMCSA)](#)- [FMCSA's Do I Need a USDOT Number? Website](#), [Definitions](#) and [Motor Carrier Safety Planner](#)

[Federal Volunteer Protection Act of 1997 (VPA)](#)

[Florida - Florida Volunteer Protection Act](#) (768.1355).

[Florida Highway Safety and Motor Vehicles](#)

Florida State Law: [Section 320.0848(1)(e) related to parking permits for persons with disabilities](#)

Federal Transit Administration - [5310 Funding Frequently Asked Questions](#), [Americans with Disabilities: Guidance website](#), [Drug and Alcohol Program website](#), [Section 5310 – Enhanced Mobility for Seniors and Individuals with Disabilities](#), [Section 5311 – Formula Grants for Rural Areas](#), [Section 5311 – Formula Grants for Rural Areas](#), [Coordinated Public Transit Human Services Transportation Plans,](#) and [FTA Circular 9070.1H: Enhanced Mobility of Seniors and Individuals with Disabilities Program Guidance](#).

Greater Wisconsin Agency on Aging Resources (GWaar)- [Volunteer Driver Insurance infographic 10-2023](#), [GWarr Volunteer Driver Programs](#) - [Driver Training Toolkit](#), [General Information Fact Sheet 2019](#), and [InfoGraph 2019](#)

[Hamline Midway Elders, St. Paul, Minnesota - Living at Home Network](#), and [32 Living at Home Network providers](#)

[HopeLink's Community Van Program](#), Redmond, Washington, [King County Metro](#), Seattle Washington, and [King County Mobility Coalition(KCMC)](#)

[Independent Living Partnership (ILP) Transportation Reimbursement and Information Program (TRIP) Model](#)

King County Mobility Coalition and the Eastside Easy Rider Collaborative's memo on [The Need for Medical Chaperones for Post-Sedation Transportation](#)

[Metro Magazine, November 2018 Victor Valley's volunteer driver program supplements traditional service](#)

[Missouri Department of Transportation's (MoDOT) List of Recommended Policies for Volunteer Driver Programs](#)

[National Center for Mobility Management (NCMM)](#)

[National Council of Nonprofits](#) webpages: [Running a Nonprofit](#), [Cybersecurity for Nonprofits, and State Associations of Nonprofits](#)

[Nonprofit Community Association Handbook, State of Alaska, Department of Commerce, Community and Economic Development (2020)](#)

[National Aging and Disability Transportation Center (NADTC), Community Engagement Toolkit: Essentials for Planning & Facilitating Meaningful Conversations](#)

[National Rural Transit Assistance Program (National RTAP)](#) - [ADA Toolkit](#), [Substance Abuse Awareness Training, Testing, and Compliance Technical Brief (2022)](#), [Transit Manager's Toolkit/Drug and Alcohol Programs](#), and [Developing and Maintaining a Transit System Personnel Policy Brief](#)

Section 2 – Volunteer Driver Programs

Nonprofit Risk Management Center (NRMC) Articles: Take Action on Risk: Make a Plan, Not a List - NRMC-Risk-Management-Essentials-Fall-2022-Newsletter, Transporting People: What to Consider - NRMC-Risk-Management-Essentials-Summer-2023-Newsletter, Volunteer Protection Act – Ten Years Later, October 2009, State Liability Laws for Charitable Organizations and Volunteers, What Basic Insurance Coverage Should a Nonprofit Consider?, and Risk on the Road: Managing Volunteer Driver Exposures

North Front Range Metropolitan Planning Organization's (NFRMPO) RideNoCo

Ride Connection, Portland, Oregon

Risk Management and Insurance, Arizona State University (ASU) Lodestar Center for Philanthropy and Nonprofit Innovation

Rural Health Information Hub (RHIhub), Volunteer Models for Rural Transportation website.

SAINT Volunteer Transportation, Fort Collins, Colorado

Texas Department of Transportation, Texas Rural Microtransit Guidebook, Develop a Branding, Marketing and Outreach Plan

Tips for Understanding Volunteer Insurance, Volunteers and Insurance Fact Sheet (2023) Wisconsin Office of the Commissioner of Insurance

Victor Valley Transit (VVT), Hesperia, California - VVT Transportation Reimbursement and Information Program (TRIP), and Metro Magazine, November 2018 Victor Valley's volunteer driver program supplements traditional service

Volunteers in Motion, Florida

Volunteer Driver Insurance in the Age of Ridehailing, AARP (September 15, 2020) By Jana Lynott, Public Policy Institute, Johanna Zmud, Gretchen Stoeltje, Todd Hansen, Tina Geiselbrecht, Chris Simek, Ben Ettelman, Texas A&M Transportation Institute & Wendy Fox-Grage

Washington Nonprofit Handbook, How to Form and Maintain a Nonprofit Corporation Washington State – 2022 Edition

Washington State Department of Licensing

Washington State Law: RCW 24.06.035 Indemnification, RCW 46.19.020 for Eligible Organizations

Washington – Liability of volunteers of nonprofit or governmental entities (RCW 4.24.670).

Washington – Private, Nonprofit Transportation Providers, Insurance (WAC 480-31-070)

WexExpress New Freedom Volunteer Driver Program - Rider Resources, Mobility Coordination Services, Become A Volunteer, Local News Coverage Video: The New Freedom Volunteer Driver Program Introduced On the four.

Wisconsin State Legislature – Limited Liability of Volunteers (181.0670)

Section 3 – Important Information About Riders

Photo credit: KFH Group

Volunteer driver programs and sponsoring organizations help to fill critical mobility gaps for people who live outside public transit service areas, need to access jobs or services outside public transit service hours, or need more personal or specialized services to travel. While some sponsoring or funding agencies require the service to be available to the general public, riders often include individuals with specialized transportation needs, such as older adults, persons with disabilities, and their personal attendants.

Riders of volunteer transportation networks typically have specialized transportation needs that cannot be met by traditional public transit providers. It may be that the rider's needs include pick up and drop off points that are outside of the regional transit system's service area or the rider requires more assistance with getting from their home to the curb than can be accommodated by an existing paratransit system.

Volunteer driver programs often have the flexibility to expand beyond typical trips to essential or basic (e.g., medical appointment, grocery store) services. For example, a rider might request a trip with multiple stops on the same day (e.g., 1. medical appointment --> 2. pick up medication --> 3. stop by grocery store --> 4. home).

| Medical Appointment | Pick Up Medication | Stop by Grocery Store | Home |

Depending on program capabilities, volunteer driver services may also extend services to trips for other "essential services" such as financial services, legal aid, or social and religious gatherings.

| Financial Services | Legal Aid | Social & Religious Gatherings |

Section 3 – Important Information About Riders

This section of the Toolkit contains important information on policies and practices related specifically to riders using volunteer driver programs.

Rider Eligibility

- Rider Registration

- Rider Information and Records

- Rider Identification

Communication with Riders

- Information Accessibility

- Rider Expectations and Policies

Children

Rider Surveys

Rider Grievances

Section Resources

Rider Eligibility

It is important to be sure that existing and potential riders are made aware of any eligibility requirements. Rider eligibility requirements vary from program to program and are often driven by funding sources. The importance of having written policy around rider eligibility is discussed in more detail in *Section 2 - Volunteer Driver Programs*. Eligibility requirements are highlighted in each of the case studies included in *Section 7 – Case Studies and Methodologies*. The eligibility requirements for four of those programs are described below.

- **SAINT** serves older adults (60 years or older) and younger adults who cannot drive due to disability. The program is not able to provide rides for people who use a wheelchair. Rides are free for individuals 60 years or older.

- While almost 100 percent of **Volunteers in Motion**'s clients are older adults, eligibility is determined based on lack of ability rather than financial status. The program collaborates with other local transportation organizations and refers individuals to appropriate services when necessary.

- **WexExpress New Freedom** does not impose strict eligibility restrictions; however, most passengers are older adults (60 years or older) or veterans. A smaller number of individuals with disabilities, including those receiving services through the Michigan Department of Health and Human Services (DHHS), also utilize the service.

- **King County Metro Community Van** is open to all members of the public for non-commute group trips ranging from two to eleven passengers. There are no age or income restrictions; however, youth under 13 must be accompanied by an adult.

Rider Registration

Volunteer driver programs should register all riders receiving service to ensure eligibility and maintain proper records. Some funding agencies require specific information regarding riders. All riders, including escorts, attendants and children, should be registered separately. The information collected in rider registration may be used to:

- Determine eligibility specific to funding sources available
- Provide emergency medical information, including, but not limited to:
  - Name and phone number of emergency contact person
  - Name and phone number of personal physician
  - Identify the most appropriate mode of transportation
  - Provide necessary data to funding agencies

See *Section 6 - Program Records* for more information on this topic. A Rider Registration template is included in *Section 8 - Forms (Examples and Templates), Policies, and Procedures*.

Rider Information and Records

Volunteer driver programs and sponsoring organizations must securely maintain rider records. Rider information must be collected and properly maintained using a database or an adequate system done by hand if the agency does not have access to a computer. Programs primarily use rider information for reporting purposes. Individual volunteer driver programs and sponsoring organizations may require additional information for specific program purposes. Programs must store rider files securely to maintain confidentiality. See *Section 6 - Program Records* for a more detailed discussion on this subject and *Section 7 – Case Studies and Methodologies* for examples.

A suggested list of rider information to be included in program rider records follows:

- Rider's Name
- Address
- Phone number
- Age
- Income level
- Medicaid and/or other specific program eligibility
- Mobility information (i.e., uses a wheelchair, cane)
- Disability information (i.e., cerebral palsy, legally blind)
- Height and weight of children
- Name, address and phone number of emergency contact

In the event of an emergency, this information can also be valuable. See *Emergency Management* in *Section 2 - Volunteer Driver Programs* for more information on this topic.

Rider Identification

Riders should be encouraged to have photo identification, either in the form of a driver's license or state identification card. The state agency responsible for issuance of state identification cards can differ from state to state. The following are examples of where to locate state identification card information:

- In Washington, the [Washington Department of Licensing](#) operates a [Get an ID card website](#) that provides a step-by-step guide on how to apply for a Washington state identification card, includes both a standard ID or enhanced ID (EID).

- In Texas, the [Texas Department of Public Safety](#) provides instructions on how to apply for an ID card on its [How to Apply for a Texas Identification Card website](#).

Communication with Riders

Volunteer Driver Programs will want to use a wide variety of outreach methods (e.g., flyers, rack cards, service guides, social media) to ensure that their service policies and guidelines are readily available to current and prospective riders. Like other transit programs, volunteer driver programs can list the responsibilities they expect from their riders on their website and in their print materials. See more on the topic of Community Outreach in *[Section 2 - Volunteer Driver Programs](#)*.

Information Accessibility

Volunteer driver programs and supporting organizations are responsible for meeting federal, state, and local information accessibility requirements. To ensure compliance with applicable information accessibility requirements, a careful review of all program funding source documents is strongly recommended. Materials should be available in large font and alternative formats and use accessibility guidelines. Your website should be accessible for those who use screen readers, or navigate the webpage without a mouse. Programs will want to ensure that all materials are accessible by riders who speak languages other than English.

[National RTAP's ADA Toolkit](#) contains valuable information, guidance, resources, and examples that will be helpful to volunteer driver programs. Resources include:

- [Web Accessibility Initiative (WAI)](#) and [Web Content Accessibility Guidelines (WCAG)](#). The [WCAG 2.1 at a Glance](#) web page is a good place to learn the basics of making web content more accessible to people with disabilities

- The [Section508.gov website](#) includes online training and guidance on how to make accessible documents and presentations.

- The basics of web accessibility can also be found on the [WebAIM Introduction to Web Accessibility website](#).

- The [Rider Assistance and Customer Service section of the ADA Toolkit](#) provides an overview of rider assistance and sensitivity requirements under the U.S. Department of Transportation (DOT) Americans with Disabilities Act (ADA) regulations, as well as good customer service practices and tips for serving riders with various disabilities.

The [Website Accessibility](#) page within the National RTAP Technology Tools Support Center includes additional discussion and links to additional resources on the requirements of agencies receiving federal funds (such as Section 5311) to ensure nondiscrimination in providing information to the public.

Rider Expectations and Policies

In addition to the program's policies about requesting service, pickup times, and cancellations, King County Metro Community Van's Rider Welcome Packet includes guidance on what types of support riders may expect from their volunteer driver (e.g. assistance with loading and transporting grocery bags or other purchases, door through door service). These materials are available in full in the *Appendix to Section 7 - Case Studies and Methodologies*.

hopelink
hopelink.org

King County METRO
Community Van

RIDER EXPECTATIONS & POLICIES

01 **2 Business Days' Notice for a Request**
We need at least **2 business days' notice** for a ride request. We cannot accept same-day requests. Try to request your ride as soon as possible. A week or more notice increases the chances of securing an available driver. Please provide **full names and contact information for all riders in your request. Do not contact volunteers directly to request trips.**

02 **Rides are not Guaranteed**
Rides are filled based on volunteer drivers' availability and cannot be guaranteed. We will do our best to secure a driver for your ride request. If you need help finding other transportation resources, contact our **Transportation Resources Line:** mobility@hopelink.org or 425-943-6760

03 **15-minute Pickup Window**
When the Community Transportation Coordinator schedules your ride, they will email you a confirmation with the pickup location, the pickup time, and destination location. Double check these details. Please be respectful of volunteer drivers' time. Be ready at the pickup location at the time of your scheduled ride. The driver may stay for a **15-minute grace period, and then they may leave if the rider is not present.** The ride will be cancelled.

04 **Last-Minute Cancellations or Changes**
Need to make an urgent cancellation or change to your ride the day of? **If you are able, please contact your volunteer directly at least 2 hours before your scheduled ride.** Community Transportation Coordinators are only available during business hours Monday-Friday. We understand emergencies happen, but please try to communicate changes as soon as possible.

05 **Volunteers ONLY Drive**
Volunteers **only** drive riders to and from the designated pickup, destination, and drop-off locations. Drivers may help with securing a wheelchair or accessibility items. They are not expected to carry luggage, bags, or other items. **Please do not ask your driver for money or to make purchases.** Riders pay parking fees and all other costs on their trip besides gas and tolls. **Tipping drivers is not expected** and most of our volunteers will turn down monetary tips. If you want to give them a thank you, **consider a card or small gift!**

Photo credit: King County Metro/Hopelink Community Van

In addition to rider responsibilities, Ride Connection's Rider Service Guide includes reminders about keeping personal records up-to-date, its policy about traveling with animals, and a list of prohibited activities. This Guide is available in full in the *Appendix to Section 7 - Case Studies and Methodologies*.

Rider Responsibilities

HELP US UPDATE YOUR PERSONAL RECORDS

Please call our Service Center (503) 226-0700 when there are changes to your:

- Address, Phone number, Email address
- Emergency Contact Name or Phone number
- Health/Mobility that affect your transportation needs
- Type of Mobility device used during transport
- Need for a Personal Care Attendant

CUSTOMER RESPONSIBILITIES

- Please be ready to go at least 10 minutes before your scheduled pickup time at your home. For your return trip, please be ready at your scheduled pickup time, but note the driver's arrival time may be up to 30 minutes after the scheduled time.
- Make sure there is a clear path to the entrance of your home so the driver has easy access. Fasten your seatbelt or request help from the driver, or show the driver a Certificate of Safety Belt Exemption from the DMV.
- Provide a safety seat for children weighing less than 40 lbs. who are traveling with you and secure them in the vehicle. See additional details regarding seat safety laws below.
- Limit the number of grocery bags to 3 unless you've contacted the Service Center to make previous arrangements for help with additional bags.
- Keep carry-on items out of the vehicle's walkways and away from doors.
- Use headphones when listening to audio devices.
- Treat drivers and other passengers respectfully.

PROHIBITED ON VEHICLES

Smoking, open food and beverage containers, littering, disruptive or threatening behavior, and weapons.

TRAVELING WITH ANIMALS

A service animal trained to assist with tasks may accompany you in the vehicle. The animal must remain under your control. You may bring a pet or emotional support animal on the vehicle if it is in a secure carrier.

5

Photo credit: Ride Connection

Children

Many volunteer driver programs and sponsoring organizations choose to require that an adult, other than the volunteer driver, accompany riders under the age of 11. Other transit systems allow children, ages six and over, to ride unaccompanied. To avoid confusion for riders and drivers, volunteer driver programs should have written policy and guidance on the transport of children.

For example:

King County Metro Community Van's Rider Welcome Packet includes Expectations for Youth Riders and a link to Community Van's Child Rider Consent Form. These materials are available in full in the *Appendix to Section 7 - Case Studies and Methodologies*.

Photo credit: King County Metro/Hopelink Community Van

Ride Connection's Rider Service Guide states the program's policy - "Children under 8 years must be accompanied by a responsible party." – and includes applicable child safety seating laws. The Guide is available in full in the *Appendix to Section 7 - Case Studies and Methodologies*.

TRAVELING WITH CHILDREN

Children under 8 years must be accompanied by a responsible party. Children weighing less than 40 lbs. must use a child safety seat that complies with Oregon state regulations. See below for details. You are responsible for providing a safety seat and for securing the child within the vehicle.

NOTE: When scheduling a ride for a child, please tell the Service Center so that we can schedule your ride to an appropriate vehicle. You will not be able to leave the safety seat in the vehicle when you arrive at your destination.

CHILD SAFETY SEAT LAW
Child passengers must be restrained in child safety seats until they weigh forty pounds or reach the upper weight limit for the car seat in use. Infants must ride rear-facing until they reach two years of age unless the child turned age one prior to May 26, 2017.

BOOSTER SEAT LAW
Children over forty pounds or who have reached the upper weight limit for their forward-facing car seat must use a child seat with harness or a booster to 4'9" tall or age eight and the adult belt fits correctly.

REAR SEATING FOR CHILDREN
There is no Oregon law specifically prohibiting children from riding in the front seat of passenger vehicles. However, a rear-facing infant seat cannot be placed in a front seating position that is equipped with an airbag because this would violate Oregon's requirement for "proper use" of a child safety seat. There is a national "best practice recommendation" calling for rear seating through age twelve.

DRIVER ASSISTANCE

Drivers can assist with the following:
- Guide you from the door of your home or destination to the vehicle and back again.
- Provide non-weight-bearing physical assistance with balance, climbing steps, helping you get in and out of the vehicle, etc.
- Help fasten your seat belt, secure an oxygen tank and mobility device (walker, wheelchair, scooter) if needed.
- Carry grocery bags into the vehicle and to the door of your home. There is a 3 bag limit unless help with additional bags was requested in advance when scheduling a trip.

6

Photo credit: Ride Connection

For additional information on training for drivers, see Car Seats and Child Securement in *Section 4 - Establishing and Managing a Volunteer Driver Pool*.

Rider Surveys

Rider surveys should be conducted annually to assess service quality and identify areas for improvement. Surveying riders will help improve the services provided by the volunteer driver program. A Volunteer Transportation Rider Survey template is included in *Section 8 - Forms (Examples and Templates), Policies, and Procedures*.

Survey Best Practices:

- Use multiple distribution methods (paper, online, phone interviews).
- Include both quantitative and qualitative questions.
- Analyze responses to improve service quality.

Example Question Topics:

- Overall satisfaction with ride experience.
- Ease of scheduling and availability of rides.
- Courteousness and professionalism of volunteer drivers.

Rider Grievances

Occasionally riders will have grievances about aspects of the program, including restrictions and denial of services or the quality of the service they received. Volunteer driver programs and sponsoring organizations should have both procedures and forms for handling these situations. Riders' specific complaints can be recorded on an Incident Report. However, it is also very important that volunteer driver programs and sponsoring organizations document all complaints and what actions were taken as a result.

It is recommended that volunteer driver programs have a clear rider grievance or complaint process in place that includes the timeframe for a resolution, steps in the appeals process, and follow-up procedures for unresolved complaints.

1) **Complaint submission:** Riders submit grievances through a written or verbal complaint form.

2) **Internal review:** Program administrators review the complaint and assess necessary actions.

3) **Resolution and Follow-up:** A formal response is provided within a set timeframe (e.g., 10 business days).

4) **Appeal process (if applicable):** If unresolved, riders may appeal through a designated review panel.

In some cases, funding agencies will be responsible for investigating and following specific policies and procedures when responding to rider complaints. It is important that volunteer driver programs and sponsoring organizations be familiar with funding agency requirements regarding reporting of complaints. See *Funding* in *Section 2 - Volunteer Driver Programs* of this Toolkit. A sample Transit

Complaint Policy and Rider Grievance template are included in *Section 8 - Forms (Examples and Templates), Policies, and Procedures*.

Section Resources

Green Mountain Transit (GMT)

HopeLink's Community Van Program

King County Metro Community Van's Rider Welcome Packet, Community Van's Child Rider Consent Form

National RTAP's ADA Toolkit, Rider Assistance and Customer Service

National RTAP Technology Tools Support Center, Website Accessibility

Ride Connection's Rider Service Guide

Section508.gov website

Texas Department of Public Safety, How to Apply for a Texas Identification Card website

Washington Department of Licensing, Get an ID card website

Web Accessibility Initiative (WAI), Web Content Accessibility Guidelines (WCAG), WCAG 2.1 at a Glance web page

WebAIM Introduction to Web Accessibility website.

Section 4 – Establishing and Managing a Volunteer Driver Pool

A well-trained, enthusiastic driving staff is essential for a successful volunteer transportation program. Whether a volunteer uses an agency-owned vehicle or a personally owned vehicle (POV), they are responsible for the safety and well-being of all riders.

Photo credit: Drive a Senior/Chariot

Section 4 – Establishing and Managing a Volunteer Driver Pool

There are two important features to remember when developing or managing a volunteer driver program workforce. Those are:

1) All volunteer drivers, whether using agency vehicles or their personal vehicles, must be appropriately trained to safely carry out their responsibilities.

2) All volunteer drivers who operate agency vehicles should follow the same policies and procedures as paid drivers (if any) operating similar vehicles for a sponsoring organization.

Volunteer driver programs and sponsoring organizations have the responsibility of assuring that transportation volunteers and staff have the tools necessary to be successful in their positions. Success depends on proper selection and management of both volunteer and paid drivers including quality program orientation, training, and evaluation. See *Section 2 - Volunteer Driver Programs/Personnel Policies* of this Toolkit.

This section of the Toolkit includes the following subsections:

Volunteer Drivers

- Recruiting Drivers
- Specific Qualifications
- Driving History Requirements
- Driver Selection
- Retaining Volunteer Drivers

Driver Duties

- Assist Riders
- Trip Schedules
- Communication with Program Managers
- Program Safety Policies

Driver Performance

- Driver Review Process
- Driver Suspension or Termination
- Reasons for Intervention
- Medical Restrictions
- Performance Evaluations
- Mixing Volunteer with Paid Employees
- Departure of Volunteer Drivers
- Volunteer Driver Identification

Driver Conduct

- Following Traffic Laws

- Controlled or Illegal Substances
- Theft, Violence, and Gross Negligence
- Confidentiality, Conflict of Interest, Code of Conduct, and Ethics

Training Volunteer Drivers

- What About the Cost of Training?
- Documentation is Important
- Why use a Driver Training Checklist?
- Recommended Types of Training

Section Sources

Volunteer Drivers

Volunteer driver programs should maintain objective, non-discriminatory recruitment and selection processes.

Recruiting Drivers

Recruiting drivers is essential for any volunteer driver program and must be continuous.

How and Where to Advertise for Volunteers

In addition to having an online and media presence, successful volunteer driver programs seek out local opportunities to advertise for volunteers. Volunteer recruitment sources can include faith-based organizations, local businesses with community engagement initiatives, retired professionals' networks, and regional news sources. Local churches, senior centers, and community centers often include volunteer opportunities. Volunteer drivers sharing their stories, word of mouth, and advertising for volunteers on agency vehicles are also effective strategies for driver recruitment.

On a national scale, AARP provides a space for members to recruit volunteers, including volunteer driver opportunities, on its AARP Create the Good website.

Some programs strive to recruit drivers who speak languages other than English that are prevalent in their region. As an example, see Drive a Senior/Chariot's 2025 Volunteer Recruitment – Espanol YouTube video.

In most cases, potential volunteer drivers should begin the process by filling out a volunteer driver application form. A sample Volunteer Driver Job Application (Washington State) is included in *Section 8 - Forms (Examples and Templates), Policies, and Procedures* of this Toolkit..

Specific Qualifications

To protect the safety of passengers, minimum volunteer driver qualifications should be established. These include but are not limited to:

1) The driver should be at least 21 years of age. (The volunteer driver program or its sponsoring organization, as appropriate, may choose a minimum age for drivers based on state and local laws or insurance.)

2) The driver must possess a valid driver's license appropriate for the type of vehicle to be operated.

3) A driver history report must not include citations or violations that exceed the threshold established by the volunteer driver program or its sponsoring organization. See the section below on *Driving History Requirements.*

4) The driver must provide a minimum of two excellent references. As an example, a sample Volunteer Driver Reference form is included in *Section 8 - Forms (Examples and Templates), Policies, and Procedures*.

5) The driver must be able to operate the assigned equipment.

6) The driver must be willing to attend the training courses required and to follow the volunteer driver program and sponsoring organization's policies.

7) The driver's criminal history background check must be free of a record of crimes against others. As an example, see the Washington State Department of Social and Health Services Secretary's List of Disqualifying Crimes.

8) A volunteer driver information check against the registries available on the National Sex Offender Public Website (NSOPW), which includes registries for states, territories, and tribes, must be free of results.

9) The driver must have completed a self-declared form indicating the ability to physically carry out the essential job functions as listed in the job description. A sample Volunteer Driver Statement of Medical Condition form is included in *Section 8 - Forms (Examples and Templates), Policies, and Procedures*.

10) The driver must not have an uncontrolled chronic illness such as epilepsy, diabetes, heart, or respiratory problems. When indicated, a driver must be willing to provide a physician's statement qualifying them as physically able to drive. If the driver does not have medical insurance, the volunteer driver program or its sponsoring organization may choose to pay for the physical exam. Some programs may choose to use Federal Motor Carrier Safety Administration (FMCSA) medical forms (used for Commercial Driver's License applications) for this purpose. FMCSA's Medical Applications and Forms website includes a Medical Examination Report Form and a Medical Examiner's Certificate. *Section 8 - Forms (Examples and Templates), Policies, and Procedures* includes a sample Volunteer Driver Medical/Physical Release form.

11) The driver must not abuse alcohol, drugs, and/or medication.

12) The driver must be willing to sign and comply with the volunteer driver program and a sponsoring organization's applicable policies covering confidentiality, ethics, and conflicts of interest, as appropriate.

Volunteer driver program and sponsoring organizations may also want to consider including a Caregiver Background Check. Some contracts with managed care organizations or healthcare entities may require them, and it's a good practice for those who are in unsupervised contact with vulnerable people.

Driving History Requirements

To protect the volunteer driver program and its sponsoring organization, as appropriate, and the passengers they serve, minimum driving history information should be gathered. To determine the eligibility of volunteer drivers, based on driving history, volunteer driver programs are encouraged to use a system that objectively evaluates a volunteer applicant's driving history.

Washington State's Driver Selection Guidelines and Selection Standards are used as an example of how a driving history may be used to evaluate an applicant's driving history. A periodic check of each driver's license record is done at least annually. All drivers are informed of these standards for acceptable drivers and their responsibility to immediately report any citations or accidents, whether in their private auto or in a program vehicle.

The Selection Standards list (chart on the right) is intended as a guideline in selecting new volunteer drivers and for evaluating the ongoing records of registered drivers.

To enable an objective evaluation of each applicant's record, a point system was adopted. The system works by running the Washington Department of Licensing record for the applicable driver and comparing any citations or accidents that have occurred within the last three (3) years with the list of point values. The driver's five-year record may also be reviewed in determining potential risk.

Points	Citation
1	Defective or problem equipment
1	Not at fault accident
1	No insurance in vehicle; expired insurance
1	Improper child restraint
1	Headphones or illegal TV
1	Expired license; license not on person
2	Failure to signal
2	Illegal turns
2	Failure to yield or stop
2	Speeding (5 to 9 over)
2	Violation of school bus sign
2	Impeding traffic (traveling too slowly)
2	Following too closely
2	Illegal lane change; improper lane travel
3	Illegal passing
3	No insurance
3	Speeding (10 to 14 over)
3	Failure to appear
3	At fault accident
3	No valid license
4	Speeding (15 or over)
5*	Driving with license suspended or revoked
5*	Hit & run (misdemeanor)
5**	Eluding a police vehicle
5**	DWI, DUI, Reckless (negligent driving)
5**	Vehicular assault/homicide, hit & run (felony)
5**	More than one accident in 3-5 years
5	Unsatisfied bench warrant

* Disqualified if in last five (5) years.
** Disqualified if in last ten (10) years.

The total points are compared with the **acceptable standard of four (4) or fewer points.** Each citation is counted separately, even if the driver received more than one citation for the same incident. A person with a score above the recommended point level is not allowed to drive as a volunteer driver without specific approval from the manager.

The potential volunteer driver must also meet all other standard requirements. *Section 8 - Forms (Examples and Templates), Policies, and Procedures* includes model Volunteer Driver Selection Guidelines and a Volunteer Driver Selection Standards list.

Driver Selection

As providers of services to vulnerable populations, volunteer driver programs and sponsoring organizations are responsible for following a proper selection process. This will minimize the chance

of being challenged about those processes. The driver selection process should include the following:

1) Prospective volunteer reads and becomes familiar with the job description. Job descriptions may be available online or at the volunteer driver program or sponsoring organization's offices. *Section 8 - Forms (Examples and Templates), Policies, and Procedures* includes a sample Volunteer Transportation Driver POV (Job Description) and Volunteer Driver Essential Functions.

2) Applicant completes a position application online or at the volunteer driver program or sponsoring organization's offices. *Section 8 - Forms (Examples and Templates), Policies, and Procedures* includes a sample Volunteer Driver Job Application.

3) Applicant completes a Statement of Understanding online or at the volunteer driver program or sponsoring organization's offices. *Section 8 - Forms (Examples and Templates), Policies, and Procedures* includes a sample Volunteer Driver Statement of Understanding (Washington State).

4) Manager reviews the application.

5) Manager conducts a personal interview.

6) Manager conducts reference checks.

7) A report from the state agency or department responsible for supplying in-depth information about an individual's driving record is obtained. This information is used to complete the rating system discussed in the *Driver History Requirements* section above. Washington State is used here as an example of how to request an applicant's driving record, Driving Record Request; Washington State Department of Licensing.

8) A Criminal Record Check that covers the maximum time possible through the state agency responsible for providing criminal history convictions. Fees will vary from state to state, and some states will provide records at no cost to eligible non-profit organizations. As examples:

   a. In Washington, the Washington State Patrol Identification and Criminal History Section (WASIS) operates an online system, WATCH (Washington Access To Criminal History), covers two types of criminal history checks which can be done online or by mail. The first check is a Criminal History Record based on name and date of birth. The second is a Child and Adult Abuse Record. This check is free to eligible non-profit organizations. Finger print checks are also available.

   b. In Texas, the Texas Department of Public Safety operates a Crime Records Division Public Website. This site also covers three types of check requests: A Criminal History Conviction Name Search (Under Texas law, deferred adjudication and conviction records are considered public information and may be made available to the general public.), Texas Sex Offender Registry, and Fingerprinting Services (Fingerprint Applicant Services of Texas (FAST) offers a complete suite of electronic fingerprinting services across the state designed to provide authorized entities with the capability to obtain fingerprint-based criminal history checks for job applicants, licensees, volunteers, etc.).

9) A Federal Bureau of Investigation National (FBI) Criminal Records Check should be done if the applicant has not lived in the state for a certain number of years. Volunteer driver programs and sponsoring organizations should work with funding agencies to follow

required background check completion based on funding agency requirements. The FBI check should be done in addition to a Criminal History Check. It is suggested that local law enforcement agencies be used to properly complete the fingerprints. The *FBI blue form (FD 258)* is available through law enforcement authorities, but is not downloadable. The FBI will not take copies. The FBI provides information that the person has, or has not, committed disqualifying crimes. *Section 8 - Forms (Examples and Templates), Policies, and Procedures* includes a copy of the *FBI Fingerprint Form (Sample)*.

10) If the driver will be using their own vehicle, the applicant's proof of insurance (ACORD 23 Vehicle or Equipment Certificate of Insurance Form) should be checked for compliance with program standards. A copy of the ACORD 23 Form should be placed in the driver's file (when established).

11) If the prospective driver does not own an automobile then they must have an insurable record. An insurable record means that the prospective driver meets specific criteria set by the program's insurance company to qualify for coverage under an auto insurance policy. Criteria may include: age, driving record, license status, and experience.

12) Once all steps have been completed, the applicant is selected, and a driver file is established.

Retaining Volunteer Drivers

Retention of drivers is crucial to the stability of a volunteer driver program. Volunteer drivers should be celebrated and recognized. Whenever possible, volunteer drivers should be given the assignments they want and prefer. Managers should reach out to regular volunteers on a regular basis to ensure that their observations, ideas, and concerns are heard. Additional incentives to retain drivers may include hosting volunteer appreciation events, mileage reimbursement, and having flexible scheduling options.

In regard to mileage reimbursement, volunteer driver programs vary based on financial and other considerations. If resources are available, drivers can be reimbursed, offsetting some of their costs and helping to retain them as volunteers. Several of the programs included in *Section 7 – Case Studies and Methodologies* (**Nevada RSVP**, **Ride Connection, SAINT**, **Drive a Senior**, and **WexExpress New Freedom**) offer mileage reimbursement to incentivize volunteer driving, with varying rates and conditions.

Driver Duties

Drivers are the public face of a volunteer driver program. As stated in the introduction to this Toolkit, volunteer driver programs are a critical component of many public transportation systems as well as human services transportation, offering specialized or expanded services beyond those typically available through general public transit services and providing a more personal and one-to-one transportation service for customers who may require additional assistance. While individual volunteer drivers may be selective about their schedules or routes and their responsibilities may vary from program to program, the essential volunteer driver duties are listed below.

Assist Riders

Volunteer drivers must be trained to competency and be comfortable with assisting passengers in and out of vehicles. Depending on the program's capabilities, eligibility requirements, and any additional services offered, drivers may be asked to assist with parcels, mobility devices, and provide door to door or door through door service. Information, guidance, and training resources to assist

with preparing volunteer drivers for duty to may be found under *Training Volunteer Drivers* later in this section and in *Section 3 - Important Information About Riders*.

Follow Trip Schedules

Trip scheduling is an essential component of a volunteer driver program. Following assigned trip schedules is key to the safety and success of the program. For more information about trip schedules see *Section 5 - Day-to-Day Operations/Scheduling*.

Communicate with Program Managers

Volunteer drivers must maintain communication with program managers or coordinators. *Section 2 - Volunteer Driver Programs/Policies* speaks to the specific scenarios that may call for the driver to reach out to a manager immediately such as incident reporting; both motor vehicle accidents and other incidents involving a rider (falls, seizures, suspected abuse, neglect, abandonment, and exploitation). As discussed earlier in this section, drivers should also feel comfortable sharing their observations, ideas, and concerns with management.

When to Report an Issue

Suspected abuse of children or vulnerable adults must be reported. If abuse is suspected, this information must be conveyed to the manager, but not to other drivers, family, or friends. Some states require drivers to be mandatory reporters if they suspect neglect or abuse. Programs will want to be aware of any state requirements. Also see *Section 8 - Forms (Examples and Templates), Policies, and Procedures* for reporting examples.

Disqualification of Drivers

Occasionally, a new volunteer will be unable to successfully complete the required training courses, or a tenured driver will fail to maintain prescribed rider relations or safety standards.

Complete, objective, written documentation is an essential part of any disqualification process. Volunteer driver programs and sponsoring organizations must be able to objectively defend their decisions when challenged.

Disqualifications that prevent a volunteer from working as a driver include but are not limited to:

1) Not in possession of a valid, appropriate, driver's license and insurance.
2) Physical restrictions that prevent safe and proper handling of riders based on essential job functions listed in the job description.
3) Criminal history includes disqualifying crimes. As an example of how to compile a list of disqualifying crimes in individual states, *Section 8 - Forms (Examples and Templates), Policies, and Procedures* includes guidance on locating Volunteer Driver Disqualifying Crimes (Washington State).
4) Inability to read or comprehend written materials, including road maps.
5) Reporting to training or work under the influence of a controlled substance, alcohol or medications that affect driving abilities. (Violations of Drug Free Workplace or other applicable Drug and Alcohol Policies based on the volunteer driver program or sponsoring organization's policies.)
6) Unwillingness to perform essential job functions.
7) Failure to adequately respond to instructions.

Follow Program Safety Policies

Once appropriately trained to safely carry out their responsibilities, all volunteer drivers, whether using agency vehicles or their personal vehicles, must follow the program's safety policies.

Driver Performance

Driver performance is as important for volunteer driver programs as it is for any transit program. In addition to the driver qualifications, requirements, and selection processes discussed above, volunteer driver programs should have policies and processes in place to monitor driver performance on a regular basis. All driver performance policies and processes should be included in volunteer driver handbooks. See *Section 2 - Volunteer Driver Programs/Personnel Policies*.

Driver Review Process

In the event that a driver is involved in any moving violation or collision (whether or not an agency client was in the vehicle at the time of the moving violation or collision) the manager must be notified by the volunteer driver. The manager should determine whether or not a review is warranted. The following process is recommended for review of both moving violations and collisions:

1) The manager will request a written explanation about the moving violation or collision.

2) The manager will request a copy of the moving violation or police report of the collision.

3) The manager will review the driver's file including passenger comments, moving violations, and collision information and make a recommendation on the driver's continued eligibility or the need for additional training.

   a. When reviewing eligibility, the manager considers prior incidents that include moving violations and collision/s and severity of the incidents

   b. Drivers that have a single minor incident should have additional mandatory training related to the incident.

   c. Drivers that have a severe incident or more than one incident (of any kind) within a year should be reviewed for eligibility.

   d. When reviewing eligibility, the manager considers driving-related complaints or the need for additional training. The suggested maximum is three complaints or fewer, based on the severity of complaints.

   e. The suggested method for obtaining rider comments is to randomly call riders that have been transported by the driver being reviewed.

Driver Suspension or Termination

Occasionally, drivers must be suspended or terminated as a result of violations of the volunteer driver program or sponsoring organization's policies or complaints received by riders. Grounds for termination include but are not limited to:

1) Any time a current driver does not meet the requirements to be a new driver.

2) Theft.

3) Violence.

4) Reporting to work under the influence of a controlled substance, alcohol, or medications that affect driving abilities, based on the standards of the Drug Free Workplace Act.

5) Reporting to work under the influence of medication that has not been reported to and approved by the volunteer driver program or sponsoring organization.

6) Management may consider driving related complaints or the need for additional training. The suggested maximum is three complaints or fewer, based on the severity of the complaints.

7) Violations of the Drivers Code of Conduct. *Section 8 - Forms (Examples and Templates), Policies, and Procedures* includes a model Driver Code of Conduct.

8) Suspension or loss of driver's license or insurance.

9) Violation of program confidentiality or conflict of interest policies.

10) Repeated collisions or a single serious collision.

11) False documentation of program records.

12) Violation of volunteer driver program or sponsoring organization's Ethics Policy. *Section 8 - Forms (Examples and Templates), Policies, and Procedures* includes a model Code of Ethics.

13) Violation of the volunteer driver program or sponsoring organization's Harassment Policy. *Section 8 - Forms (Examples and Templates), Policies, and Procedures* includes a model Policy on Harassment.

Reasons for Intervention

Volunteer driver programs and sponsoring organizations may choose an intervention program for less serious offences than those listed above. Such offences include, but are not limited to:

1) Moving violations (depending on severity).

2) Acquiring additional points on any evaluation scale used by the volunteer driver program or sponsoring organization. See *Driving History Requirements* above. *Section 8 - Forms (Examples and Templates), Policies, and Procedures* includes a model policy on Selection Standards.

3) Rider complaint about driving performance or rider relations abilities.

4) Staff or driver observation of changes in the ability to perform essential job responsibilities.

5) Improper program documentation.

Medical Restrictions

If a volunteer's driving has been restricted for any medical reason, the driver should be responsible for informing the program manager. A written physician's release should be required prior to returning the volunteer to driving. *Section 8 - Forms (Examples and Templates), Policies, and Procedures* includes a sample Medical/Physical Release.

Performance Evaluations

Performance evaluations are important. Volunteer driver programs and sponsoring organizations must have a plan for conducting regular performance evaluations for all volunteer drivers. Evaluations serve as an important tool for the volunteer driver program, a sponsoring organization, and volunteer. This provides an excellent opportunity for the manager to provide feedback to the volunteer about their performance; and provide the volunteer an opportunity to address issues they may be encountering. *Section 8 - Forms (Examples and Templates), Policies, and Procedures* includes a sample Driver Evaluation Form.

Factors to consider when establishing an evaluation process:

1) Sponsors are encouraged to establish a schedule whereby all volunteers and staff receive at least annual performance evaluations.

2) The evaluation process should include a road performance evaluation for drivers.

3) The manager or designee should ride along with the drivers while they are performing their duties. Attention should be paid to vehicle operations, rider care, and general ability to meet program standards.

4) Performance evaluations are essential in securing equitable insurance rates and identifying drivers who may need intervention training or who should no longer transport riders.

5) Following a performance evaluation, the manager and volunteer should meet to discuss the observations. Any refresher training needed should be documented.

6) The performance evaluation and discussion should be documented, signed, and become a permanent part of the personnel file.

7) If needed, a plan should be developed and additional training provided. Documentation of improvement should be included in the driver's file.

8) "Objective" documentation is always written, and it refers to what was seen, heard, or measured. Objective documentation is not what was "felt" or "sensed," which is "subjective." Objective documentation of performance should be an on-going and common occurrence. This documentation is necessary for tracking driver development and for defense in litigation.

9) Volunteer driver programs and sponsoring organizations should establish a program of regular recognition for the volunteers.

Mixing Volunteers with Paid Employees

A volunteer driver can create the same liability for a volunteer driver program and a sponsoring organization as a paid driver. All employees and volunteers should be properly trained, supervised, and managed under the same or similar policies. Without proper management, conflicts can arise when volunteers and paid employees do the same or similar work. To avoid these conflicts, the

following guidelines should be established for successfully managing volunteers and paid employees in the same program:

1) Discuss with staff how volunteers can be placed to improve services without displacing paid workers.

2) Assign volunteers and paid staff with the same care and have the same performance expectations of both.

3) Provide orientation/training equally to both paid staff and volunteers.

4) Establish a clearly defined chain of command.

5) Assure that all volunteers and paid staff have clear job descriptions, with accurate descriptions of responsibilities.

Departure of Volunteer Drivers

It is unfortunate when volunteers leave a program. There are many valid reasons for this occurring: diminished health, increasing age, moving, going on to other volunteer work, etc. When a volunteer decides to leave, the manager should schedule an Exit Interview. The interview can be done over the phone. The interview provides an opportunity to receive feedback about the volunteer's experiences. This is also a good time to remind the departing volunteer about what they cannot do once they leave the program, like contacting or providing rides for program participants. *Section 8 - Forms (Examples and Templates), Policies, and Procedures* includes a sample Exit Interview form.

Volunteer Driver Identification

Photo identification (I.D.) cards are recommended for all volunteer drivers. The cards should identify the volunteer as a representative of the volunteer driver program or sponsoring organization. The cards assure the rider that the driver is a currently registered driver for the volunteer driver program or sponsoring organization. I.D. cards can be easily made using an instant

or digital camera to take a picture of the driver. The resulting card can then laminated or inserted into a simple convention badge blank. The I.D. card should be collected at retirement or termination. Wearing or displaying an organization I.D. card, decals for vehicles, and volunteer driver program logoed apparel may also be a topic in the personnel manual.

Photo credit: SAINT

Driver Conduct

Driver conduct is one of the most important elements contributing to how the volunteer driver programs and sponsoring organization are viewed by the public they serve. Clearly written driver conduct policies can assist the volunteer driver program and a sponsoring organization in ensuring the safety of riders. Drivers who are invested in the program's service, well trained and confident in their ability to serve riders are also a transit system's best marketing tool.

Policies may include the following:

- Following Traffic Laws
- Controlled or Illegal Substances
- Theft, Violence, and Gross Negligence
- Confidentiality, Conflict of Interest, Code of Conduct, and Ethics
- When to Report an Issue

See *Section 2 - Volunteer Driver Programs/Personnel Policies* and *The Importance of Community Relations*.

Following Traffic Laws

All drivers must be familiar with and adhere to state and local traffic laws and regulations. Depending on the seriousness, violations of traffic laws and/or chargeable collisions can result in additional training or termination of the driver. Drivers who have their driver's licenses suspended or revoked are subject to immediate termination.

Controlled or Illegal Substances

The use, sale, distribution or possession of intoxicating liquor, a controlled substance, a drug not medically authorized, or other substance which impairs the job performance of a volunteer must be strictly prohibited and result in swift disciplinary action. Drivers should also be required to report to the manager any use of medically authorized drugs which may impair their job performance. Proper written medical authorization from a physician should be provided to the manager in order to work when using such authorized drugs. State and local laws must be taken into consideration along with the policies of the sponsoring organization, as appropriate, and any funding sources.

Theft, Violence, and Gross Negligence

Sponsoring Organizations must have policies in place to prevent theft, violence, and gross negligence on the part of the volunteer driver. These policies should be strictly adhered to. The purpose of the policies is to protect not only the volunteer driver program, sponsoring organization, and the riders, but also protect the driver from false accusations of misconduct.

In order to eliminate claims of theft, volunteers should not enter residences of riders or accept gifts or gratuities from riders. However, volunteers for some programs do enter the rider's homes as part of helping with housework and other duties. Policies for these activities should be developed to protect both the rider and the volunteer. As an example, see **Nevada RSVP's** case study in *Section 7 – Case Studies and Methodologies*.

The following are examples of offences that are grounds for immediate dismissal or termination:

- **Theft** of funds, equipment, or services.

- **Gross negligence** with regard to the safety and well-being of self, riders, the general public, or program equipment.
- **Engaging in physical or verbal confrontations** while on duty.
- **Failure to provide high quality rider service** or to positively represent the volunteer driver program and sponsoring organization in the community.

Confidentiality, Conflict of Interest, Code of Conduct, and Ethics

Confidentiality

Confidentiality should be reviewed regularly in each program. Transportation volunteers often know or become familiar with riders. While it is desirable to establish a positive relationship with riders, it is important to avoid situations that can create "Conflicts of Interest." All transportation volunteers should sign a confidentiality statement and acknowledge an understanding of confidentiality rights. The subject of Confidentiality may also be included as a part of Social Services Networks training (below). *Section 8 - Forms (Examples and Templates), Policies, and Procedures* includes a sample Confidentiality Policy.

Violations of confidentiality or conflict of interest policies should be grounds for termination. Guidelines for the sharing and handling of information about riders by a transportation program's representatives, including drivers, are as follows:

"Right to Confidentiality" is breached when information received from or about riders is repeated to persons other than the Manager or appropriate staff. Riders may confide in a trusted driver. It is tempting to share this information. Volunteer drivers are encouraged to share their concerns with the manager, but not with other drivers, family, or friends. Only information that the manager "needs to know" can be communicated. Even the names of individuals receiving service from a program must not be shared with anyone outside the volunteer driver program and sponsoring organization.

Information about a rider must not be shared, unless it is necessary to obtain needed services, and the rider has given written consent. If a rider is not able to give permission to share information for their well-being, the driver and manager should use their best judgment to share information only to ensure that the services needed are provided.

Under some circumstances, the transportation volunteer is required to share information. See *When to Share Information* below.

Conflict of Interest

"Conflict of Interest" occurs when personal arrangements for transportation are made with riders outside the scope of duties as a program volunteer. Such arrangements are prohibited and can lead to serious liability issues for the driver, the volunteer driver program, and sponsoring organization.

- Riders should not have access to personal phone numbers and addresses of transportation volunteers. Requests for this type of information should be relayed to the Manager.
- Transportation volunteers should not ask personal questions of riders
- Transportation volunteers may not accept gifts or gratuities.
- Program volunteers will not use, to their personal advantage, any rider information gleaned in the course of their duties.

- Volunteers will not use the volunteer driver program and sponsoring organization's vehicles for personal business.

Code of Conduct

All drivers should follow the volunteer driver program and sponsoring organization's Code of Conduct. *Section 8 - Forms (Examples and Templates), Policies, and Procedures* includes a sample Driver Code of Conduct.

Code of Ethics

Drivers should be familiar with all aspects of the volunteer driver program and sponsoring organization's Ethics Policy. *Section 8 - Forms (Examples and Templates), Policies, and Procedures* includes a sample Code of Ethics.

Training Volunteer Drivers

The quality of service and the volunteer driver program and sponsoring organization's access to insurance depend upon the driver's ability to effectively interact with the community and to safely operate specialized vehicles. Drivers who transport community members are legally held to a higher degree of care than any other driver on the road.

Volunteer driver programs and sponsoring organizations should require specific training for all drivers operating vehicles or providing transportation services as part of a volunteer driver program. Training for all volunteers should be structured to conform to the duties in the job description. Programs should either identify a staff person or persons to be a trainer or can arrange for timely access to other trainers.

Note: Many funding agencies require certain types of training for volunteer drivers. Volunteer driver programs and sponsoring organizations should check with their respective funding agencies for their specific requirements.

What About the Cost of Training?

Volunteer driver programs and sponsoring organizations should provide the required training at no cost to active volunteers. To ease the burden of the cost of outside training, the volunteer driver program or sponsoring organization may be able to get assistance by requesting technical assistance from other transportation providers.

Training options to consider include:

- Request scholarships through the State Rural Transit Assistance Program (RTAP). Also see the Directory of RTAP Managers.

- See National RTAPs Training Overview for a listing of the training materials that are available free of charge. They include National RTAP's ADA Driver Training and ADA Driver Training Hands-on Evaluation.

- Low cost training may also be available through State Transit Associations and State DOTs.

- Community transportation associations may also be good sources of training. As an example, the Community Transportation Association of the Northwest (CTANW) provides

- members, partners and communities with tools, resources and information. This includes [driver training](#).

- Training videos for drivers and transit personnel are available at [National Aging and Disability Transportation Center (NADTC), Access Matters Videos](#).

- Also available at a cost:

  - The Community Transportation Association of America (CTAA) offers [Passenger Assistance Safety and Sensitivity (PASS) Training](#).

  - Easterseals Project Action offers [Sensitivity Training for Bus Drivers](#).

Documentation is Important

Volunteer driver programs and sponsoring organizations are responsible for assuring their volunteers are current with all training requirements and that driver files are properly maintained with the appropriate certificates of training completion. Training documentation, including certificates of completion, should be maintained in driver files. More information on driver files is outlined in *[Section 6 - Program Records](#)*.

Why Use a Driver Training Checklist?

A training checklist form should be used to document the training progress of transportation volunteers. The training Checklist should be updated each time a training course is completed. In addition, volunteer driver programs and sponsoring organizations should require that the drivers sign a statement acknowledging the training they receive. Volunteer driver programs and sponsoring organizations may maintain a signature form for each training session or develop a composite form. *[Section 8 - Forms (Examples and Templates), Policies, and Procedures](#)* includes a sample Driver Training Checklist.

Recommended Types of Training

Below are specific types of training that are recommended for all volunteer driver programs. Training should be an ongoing process that begins with mandatory and essential training with refresher and new training, as appropriate. Some funding sources may require that certain training be repeated in regular intervals. Volunteer driver programs and sponsoring organizations should check with funding resources for details. As an example, [FTA Circular 4710.1 Americans with Disabilities Act Guidance, Section 2.9.2 Types of Training](#) provides examples of the types of training that would be appropriate for drivers, vehicle mechanics, customer service agents, vehicle dispatchers, and managers.

- Orientation/Logistics

- Vehicle Operation, Lift Operation, Wheelchair Securement, and Road Experience

- Controlling Exposure to Bloodborne Pathogens

- Defensive Driving Training

- Passenger Assistance and Sensitivity Training

- Car Seats and Child Securement

- CPR and First Aid, and Emergency Response

- Social Service Networks

- Confidentiality

- Abuse, Neglect, Abandonment, and Exploitation

- Drug-Free Workplace

Orientation/Logistics

Driver orientation training should cover all of the aspects that would usually be explained to any new employee, e.g., organizational mission and values, job description, expectations, completion of forms, reporting requirements, vehicle operation, public relations, ethics, code of conduct, harassment policies, and reimbursement procedures. *Section 8 - Forms (Examples and Templates), Policies, and Procedures* includes a model Driver Orientation.

Vehicle Operation, Lift Operation, Wheelchair Securement, and Road Experience

For drivers who only use their personal vehicles, vehicle orientation with lift operation and wheelchair securement is not required unless the vehicles have been made ADA accessible.. However, road experience observation and testing is required for all drivers.

For drivers who will be using agency vehicles, the volunteer driver should be given training on vehicle operations, lift operations, and wheelchair securement. In addition, road experience observation and testing must be completed prior to transporting passengers.

All training should be documented and become a permanent part of the volunteer's personnel file. *Section 8 - Forms (Examples and Templates), Policies, and Procedures* includes a sample Volunteer Driver Road Test and a Lift Operation Procedures Checklist.

Note: Road testing should be repeated at least annually and for cause with all drivers. This is an opportunity to identify volunteers who may have developed undesirable driving habits or may be experiencing effects of aging or disability that can affect driving ability.

Controlling Exposure to Bloodborne Pathogens

Volunteer driver programs and sponsoring organizations should provide appropriate training on transmission of Hepatitis B Virus (HBV), Human Immunodeficiency Virus (HIV) and other blood-borne pathogens.

Volunteer driver programs and sponsoring organizations should develop a plan to minimize exposure. The plan should be reviewed at least annually to ensure proper effectiveness in minimizing exposure. The controls contained in the plan are designed to be a guide for programs when designing their exposure control procedures. Bloodborne pathogen control training should be provided to volunteers prior to transporting or assisting riders. *Section 8 - Forms (Examples and Templates), Policies, and Procedures* includes a sample Bloodborne Pathogen Exposure Control Plan.

Volunteer driver programs and sponsoring organizations should consider the following practices in relation to Bloodborne Pathogens:

- Volunteers should sign a document verifying receipt of the instructions and their understanding of proper blood-borne exposure control procedures.

- All vehicles used to transport riders should have a Body Fluid Precaution Kit stored in a convenient location inside the vehicle. Body Fluid Precaution Kits differ from First Aid kits in that they contain products and equipment to minimize exposure to infectious body fluids. The Red Cross provides instructions on how to make the kits.

- The driver should document any exposure to body fluids. They may do this with the Exposure Incident Report Form and report. The form and report should then be turned in to the Manager. *Section 8 - Forms (Examples and Templates), Policies, and Procedures* includes a sample Exposure Incident Report.

- The Manager should conduct a post-exposure evaluation and document any recommendations for follow-up.

Note: Training on bloodborne pathogens is recommended for all volunteer programs; however, many funding agencies require this training be given to volunteers. See the Center for Disease Control (CDC) Bloodborne Infectious Disease Risk Factors; and Oklahoma State University Bloodborne Pathogen Training Module. National RTAP's Resource Center-Topic Guides/Bloodborne Pathogens Topic Guide has a great list of resources for this topic.

Defensive Driving Training

It is recommended that within 60 days following the initial driving assignment all drivers should complete an approved Defensive Driving Course (National Safety Council or equivalent). This training is available through a variety of sources and formats and is available through the National Safety Council in a self-paced, self-scored format. The AARP Defensive Driving Course is another option that may be recognized by insurance companies who provide discounts for drivers who have completed safety courses.

As an example, Washington State law allows licensed drivers, age 55 and over, to receive reductions in private automobile insurance premiums if they complete an approved eight-hour vehicle accident prevention course. Each course includes information about the effects of aging on driving; driver problem areas such as yielding the right of way, driver awareness, speeding, passing, road signs and signals; and driving while under the influence of alcohol or drugs. Senior Driver Training

Passenger Assistance and Sensitivity Training

Within 60 days following the initial driving assignment, all volunteer drivers should have Passenger Assistance Training (PAT), CTAA Passenger Service and Safety Certification training (PASS), or an equivalent course appropriate for the services they will provide. For example, those volunteer drivers that will not operate a lift equipped vehicle will not need an entire passenger assistance training program. This training should emphasize sensitivity and assistance to elderly and persons with disabilities as well as communication with riders. See the list of training options listed earlier in *What About the Cost of Training?*

The Rider Assistance and Customer Service section of National RTAP's ADA Toolkit provides a useful discussion about respectful and courteous customer service for people with disabilities. It also

includes many tips and resources for assisting and communicating with riders. National RTAP eLearning ADA Driver Training is also a valuable resource for all transportation providers.

Car Seats and Child Securement

All drivers that are going to transport children in any vehicle should have training in current state and federal requirements for car seats and booster chairs. In addition, they should be trained on how to properly install these devices.

Keep the following in mind when addressing the transportation of children:

- It is recommended that vehicles owned by the volunteer driver program or sponsoring organization be equipped with child seats and booster chairs that can be properly fitted to the vehicle.

- If the volunteer is using their POV, take care to ensure that the car seat or booster chair can be properly fitted to the vehicle. The agency should supply car seats, as needed.

- Car seats provided by the rider's parents or personal representatives must not be used in either private automobiles or in the volunteer driver program or sponsoring organization's vehicles. This is because the privately owned car seat or booster chair may:

  - Not be a currently approved design

  - Have been in use during an accident

  - Be older than five years

  - Not be securable given the design of the car seat in comparison to the vehicle's seat belts

Photo Credit: KFH Group

- Drivers should be trained about proper seating positions related to operational airbags. Riding in a seat equipped with air bags can be dangerous even for adults with small statures.

- Child passenger safety programs vary from state to state. Here are few examples:

  - Texas - The Safe Riders Child Passenger Safety Program is a Texas Department of State Health Services (DSHS), in cooperation with the Texas Department of Transportation (TxDOT) includes Safe Riders Resources and Materials.

  - New York - Governor's Traffic Safety Committee, Child Passenger Safety. This website contains links to child safety programs and laws.

Additional reading on the subject of car seats and child securement:

Safe Ride 4 Kids- Car Seat Laws by State ; National Safety Council, National Child Passenger Safety Board, Trainings to Boost Your Child Passenger Safety Knowledge and Skills

Governors Highway Safety Association's website on Child Passengers

CPR and First Aid, and Emergency Response

First Aid and CPR training is optional for all drivers. While risk management professionals differ on the liability benefits and detriments of this type of training, Volunteer driver programs and sponsoring organizations should develop a policy on this issue. If specific training is not required, drivers should be trained how to access available emergency services.

All of the volunteer driver program or sponsoring organization's vehicles should be equipped with two-way radios, cell phones or other communication devices that reliably operate in the service area. Some programs have developed cell phone loan programs for their POV drivers.

Additional resources for Emergency Response training follow:

- National RTAP, Active Shooter eLearning Course

- National RTAP, Problem Passengers: Managing Difficult Passengers & Situations

- National Transit Institute (NTI) Assault Awareness and Prevention for Transit Operators online course

- National RTAP, Transit Manger's Toolkit, Safety, Security and Emergency Management

- National RTAP, Americans with Disabilities Act (ADA) Toolkit, Emergency Management

Social Service Network Training

All transportation volunteers should receive Social Service Network training to give volunteer drivers a broad orientation to the social service network in the service area. Social Service Network training educates community members and volunteers to identify the signs of abuse or neglect in vulnerable adults and children and provides local information on how to follow up with concerns. With Social Service Network training drivers can make appropriate referrals for other services that riders may need. As an example, *Section 8 - Forms (Examples and Templates), Policies, and Procedures* includes Washington State's Social Service Network "Gatekeeper" Training Content.

Confidentiality

As discussed earlier in this section, transportation volunteers often know or become familiar with riders. For that reason, it is important that all volunteers recognize and avoid situations that can create "Conflicts of Interest." It is also essential that volunteer drivers are aware that, under some circumstances, they may be required to share information. Training on confidentiality may also be included in the *Social Service Network* training curriculum discussed in above.

Abuse, Neglect, Abandonment, and Exploitation

Certain defined professionals are required to report suspected abuse, neglect, abandonment, and exploitation of vulnerable adults and children. Social service program volunteers may be subject to these. Volunteer driver programs and sponsoring organizations should provide training on these issues and document completion of the training. *Section 8 - Forms (Examples and Templates), Policies, and Procedures* includes model forms from Washington State for reporting Abuse, Neglect, Abandonment, and Exploitation.

Drug-Free Workplace

All volunteers must have training about the Federal Drug-Free Workplace Act. Volunteer driver programs and sponsoring organizations should document the driver's understanding of this training. *Section 8 - Forms (Examples and Templates), Policies, and Procedures* includes a sample Drug Free Workplace Policy.

Section Resources

AARP Defensive Driving Course

The Community Transportation Association of America (CTAA), Passenger Assistance Safety and Sensitivity (PASS) Training

Center for Disease Control (CDC) Bloodborne Infectious Disease Risk Factors

Community Transportation Association of the Northwest (CTANW), driver training

Easterseals Project Action, Sensitivity Training for Bus Drivers

Federal Bureau of Investigation National (FBI) - FBI blue form (FD 258)

Federal Motor Carrier Safety Administration (FMCSA) - FMCSA's Medical Applications and Forms website includes a Medical Examination Report Form and a Medical Examiner's Certificate

Federal Highway Administration (FHWA) – State DOTs

Federal Transit Administration (FTA) Circular 4710.1 Americans with Disabilities Act Guidance, Section 2.9.2 Types of Training

Governors Highway Safety Association's website on Child Passengers

Head Start Transportation Training Resources

National Rural Transit Assistance Program (National RTAP) –

> Americans with Disabilities Act (ADA) Toolkit, Emergency Management, Passenger Assistance and Customer Service
>
> Active Shooter eLearning Course
>
> Directory of RTAP Managers
>
> National RTAPs Training Overview
>
> National RTAP's ADA Driver Training and ADA Driver Training Hands-on Evaluation
>
> Problem Passengers: Managing Difficult Passengers & Situations
>
> Resource Center-Topic Guides/Bloodborne Pathogens Topic Guide
>
> State Rural Transit Assistance Program (RTAP)
>
> State Transit Associations
>
> Transit Manger's Toolkit, Safety, Security and Emergency Management

National Safety Council, National Child Passenger Safety Board, Trainings to Boost Your Child Passenger Safety Knowledge and Skills

National Sex Offender Public Website (NSOPW), registries for states, territories, and tribes

National Transit Institute (NTI) - Assault Awareness and Prevention for Transit Operators

New York - Governor's Traffic Safety Committee, Child Passenger Safety

Oklahoma State University Bloodborne Pathogen Training Module

Safe Ride 4 Kids- Car Seat Laws by State

Texas - Texas Department of Public Safety, Crime Records Division Public Website, Criminal History Conviction Name Search, Texas Sex Offender Registry

Texas - Safe Riders Child Passenger Safety Program, Safe Riders Resources and Materials

Washington - Department of Social and Health Services Secretary's List of Disqualifying Crimes

Washington - Senior Driver Training

Washington - Washington State Patrol Identification and Criminal History Section (WASIS), WATCH (Washington Access To Criminal History), Criminal History Record, and Child and Adult Abuse Record.

Section 5 – Day-to-Day Operations

Photo credit: Space Coast Transit/Volunteers in Motion

This section of the Toolkit contains guidelines on the types of policies and procedures that should be considered for the day-to-day operations of a volunteer driver program. For the purposes of this Toolkit, the term "Operations" includes policies and processes related to scheduling rides, management of vehicles (including private vehicles) used to provide passenger transportation services, maintenance of vehicles and equipment, and incidents, accidents, and collisions.

While this section of the Toolkit focuses on the day-to-day operations of a volunteer driver program, the interaction between these operational functions and the guidance and information provided in other sections of this Toolkit are meant to work together.

This section covers the following key aspects related to day-to-day operations:

Scheduling

- How far in advance should requests be submitted?
- How should volunteer preferences be taken into consideration?
- What type of technology should be used to schedule trips?
- Is there a limit on how many trips a rider can schedule?
- Is there a maximum one-way distance for trips?

Vehicles, Equipment, and Maintenance

- Vehicles
- Vehicle Inspections
- Maintenance

Trip Plans

Inclement Weather

Incidents, Accidents, and Collisions

- Incident Reports
- Procedures for Vehicle Collisions

Section Resources

Scheduling

The scheduling of trips is a critical component of the day-to-day operations of a volunteer driver program, and the process can vary from one program to another based on the number of available drivers, use of technology, and other factors. Some considerations include:

How far in advance should requests be submitted?

Volunteer driver programs need sufficient time to match the requested ride with an available and appropriate volunteer driver. Therefore, most programs require ride requests to be submitted at least two to three days in advance. This would include requests for both one-way and round trips.

Standing order or reoccurring trips may be scheduled for individual riders with weekly or monthly appointments. However, programs may want to establish a maximum lead time for trip reservations. When reservations are made too far in advance, riders may forget and this can lead to no shows. The program may require that the rider confirm each trip in advance.

Some volunteer driver programs, like Ride Connection in Portland, Oregon, offer a variety of transportation options and ask that riders make requests at least four days in advance. This gives the program's travel option counselors time to match individuals with appropriate services. Read more about Ride Connection in *Section 7 – Case Studies and Methodologies*.

How should volunteer preferences be taken into consideration?

Although changes to driver schedules will be ongoing, through the recruitment process volunteers should be asked what days of the week they would be available. Other preferences can be taken into account, such as any geographic limitations and length of trip they are willing to provide. Some riders may need greater assistance than some volunteers can provide.

Some volunteers may prefer to transport people similar to their age or of the same gender, and while it is very important that driver preferences be taken into account, they must be balanced with the need to ensure that all rider needs are met. See *Section 7 - Case Studies and Methodologies/Part Three – Lessons Learned* of this Toolkit for additional insight on how clear guidelines and expectations for volunteer drivers are necessary to ensure smooth day-to-day operations and high-quality service.

Care should be taken to not overwork volunteers.

> **SAINT** Volunteer Program:
> The volunteer driver application and interview should include questions about the volunteer's preferences.
> Those preferences must be readily available to the scheduler.
> *Read more about* **SAINT** *in* *Section 7 - Case Studies and Methodologies*.

What type of technology should be used to schedule trips?

The use of technology is often dictated by the size of the volunteer driver program. Smaller organizations with 20 or less daily trips often use simple spreadsheets.

Larger programs may use software that allow riders to schedule through a portal and volunteers to have access to a database through which they can accept trip requests (in addition to through phone

calls). *Section 7 - Case Studies and Methodologies/Part Two – Common Themes/Software Considerations* of this Toolkit contains additional insight on how some volunteer driver programs have been able to use various software technologies to enhance or improve service delivery and day-to-day operations.

Is there a limit on how many trips a rider can schedule?

Most volunteer driver programs have a limit on how many rides a client can request within a certain timeframe. For instance, Neighbor Ride in Howard County, Maryland notes that passengers are eligible for a maximum of 12 rides per month.

Is there a maximum one-way distance for trips?

Volunteer driver programs need to have set parameters on trip length based on available volunteer resources. Trips may be shorter for programs in more urbanized areas, while in rural communities, trip requests will be for greater distances. Trip locations and distances may also be determined by a funding entity, such as within a city or county.

King County Metro's Community Van Program does not have a distance limit for trips. Instead, trips may be taken up to two hours driving distance away from a starting location in one of the program's ten jurisdictions. Read more about Community Van in *Section 7 – Case Studies and Methodologies*.

Vehicles, Equipment, and Maintenance

Photo credit: Drive a Senior/Chariot

This section contains guidelines for the day-to-day management of vehicles, including both privately owned vehicles (POVs) and agency-owned vehicles, used to provide passenger transportation services.

Volunteer driver programs and sponsoring organizations should set minimum standards for the vehicles used to transport their riders. This requirement includes vehicles owned by volunteer drivers. This section provides some minimum standards for equipment and maintenance. Many of the same considerations for vehicles owned by the volunteer driver program or sponsoring organization can be applied in setting standards for POVs.

Photo credit: Ride Connection

Section 7 - Case Studies and Methodologies includes many examples of how various volunteer driver programs approach the need to ensure that all vehicles used to transport clients are clean and in good working condition on a daily basis.

Vehicles

Agency Owned Vehicles - Volunteer driver programs must comply with any state law minimum requirements for vehicles used to provide passenger transportation services. Federal and state funding sources may also have specific minimum requirements for vehicles. Vehicles owned by the volunteer driver program or sponsoring organization will usually have to meet Americans with Disabilities Act (ADA) requirements. National RTAP's ADA Toolkit contains information and resources related to ADA regulations for the maintenance and operation of accessibility equipment.

The U.S. Access Board: ADA Vehicle Accessibility Requirements is another valuable resource for understanding accessibility specifications.

Photo credit: WexExpress New Freedom

Privately Owned Vehicles (POVs) – When volunteers drive POVs, a variety of vehicles may be used to provide trips. Nevertheless, a volunteer driver program should have consistent requirements, and require volunteers to ensure their vehicles are clean and in good working condition, and preferably less than ten years old.

Volunteer driver programs must comply with any state law minimum requirements for POVs used to provide passenger transportation services. The following list is adapted from Washington State's POV requirements:

1) Have a valid state license and registration.

2) Be equipped with functional heating and ventilation systems.

3) Have functioning, clean, accessible seat belts that meet state and federal guidelines.

4) Have functional doors and handles on all doors.

5) Have an accurate speedometer and odometer.

6) Have windows free from cracks; windshield chips must be properly sealed and not hinder vision.

7) Have functioning interior lighting within the passenger compartment.

8) Have adequate sidewall padding and ceiling covering.

9) Have two exterior rear view mirrors, one for each side of the vehicle.

10) Not have damaged or broken seats, protruding sharp edges, etc. that may be hazardous to riders.

11) Have fully functioning lights, turn signals, and windshield wipers.

12) Have tires with tread depth exceeding state minimums.

Vehicle Inspections

Vehicles used to provide passenger transportation should be inspected daily to ensure the safety of both the rider and the volunteer driver and make sure that all of the vehicle equipment is in proper working order. This is commonly called a pre-trip inspection. Pre-trip inspections should be done with both POVs and the program or organization's vehicles, and should be completed prior to departing to pick up a rider. POV Drivers should be provided with the same or similar pre-trip inspection forms as those used for agency owned vehicles.

Volunteer drivers must complete pre-trip inspections to ensure vehicle safety. To accomplish this:

- Volunteer drivers should be provided with information on how to properly inspect the vehicle. All inspections should be recorded using a pre-trip inspection form. Examples of Checklist Items include:

  - Tire pressure and tread condition.

  - Functional lights, signals, and windshield wipers.

  - Operational brakes and seatbelts.

  - No visible leaks or engine warning lights.

  - Properly functioning air conditioning and heating, as appropriate.

- No safety defects of any kind.

- Drivers should complete a pre-trip inspection even when using their own vehicle to provide service.

- The volunteer driver program or sponsoring organization should periodically include "safety reminders" with volunteer mileage reimbursement vouchers.

Section 7 - Case Studies and Methodologies/Part Two – Common Themes/Risk Management Strategies/Vehicle Maintenance and *Key Shared Risk Management Strategies* of this Toolkit includes examples of how programs incorporate regular checks for basic vehicle safety and maintenance. *Section 8 - Forms (Examples and Templates), Policies, and Procedures* includes a sample Pre-Trip Inspection form.

Annual Safety Inspections

In addition to inspecting their own vehicles, volunteer driver program and sponsoring organizations should require POV safety inspections as part of their annual renewal process for volunteer drivers. The volunteer should provide the volunteer driver program or sponsoring organization with a copy of a receipt showing that the volunteer driver has had their vehicle inspected by a qualified mechanic.

Maintenance

Volunteer driver programs should have policies in place to guide the routine maintenance of vehicles used to provide rides to eligible customers. In most cases, the volunteer driver program's sponsoring organization will have a maintenance plan in place for agency owned vehicles. The maintenance plan must be in compliance with federal and state requirements for funding. *Section 8 - Forms (Examples and Templates), Policies, and Procedures* includes a sample Maintenance Plan.

At a minimum, the written maintenance plan should include:

- Preventive maintenance inspections and scheduled services (the manufacturer's recommended servicing schedule, at least)

- Maintenance provisions for accessible equipment

- Warranty compliance

Volunteer driver programs and sponsoring organizations may want to consider inspection and maintenance incentive programs or cost reduction programs with local mechanics or service stations.

Additional Resources

The Volunteer Transportation Center, Inc. (VTC) in Northern New York State has a Vehicle Inspection Checklist on its website.

The Ohio Department of Transportation's Rural Transit Manual contains a section on Preventive Maintenance for Vehicles

Trip Plans

Trip plans are designed to ensure the safety of all drivers, including those who use their own vehicles. Volunteer driver program and sponsoring organizations should have procedures for volunteers to follow in the event of a breakdown or accident during normal service delivery hours.

Back-up plans should also be prepared for all trips provided when vehicles are loaned to other organizations or when volunteers are traveling outside the normal service area and/or service hours.

To ensure client and driver safety in the event of an emergency, Ride Connection's Operation Manual includes descriptions for developing an Emergency Backup Plan for Daily Operations and for Fifty-Mile Backup Plans. A Fifty-Mile Backup Plan is for trip destinations that are beyond a fifty mile radius from a **Ride Connection** location and must specify the procedure and contacts necessary to safely transport riders home and deliver the out-of-service vehicle to a Ride Connection site or a service/repair site. Read more about **Ride Connection** in *Section 7 – Case Studies and Methodologies*. *Section 8 - Forms (Examples and Templates), Policies, and Procedures* includes sample Trip and Back-up Plan forms.

Inclement Weather

Photo credit: KFH Group

Every program should have a comprehensive plan for inclement weather. As technology advances, accurate information is available through a variety of media including the Internet. An inclement weather plan should have guidelines, policy, and procedures to assist management in making decisions about when to suspend service and how to communicate cancellations to riders. Use the following guide when developing an Inclement Weather Plan:

1) If the volunteer driver program or sponsoring organization attempts service on inclement weather days, the driver can decline service if the driveway leading to the rider's location or

if assisting the rider to or from the vehicle, is dangerous due to weather conditions. Sometimes the decision is made upon arrival at the rider's location.

2) If weather and road conditions deteriorate through the day, only return trips should be attempted. The manager can determine whether hazardous road conditions warrant ceasing services.

3) Requests for urgent medical rides and life-sustaining medical trips should not be provided in private cars in inclement weather. Appropriate referrals should be made to other modes, including ambulances.

4) In preparation for and during inclement weather, if the trip is not urgent or life sustaining (e.g., dialysis), riders should be encouraged to reschedule.

Section 2: Volunteer Driver Programs/Emergency Management of this Toolkit includes guidance and information about providing service in severe weather. *Section 4 - Establishing and Managing a Volunteer Driver Pool/Driver Duties* also discusses volunteer driver responsibilities with respect to adhering to any policies or procedures that the program has in place for emergency weather conditions.

Incidents, Accidents, and Collisions

Volunteer driver programs and sponsoring organizations should have detailed procedures and training for volunteers to follow in the event of incidents, accidents, and collisions. These will help minimize claims filed against the volunteer driver program or sponsoring organization and will provide the driver with clear directions about what the volunteer driver should do in these types of emergency situations. This section provides guidance on the types of policies and procedures that a volunteer driver program or sponsoring organization should implement.

Incident Reports

Volunteer drivers should use Incident Reports to document vehicle collisions or any unusual occurrences (other than vehicle collisions). Programs may want to consider including a list of reportable incidents on Incident and Collision forms. The Volunteer Transportation Center, Inc. (VTC) in Northern New York State has an Incident/Accident Report that includes a list of reportable incidents. VTC Incident and Accident Report

Vehicle Collisions

All collisions related to a trip should be reported to the volunteer driver program or sponsoring organization, and a collision report submitted. **Collision reports must be completed by the driver of the vehicle and reviewed by the Manager within 24 hours.**

For organization owned vehicles, all collisions, no matter how slight, should be reported to the volunteer driver program or sponsoring organization, and a collision report submitted.

For privately owned vehicles, all collisions related to the trip (while transporting riders and to and from the pickup and drop-off sites), no matter how slight, should be reported to the volunteer driver program or sponsoring organization, and a collision report submitted

In the event of a serious collision, the volunteer driver should call 911 emergency services first and contact the volunteer driver program or sponsoring organization immediately after. A serious

collision involves severe property damage, personal injury or the potential for media involvement. Any claim of bodily injury or property damage must be reported to the manager immediately.

Incident Reports for Occurrences Other than a Collision

Drivers need to know when to complete an incident report for an occurrence other than a collision with another vehicle. Other such reportable incidents may include:

- Receiving a traffic ticket or being stopped by a law enforcement official for another reason.
- Any medical emergency that occurs while transporting a customer, including if a driver or client injures themselves during a trip, or anytime 9-1-1 is called during a trip.
- An argument between clients or between driver and client, including some rider complaints.
- Suspected abuse of children or vulnerable adults.

Section 2: Volunteer Driver Programs/Policies of this Toolkit speaks to the specific scenarios that may call for the driver to reach out to a manager immediately such as incident reporting; both motor vehicle accidents and other incidents involving a rider (falls, seizures, suspected abuse, neglect, abandonment, and exploitation). *Section 4 - Establishing and Managing a Volunteer Driver Pool/Driver Duties* also discusses reporting responsibilities and training for volunteer drivers with respect to suspected abuse and neglect. If abuse is suspected, this information must be conveyed to the Manager, but not to other drivers, family, or friends.

Procedures for Vehicle Collisions

In the event of an automobile collision, it is especially important that a volunteer driver program or sponsoring organization provide volunteer drivers with clear instructions on the procedures to follow.

Volunteer driver programs and sponsoring organizations are encouraged to prepare accident kits for all drivers. A kit should be kept in all vehicles owned by the volunteer driver program or sponsoring organization and should be provided to volunteer drivers operating POVs. Volunteers should be instructed to follow the procedures contained in the accident kit.

Typically, these kits include:

- Witnesses cards
- Disposable camera (or phone camera)
- Measurement tool
- Pen or pencil
- Chalk
- Form to diagram accident
- Emergency numbers and procedures

Procedures and Record Keeping

Complete and accurate records of any collision or claim of collision, no matter how slight, must be kept in a permanent file. "Permanent" refers to "as long as is required by law." Drivers should not admit fault to anyone other than the manager or police.

The Collision Scene

In the rare case that a serious or disabling collision occurs, ideally the manager, or designated representative, should immediately go to the scene of the collision to provide support and information. It is the responsibility of the manager to represent the program at the collision scene in a way that avoids any further liability. The manager should bring a camera (or phone camera) to the scene to assist with the review process.

Volunteer driver programs and sponsoring organizations may want to issue a plastic placard, to the volunteer, to hang on the rear view mirror. The card should state: "I am a volunteer driver for the volunteer driver program or sponsoring organization. In case of an accident notify the volunteer driver program or sponsoring organization by calling: (Phone #)." If law enforcement authorities can access the volunteer driver program or sponsoring organization's two-way communication system, that information should be included on the placard.

Because drivers can be injured or become distraught at the scene of a collision, collision procedures and guidelines should be an important part of orientation training for new drivers. Volunteers should be advised not to talk to the media.

It is important that the driver document who was in their vehicle and any vehicle that was involved in the collision. This can be done with a phone camera or disposable camera which is part of the vehicle's emergency equipment.

Procedures for Managers and the Scene of a Collision

Collisions of any type can be an upsetting situation for the driver. A distraught or injured driver can increase liability for the program by what they say at the collision scene. For example, when a driver tells riders or bystanders, "I'm so sorry, it's my fault," the potential for claims made against the program may increase. The program should pay claim expenses it is responsible for, but it should not pay additional expenses because of erroneous statements made at the scene of the collision.

Managers should consider the following factors when called to the scene of an accident:

1) Assure that riders are accounted for and are receiving proper emergency services.
2) Separate the driver from the collision scene.
3) Speak for the program and the driver.
4) Contact their program's counsel or other legal personnel.
5) The driver should be available to answer questions from police and fire authorities.

Media Relations at the Scene of a Collision

Poor media relations at the scene of a collision can cause additional liability. Managers and program representatives should be familiar with and follow procedures when communicating with the media. Guidelines should be in place for employees or volunteers at the scene of a collision. The guidelines may include:

1) Assume the media is present.
2) Project a professional image.
3) Maintain control of the situation.
4) Do not quote hearsay or speculation.

5) Do not accept responsibility for the collision.

6) Explain "no comment" by saying, "I don't have enough information to answer that question accurately."

7) Never speak "Off the Record."

8) When interviewed on camera or video, carefully select the background. Stand in front of a neutral background, not in front of the crash.

Collision Review

A Review Committee, consisting of the manager and other program representatives, is responsible for reviewing collision reports. In the event of a collision, the committee comes together to review the details of the collision and make recommendations. All collisions must be evaluated for preventability. In each case, preventability is evaluated on the basis of the following statement: "Did the driver do everything reasonably possible to avoid the circumstances that led to this collision?"

Need More Information, Examples or Resources?

The Volunteer Transportation Center, Inc. (VTC) in Northern New York State has an Incident/Accident Report that includes a list of reportable incidents. VTC Incident and Accident Report

Section Resources

National Access Board - ADA Vehicle Accessibility Requirements

National Rural Transit Assistance Program (National RTAP) - ADA Toolkit

Neighbor Ride, Howard County, Maryland

Ohio Department of Transportation's Rural Transit Manual, Preventive Maintenance for Vehicles

Ride Connection, Portland, Oregon, Ride Connection Operation Manual

Volunteer Transportation Center, Inc. (VTC), VTC Incident and Accident Report and Vehicle Inspection Checklist

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Section 6 – Program Records

Photo credit: Space Coast Transit/Volunteers in Motion

Volunteer driver programs are responsible for maintaining appropriate records and for being knowledgeable about legal requirements related to timelines for maintaining records.

This section of the Toolkit introduces records to be maintained by an organization operating a volunteer driver program. It provides an overview of record keeping needs and best practices.

What Driver Records Should Be Maintained?

How About Vehicle Records?

What Records Should Be Kept on Riders?

Performance Metrics

- How To Record Trip Information

Section Resources

What Driver Records Should Be Maintained?

The volunteer driver program must have a file containing all pertinent information about each driver. The Privacy Act of 1974, as amended, 5 USC Section 552a, is federal law that covers volunteer drivers. All personal information about the driver should be covered by a written confidentiality policy that parallels the organization's personnel policies. Volunteers should, within 24 hours and before the next trip, inform management of any changes. At a minimum, the following list of documents and related information, should be maintained in driver files:

1) Original volunteer/employment application

2) Interview and reference check documentation

3) Criminal history documentation (background checks)

4) Driver history report and any subsequent history reports generated

5) Copy of current driver's license

6) Copy of training certifications (e.g., defensive driving, CPR, etc.)

7) On-going objective documentation (complaints, commendations, evaluations)

8) Volunteer preferences regarding riders (e.g., mobility constraints)

9) Any documentation relevant to performance

10) Copy of current personal automobile insurance card (must meet or exceed state minimum requirements). Insurance must be at least the state's minimum coverage requirement for POV drivers.

Important: Personal auto insurance verification must be kept current. Regularly review driver records to ensure compliance and safety. *Section 8 - Forms (Examples and Templates), Policies, and Procedures* includes a Personnel Checklist that may be helpful.

Additional Resources:

Nonprofit Risk Management Center; *Risk on the Road: Managing Volunteer Driver Exposures, Does State Law Limit Liability for Volunteer Drivers?*

How About Vehicle Records?

Photo credit: SAINT

Privately Owned Vehicles – Programs that use privately owned vehicles must also maintain records for each volunteer vehicle. Files should be reviewed annually, and volunteers should immediately report any vehicle or insurance changes (e.g., new vehicle).

Vehicle file contents:

- Make and model
- Year
- Insurance Expiration Date
- Registration Expiration Date
- State Inspection (As required by state law)
- License Plate Number

Photo credit: Drive a Senior/Chariot

Agency Owned Vehicles - Programs that use volunteers to drive agency-owned vehicles must maintain detailed vehicle records. Files should be reviewed annually, and volunteers should immediately report any vehicle changes (e.g., failure to pass state inspection).

Vehicle file contents:

- Most recent state inspection report

- Vehicle maintenance schedule

- Maintenance and repair records

- Maintenance receipts

- Completed maintenance log entries

- Daily pre-trip inspection checklists

- Safety equipment inventory (fire extinguishers, first aid kits)

- Safety equipment maintenance logs

Important: Establish a preventative maintenance schedule and require all volunteer drivers to conduct pre-trip inspection or safety checks. *Section 7 - Case Studies and Methodologies/Part Two – Common Themes/Risk Management Strategies/Vehicle Maintenance* and *Key Shared Risk Management Strategies* of this Toolkit includes examples of how programs incorporate regular checks for basic vehicle safety and maintenance. *Section 8 - Forms (Examples and Templates), Policies, and Procedures* includes a sample Pre-Trip Inspection form.

Additional Resources:

The Volunteer Transportation Center, Inc. (VTC) in Northern New York State maintains registration, insurance, and state inspection information for privately owned vehicles. This information is collected in VTC's Volunteer Driver Application (downloadable application) and Vehicle Inspection Checklist.

What Records should be Kept on Riders?

Volunteer driver programs and sponsoring organizations may be required to maintain specific information on the riders using the services. Accurate rider information should be collected and properly maintained using a database or an adequate system done by hand if the agency does not have access to a computer. Collected rider information will be used primarily for reporting purposes. In the event of an emergency, this information can also be valuable. (*See Section 2 – Volunteer Driver Programs/Emergency Management.*)

Rider records should contain the following information:

- Rider's full name
- Rider preferences and/or requirements
- Address
- Phone number
- Age
- Medicaid and/or other specific program eligibility
- Mobility information (i.e., uses a wheelchair, cane)
- Disability information (i.e., cerebral palsy, legally blind)
- Height and weight for children
- Name, address and phone number of emergency contact

Individual volunteer driver programs and sponsoring organizations may require additional information for specific program purposes. To assure that rider confidentiality is maintained, rider files must be kept in a secure location.

Important: Data management software is used by some volunteer driver programs for better record-keeping and analytics. *Section 7 - Case Studies and Methodologies/Part Two – Common Themes/Software Considerations* and *Section 5 - Day-to-Day Operations/Scheduling* contain examples on the use of software.

Performance Metrics

Tracking performance metrics and trip reporting is essential for evaluating the efficiency and effectiveness of transportation programs. By systematically recording trip requests, completions, denials, cancellations, and no-shows, organizations can identify trends, improve resource allocation, and enhance service reliability. Accurate documentation also supports compliance with funding requirements and aids in justifying programs and program expansions. Standardized reporting processes, such as using dispatching software and structured trip logs, minimize administrative errors and provide a clear overview of service demand and gaps. This section outlines key performance indicators and best practices for data collection, helps programs assess efficiency and identify areas for improvement.

- How to Record Trip Information
- Trip Requests

Section 6 – Program Records

- Trip Reports

- Trip Denials, Late Cancellations, and No-shows

- New and Unduplicated Riders

- Trip Purpose Definitions

How to Record Trip Information

All trip requests and completed trip information must be properly documented. Standard forms should be used for reporting trip requests and completion. Trip request information should be recorded when the request is received and the trip completion information when the trip is completed. If a trip request is deemed to be "special risk," special forms and procedures may be used for the trip.

Dispatch software is used by some volunteer driver programs to electronically record trip information. *Section 7 - Case Studies and Methodologies/Part Two – Common Themes/Software Considerations* and *Section 5 - Day-to-Day Operations /Scheduling* contain insight on the use of software technologies to enhance or improve service delivery and day-to-day operations, including electronically recording trip information.

Trip Requests

Volunteer driver programs and sponsoring organizations are encouraged to develop a form to record information when a trip is requested. **Requests should contain the following minimum information:**

- Date and time the trip request was made

- Trip date and time (origin and destination)

- Rider name, address and phone number

- Destination address and phone number

- Trip purpose

- Appointment time (if needed)

- Pick up time

- One-way or round-trip

- Return pick-up time

- Special requirements (e.g., wheelchair accessibility, uses a cane, escort, child restraints required)

- Other instructions (e.g., go to the door, provide support)

- Emergency contact information. This information is very useful when a child or vulnerable adult is returned to a residence where no one is home as expected. Volunteer driver programs and sponsoring organizations should develop a policy requiring a personal care attendant (PCA) if there are repeated occurrences of drivers needing to use emergency contacts.

Note: *Section 8 - Forms (Examples and Templates), Policies, and Procedures* includes a sample Trip Request form.

Trip Reports

The driver must document trip completion information. This report may be combined into the reimbursement voucher and coupled with an Incident Report, if indicated. Driver reports typically contain the following information for each trip:

- Date
- Driver name
- Rider name
- Pick-up location
- Destination location
- Mileage at pick-up and drop-off
- Volunteer or paid driver hours (include waiting time but not down time)
- Status of trip (no-show, late cancel, or completed)
- Waiting time, if indicated
- Health or social services information, if indicated
- Any other issues or incidents

Standardized trip logs can help reduce administrative errors.

Trip Denials, Late Cancellations, No-shows, and Incidents

Managing trip cancellations and no-shows improves efficiency and resource allocation. To properly manage a volunteer transportation program, accurate information on trip request status must be collected. Information on trip request denials is valuable in determining the unmet need in the community and for the development of funding proposals. The driver log should document rider no-shows and late cancels. **Information must be recorded when:**

- A rider's trip request is denied
- The rider cancels the ride late
- The rider does not show for the ride
- An incident occurs prior to or during transport that may pose a safety issue

The following definitions apply:

> **Trip Denial:** Program is unable to provide a requested trip due to scheduling conflicts, lack of available drivers, or vehicle issues. The reason for the trip denial should also be recorded.
>
> If this occurs, the trip is recorded as a denial. If a rider requests a round-trip ride, the result is two trip denials.
>
> **Late Cancellation:** A ride is recorded as a late cancellation when the rider cancels a scheduled trip with less than 24 hours' notice. If the rider had requested a round-trip, the result is recorded as two late cancellations.
>
> A trip that is canceled less than one hour before the scheduled pick-up time is considered a no-show.

No-show: A ride is recorded as a no-show when the driver arrives at the pick-up location and the rider is not there or refuses to board or if the rider cancels with less than one hour notice. If a rider was scheduled for a round-trip, the first leg of the trip is recorded as a no-show and the return trip is recorded as a late cancellation. Note: Consider implementing a three-strike policy for frequent no-shows, requiring riders to confirm trips in advance.

Safety Issue/Incident: This can include any type of passenger incident that may impact the service such as (but not limited to): the physical condition of the rider or the equipment, including wheelchairs, or any other safety concerns. These should be reported immediately and prior to any attempt to transport.

New and Unduplicated Riders

Volunteer driver programs and sponsoring organizations may be required to report data on new and unduplicated riders. Funding agencies may require this information to be reported differently.

The following serves as an explanation for reporting new and unduplicated riders:

- **New rider:** When a rider registers with the program and receives their first ride, that person is a new rider. New riders are only recorded once.

- **Unduplicated rider** A person who receives service during a given fiscal year. Even if they take multiple trips, they are counted only once. The unduplicated rider count is the total number of people who received service (a ride) during the year.

- **When a rider is new and receives their first ride**, that person is a new rider and an unduplicated rider.

Note: Some programs use unique rider IDs to track unduplicated riders in reporting.

Trip Purpose Definitions

Clearly define trip purpose categories in data collection forms for accurate reporting. If rides must be counted by trip purpose on a service summary, the following terms could serve as a guide for identifying trip purposes:

Trip Term		Ride Purpose
	Medical	Non-emergency medical visits (e.g., physical therapy, check-ups).
	Life-sustaining medical	Dialysis, Chemotherapy, Radiation treatments.
	Personal business	Rides to meet personal needs. Examples may include visitation of spouse or others in nursing home, support group meetings, and banking.

	Supportive services	Rides to an agency or organization that provides direct or supportive services to the rider. Examples may include Social Security Office, Veteran's Administration Offices, Resource Centers, participation in Adult Day Care Center activities, etc.
	Shopping	Rides to any store, shopping center, mall or retail establishment.
	Education	Rides, to meet personal educational needs, to local colleges, universities, and educational training programs or meetings.
	Employment	Rides to and from a work/employment setting or assignment and work training.
	Volunteer activities	Rides to and from volunteer work setting or assignment, including from volunteer's home and to another individual's home if that is the work setting.
	Recreational	Trips to parks, museums, sightseeing, movies, opera, plays, etc.
	Nutrition:	Rides to and from a meal site, including restaurants.

Section Resources

Nonprofit Risk Management Center; *Risk on the Road: Managing Volunteer Driver Exposures, Does State Law Limit Liability for Volunteer Drivers?*

U.S. Department of Justice, Office of Privacy and Civil Liberties, Overview of The Privacy Act of 1974 (2020 Edition); Federal Privacy Act – Conditions of Disclosure

Volunteer Transportation Center, Inc. (VTC), VTC's Volunteer Driver Application (downloadable application) and Vehicle Inspection Checklist.

Section 7 – Case Studies and Methodologies

Photo credit: Space Coast Transit/Volunteers in Motion

This section of the Toolkit contains case studies, methodologies, and interviews meant to reflect the many volunteer driver programs that exist across the U.S. The authors and researchers involved with this project worked to ensure representation geographically (in various regions of the U.S.: Midwest, Northwest, Southwest, etc.), and to also include programs by typology: rural, urban (large cities), and suburban. This section is divided into three parts.

Part One – Individual Case Studies

- Senior Alternatives in Transportation (SAINT) Volunteer Transportation, Fort Collins, Colorado
- Space Coast Transit/Volunteers in Motion, Cocoa, Florida
- WexExpress New Freedom, Cadillac, Michigan
- Nevada Rural Counties Retired and Senior Volunteer Program (Nevada RSVP), Carson City, Nevada
- Ride Connection, Portland, Oregon
- Drive a Senior, Austin, Texas
- King County Metro Community Van, Seattle, Washington
- New Freedom/Compass IL Transportation Program, Menomonie, Wisconsin

Part Two – Common Themes

- Driver Incentives
- Training Strategies
- Risk Management Strategies
- Software Considerations
- Medical Considerations

Section 7 Case Studies and Methodologies

Part Three – Lessons Learned

- Volunteer Recruitment and Retention
- Communication with Volunteers and Riders
- Program Sustainability and Funding
- Volunteer Drivers - Clarity and Expectations
- Technology and Software Utilization
- Liability and Safety Concerns
- Volunteer Appreciation and Recognition
- Service Scope and Flexibility

Section Resources

Part One - Individual Case Studies

Individual approaches to providing service, relevant policies, funding sources, and driver recruitment and retention are among the topics examined in these case studies. Special attention is given to each volunteer driver program's background and history. Program structure and a program's ability to provide service to a wider variety of riders beyond the more traditional service to older adults and individuals with disabilities are also explored. Whenever possible, links to individual volunteer driver program resources are included at the end of each study.

Photo credit: Drive a Senior/Chariot – Community Ride to Giddings, Texas

Senior Alternatives in Transportation (SAINT) Volunteer Transportation, Fort Collins and Loveland, Colorado

About Senior Alternatives in Transportation (SAINT)

Senior Alternatives in Transportation (SAINT) provides door-to-door transportation for older adults (60 years or older) and younger adults who cannot drive due to disability in Fort Collins and Loveland, Colorado.

SAINT was founded in Fort Collins in 1983 by two women who were initially giving rides to their friends and family. Realizing there was a broader need for such services, they recruited volunteers through local businesses. A city-sponsored transportation program, Care-A-Van, Inc., was initially intended to serve a similar purpose, but it dissipated in 1994, at which point SAINT took over. A sister program was then started in Loveland, Colorado following the same model. As the word spread, the demand for rides increased.

SAINT had around 140 volunteers in the early 2010s and in 2018 the program provided 32,000 rides. In the fiscal year ending June 2024, SAINT provided over 19,000 rides to approximately 500 community members across both cities.

Note: The COVID-19 pandemic significantly impacted both volunteer numbers and ridership, reducing the volunteer base to 25 percent and ridership to 20 percent of pre-pandemic levels. SAINT's volunteer numbers have gradually recovered, and the program is currently operating with between 90 and 95 volunteers. The fact that the program provided 32,000 rides pre-pandemic reflects both the ongoing need for the service and the challenge of matching that need with a sufficient volunteer base.

Photo credit: SAINT

SAINT's mission is to help older adults and people with disabilities maintain their independence and self-sufficiency by providing connections to the community through personalized, door-to-door transportation. [SAINT – More About SAINT](#)

Program Structure

SAINT is a non-profit organization offering identical services in Fort Collins and Loveland. Transportation is not provided between the two cities or to outlying areas. If you reside in Fort Collins, you can receive free rides within the city, but not between Fort Collins and Loveland. The program's structure is simple: volunteer drivers use their own vehicles to provide door-to-door rides.

All rides are pre-scheduled; drivers receive their schedule of rides the day before they drive. The program's online scheduling system also provides a driver interface that allows drivers to access all the information about their schedule and options such as linking directly from scheduled rides to online maps and directions.

> "Maintaining the simple focus has allowed us to provide the service well."
> **Theresa Holbrook**
> SAINT Volunteer Coordinator

SAINT currently operates with two full-time staff members and three part-time employees, two of whom are responsible for scheduling and one who assists with all other tasks. SAINT has between 90 and 95 volunteers.

Rider Eligibility

SAINT serves older adults (60 years or older) and younger adults who cannot drive due to disability. The program is not able to provide rides for people who use a wheelchair. Rides are free for individuals 60 years or older.

Services, Service Area, and Scheduling

Services are available Monday-Friday, 8 AM - 4 PM, in Fort Collins and Loveland.
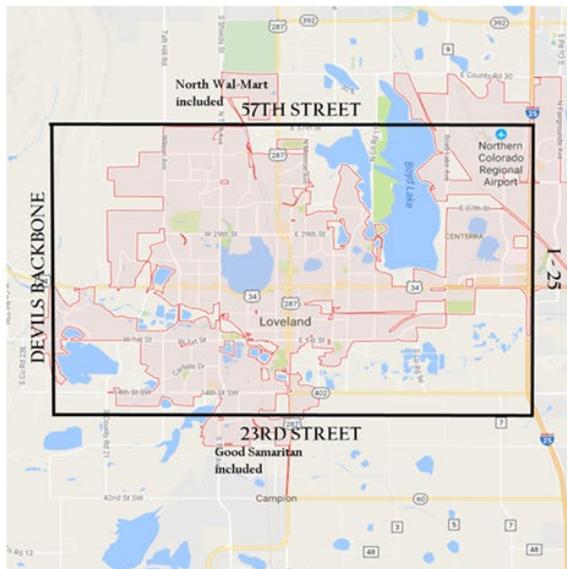
Photo credit: SAINT
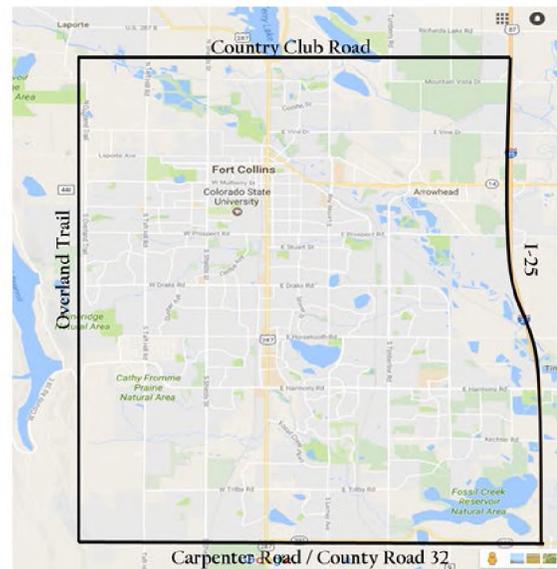
Photo credit: SAINT

Scheduling

SAINT uses a ride scheduling software to manage ride requests. Two staff members handle the scheduling, which is primarily done through voicemail. Once a request is received, the scheduler checks the calendar, books the ride, and confirms with the rider.

- Clients are asked to schedule rides at least three days in advance.
- Rides are only scheduled for the current and coming month.
- Only three round trips a week may be scheduled for each client.
- Cancellations should be made at least 48 hours prior to scheduled ride time.

Riders are also able to view scheduled rides online using a personal login and password.

SAINT also participates in the North Front Range Metropolitan Planning Organization's (NFRMPO) RideNoCo information hub. RideNoCo helps potential riders find the right mobility option for their needs. Read more in *Section 2 – Volunteer Driver Programs* of this Toolkit about how NFRMPO and RideNoCo are working with transportation providers to find transportation options for riders in Northern Colorado.

Funding and Operational Support

Most of the program's funding comes from the City of Fort Collins, the City of Loveland, and the Larimer County Office on Aging (LCOA). The remaining funds are sourced from donations (which currently account for 30 percent of funding) and grants from private foundations, which make up 12 percent of the total funding. With some federal and state funding decreasing, the program is facing a projected 60 percent reduction in its funding through the LCOA which coordinates state and federal funded services for older adults. This includes funding for transportation services through the [Older Americans ACT (OAA) Title IIIB: Grants for State and Community Programs on Aging](). However, as part of SAINT's strategic plan to stay financially sustainable, grants from private foundations have increased significantly. SAINT's financial and annual reports are available on the program website.

To maintain financial sustainability, the program is exploring other revenue sources, such as sponsorships and additional grant opportunities. SAINT will be hosting its first in-person fundraiser in November 2025.

Volunteer Drivers

Volunteer drivers receive mileage reimbursement, but many choose to donate their mileage. Most volunteers are retired individuals, with shift times designed to fit their schedules (8 AM to 12 PM and 12 PM to 4 PM, Monday through Friday).

Driver Eligibility

SAINT's volunteer driver requirements and skills are listed online along with information on how to apply to be a volunteer driver.

- Requirements
  - Eighteen or older
  - A clean, reliable vehicle
  - Liability insurance meeting Colorado state requirements
  - A desire to help
- Skills
  - Interpersonal and Communications Skills — a friendly smile and pleasant conversation make the rides fly by
  - Driving and Navigation Skills — SAINT requires authorization to obtain a driving record from the Department of Motor Vehicles; serious infractions (e.g.: DUI or reckless driving) will disqualify a candidate. Familiarity with Loveland or Fort Collins is a great plus, but driving for SAINT is a great way to learn your way around town. Map reading skills also come in handy.
  - Good Citizenship Skills — A criminal background check authorization is required; criminal convictions will disqualify a candidate

SAINT's driver selection process is straightforward:

1) Application - Drivers complete and return an online application.

2) Background check - Once the application is received, an online background screening is conducted.

3) Orientation - Drivers attend a 1 to 1.5 hour orientation session, during which they are introduced to the program's structure and operations.

Photo credit: SAINT

Recruitment and Driver Incentives

Recruitment primarily relies on word of mouth, with drivers promoting the program by displaying signs on their vehicles. Additionally, the program engages with organizations and faith communities through presentations. Though SAINT has attended outreach fairs and meetings, they have not yet formed consistent partnerships with local businesses. For example, Meals on Wheels in the local area collaborates with different organizations to share shifts, and SAINT plans to launch similar sponsorship initiatives in the upcoming year.

In 2025, the SAINT program offered volunteer drivers a mileage reimbursement of 31 cents per mile. Note: the IRS mileage rate was 14 cents per mile and reimbursement amounts greater than $600 per year must be reported as taxable income.

To show appreciation for volunteers, SAINT organizes three events annually:

Photo credit: SAINT

- **Spring get-together** -A casual gathering with sandwiches.
- **July picnic** - A large family-style potluck with door prizes.
- **November banquet** - An annual event where awards for "Driver of the Year" and "Life-Saver of the Year" are presented. This is a catered, sit-down event with entertainment.

These events are the primary occasions for volunteer drivers to interact with each other and with program staff. However, only about 60 percent of drivers attend these events, with the remaining volunteers remaining largely autonomous.

Driver Training

Training sessions, such as cardiopulmonary resuscitation (CPR) certification, are offered throughout the year. These trainings are not mandatory but are encouraged for volunteers who want to further develop their skills.

Conclusion

SAINT has dedicated volunteers and the support of the Cities of Loveland and Fort Collins, Larimer County, and the State of Colorado. The organization is currently pursuing additional funding sources to ensure its financial sustainability. This will allow the program to remain a reliable resource for older adults and individuals with mobility challenges

Additional Resources from SAINT

- [Older Americans ACT (OAA) Title IIIB: Grants for State and Community Programs on Aging](#)
- [SAINT Annual Reports 2019 - 2024](#)
- [SAINT Audited Financials 2020 – 2022](#)

Volunteers in Motion, Cocoa, Florida

About Volunteers in Motion (VIM)

Volunteers in Motion (VIM) provides safe and reliable transportation for people living on their own independently and have little to no family to help them and who can't use Space Coast Area Transit, Brevard County's public transportation system, fixed-route buses or paratransit service on their own. The program's volunteers provide an extra level of assistance and support to help riders get to important places like medical offices, pharmacies, and grocery stores.

VIM was established in 1996 as a pilot initiative in partnership with Space Coast Area Transit and the Senior Resources Alliance (SRA). The program was developed in response to the realization that SRA was not able to adequately serve certain individuals, particularly older adults. In collaboration with Space Coast Area Transit, Volunteers in Motion was launched using older transit vehicles to address this gap. Approximately 15 years later, Volunteers in Motion officially transitioned from the pilot phase establishing it as a permanent service while ceasing its funding contributions through SRA.

According to the program's annual operating report for 2023-2024, the program serves approximately 254 clients. While the primary demographic is older adults, Volunteers in Motion also provides transportation to medical procedures for individuals needing one time or irregular assistance service due to unique circumstances.

Program Background & History

Mission Statement - "To provide quality transportation services that meet the needs of the public and enhance the quality of life of the community."

Motto - "We serve because we care."

Program Structure

Volunteers in Motion is a volunteer-based and cost-free program; neither volunteers nor clients incur expenses. Space Coast Area Transit covers fuel and a maintenance contract with a third- party provider managing vehicle maintenance. Expenses under $1,500 are handled directly by the maintenance company, while Space Coast Area Transit covers any costs exceeding this threshold. Insurance coverage includes both vehicles and volunteers, with volunteers protected under Brevard County's workers' compensation program. Notably, volunteers are not permitted to use personal vehicles for service, ensuring uniformity and liability coverage.

Volunteer positions include vehicle operators who:

- Transport clients throughout Brevard County

- Drop off and pick up clients at medical facilities

- Transport wheelchairs and walkers

- Help clients with shopping and grocery bags

- Drop off and pick up prescriptions.

Source: Volunteers in Motion

Office support staff volunteers answer phones, file, and enter data electronically.
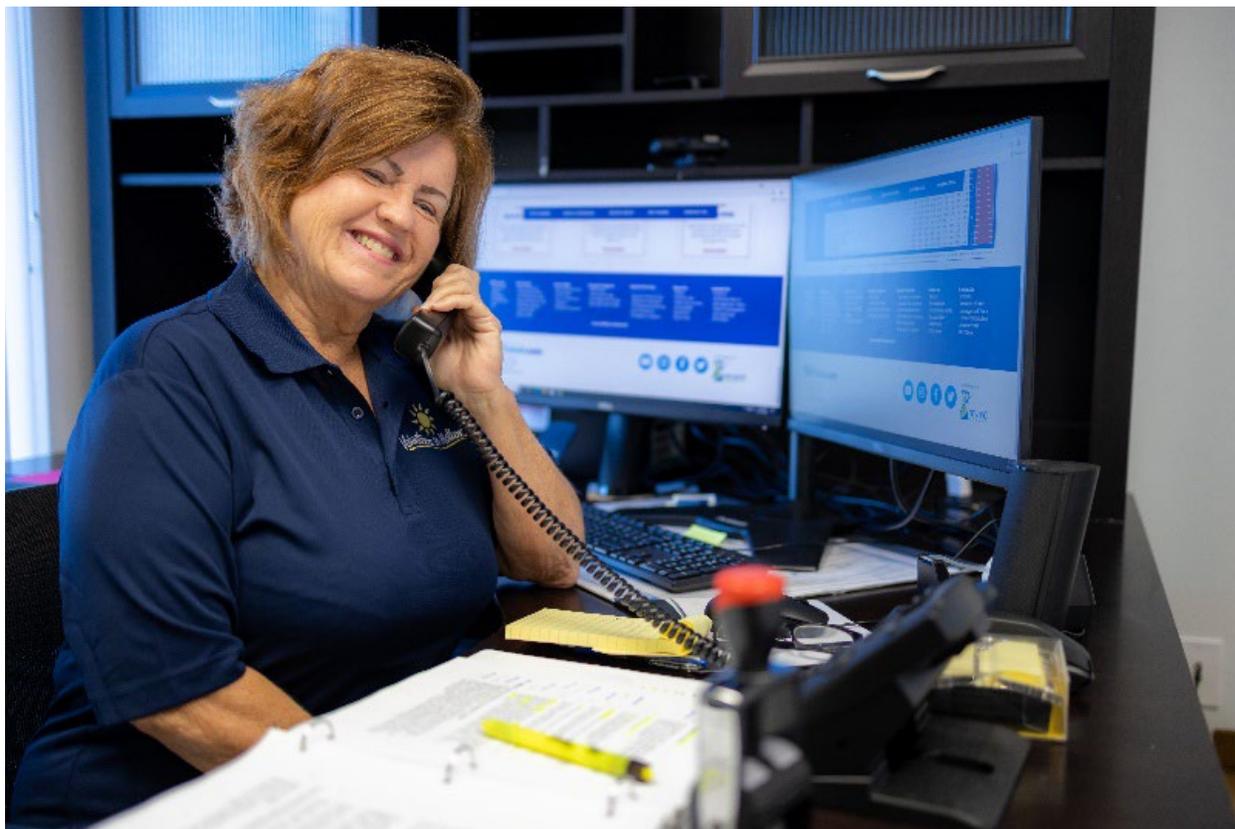
Photo credit: Volunteers in Motion

Volunteers in Motion operates with agency owned vehicles. Initially, the program operated with two vans. Over time, the fleet has expanded to include eight accessible to people with mobility impairment conversion minivans, two mobility vehicles (MV-1) designed for barrier free accessibility, and a 12-passenger small bus for individuals with mobility limitations who cannot be assisted with standard ramps.

The program currently has approximately 20 volunteer drivers, with 15 actively volunteering at any given time. Volunteers provide at least one week's notice regarding their availability, allowing for efficient scheduling. The program completes approximately 350 trips per month. There is a program manager and a paid full time staff assistant that supports administrative responsibilities and serves as a backup driver when needed.

State and Federal awards recognizing this innovative program include: Establishment of a Volunteer Program; Volunteer Transportation Program of the Year; Volunteer of the Year; and a Daily Points of Light Award.

Note: The COVID-19 pandemic had a significant impact on operations. However, while service was limited to essential medical trips, no clients or volunteers contracted COVID-19 during this period. Vehicles were sanitized regularly using a disinfectant with a 10-day effectiveness period that was applied every five days for enhanced protection. While service has largely resumed, ongoing challenges persist due to frequent scheduling changes and cancellations by medical offices, a trend observed consistently over the past year.

Rider Eligibility

Individuals who cannot utilize Space Coast Area Transit services, including paratransit, may qualify for Volunteers in Motion. While almost 100 percent of the program's clients are older adults, eligibility is determined based on lack of ability rather than financial status. The program collaborates with other local transportation organizations and refers individuals to appropriate services when necessary.

Services and Service Area

Volunteers in Motion operates Monday through Friday from 8:30 AM to 5:30 PM. The service is offered at no charge to eligible riders.

The program serves all of Brevard County, though coverage is less comprehensive in Titusville and Barefoot Bay. Volunteers in Motion operates out of two bus terminals located in Cocoa and Melbourne, FL. Given the county's substantial size, 72 miles in length and 14 miles in width, providing comprehensive service remains a challenge. The distance from Cocoa to Titusville, for example, is approximately 20 miles one way. Addressing these service gaps requires additional volunteer recruitment in those areas.

Source: Volunteers in Motion

To improve accessibility in specific regions, Volunteers in Motion has partnered with the City of Satellite Beach Fire Department's Community Paramedic Program.. This collaboration has facilitated connections with prospect volunteers and potential clients in need of a specialized transportation service. The program has also strategically placed two vehicles at Satellite Beach City Hall and a gated community in Viera, FL reducing commute times for volunteer drivers who otherwise need to travel significant distances to access program vehicles. This initiative has enhanced driver retention, particularly among beachside residents who prefer not to commute to the mainland.

Efforts are also underway to establish a similar partnership with the Cocoa Beach Community Paramedic Program to recruit additional volunteer drivers.

Scheduling

The scheduling process is managed through a ride scheduling software. Program vehicles are stationed at multiple locations and trip sheets are distributed weekly to track mileage and usage. Staff members handle fueling and vehicle maintenance, ensuring volunteers feel appreciated and can focus serving their active clientele.

As most volunteers prefer to conclude their shifts in the mornings , riders are encouraged to schedule their medical appointments for no later than 1:30 PM. Any transportation requests after this time are managed mostly by staff members.

Funding

Volunteers in Motion is fully funded by Space Coast Area Transit.

Volunteer Drivers

Program volunteers are provided with on the job training , state-of-the-art vehicles, uniform shirts, and cell phones during volunteering hours. Disabled parking placards are issued to each vehicle.

Driver Eligibility

Volunteers must complete an application (available online), attend training sessions, provide three verifiable references (non-relatives), and submit necessary background information for safety purposes. Brevard County requires a review of driving records and other safety sensitive information.

Recruitment and Incentives

Volunteers in Motion actively recruits drivers through senior fairs, which typically attract approximately 100 attendees per event. Additionally, the program benefits from joint advertising with Space Coast Area Transit through Space Coast Advertising. Quick links to Scheduling A Trip, Successful Trip Tips, and Frequently Asked Questions can be downloaded from 321transit.com/special-services/client-information/.

While no formal incentives are provided, most volunteers find satisfaction and fulfillment in their contributions. Volunteer shifts typically last between two to three hours, with shorter shifts available for beachside drivers.

To foster a sense of community, program staff maintain personalized communication with volunteers. Weekly schedules are finalized on Fridays, with volunteers receiving individualized emails on Sundays. This structured yet flexible system has proven effective in retaining volunteers.

Driver Training

As part of Space Coast Area Transit, Volunteers in Motion follows a structured training model based on ADA complementary paratransit service standards. Volunteers receive Passenger Assistance Safety and Sensitivity (PASS) training at Space Coast Area Transit, supplemented by on-the-job training using a comprehensive 6-page checklist. This hands-on approach allows program coordinators to assess volunteers' capabilities and assign them to appropriate clients based on their comfort level and experience.

Here's What Our Volunteers Say

> "We volunteer once a week and have a wonderful time. The clients are all so appreciative, they just love us! When we come home we feel so good, it's like the best day of our life. It's nothing monetary; it's just a heartfelt thing. Who knows? Maybe one day we'll need someone and they'll be there for us."
> **Katie Smeltzer**

> "I decided to volunteer for the program for my own therapy. I found doing good for other people helped me stop thinking about my own problems. Volunteering time and efforts toward an organization that is helping somebody less fortunate than you is time very well spent. Serving others has helped make me a well-rounded person."
> **Roger Widmann**

> "We evaluated multiple volunteer opportunities, so that we could invest our time in something that provided the maximum value. We saw just how much this program was needed, and the fact that the County provided the vehicles and covered the liability aspect helped seal the deal. But the bottom line is, we really enjoy helping people. And that's what it's all about; people helping people."
> **Jim and Cinda Shanteau**

Photo credit: Volunteers in Motion

Conclusion

Volunteers in Motion continues to be a valuable resource for older adults and individuals with mobility challenges in Brevard County. Through strategic partnerships, dedicated volunteers, and comprehensive support from Space Coast Area Transit, the program remains committed to providing safe, reliable, and compassionate transportation services.

Additional Resources from Volunteers in Motion

- [Space Coast Area Transit: Rider's Guide for Special Services - A Public Transportation Rider's Guide for Eligible Seniors and Transportation Disadvantaged, Including Origin to Destination TD Paratransit Service and ADA Paratransit Service](). - This publication also includes guidance and directions for prospective Riders and Volunteers.

- [Volunteers in Motion]() - A professional video explaining all aspects of the program.

- [Space Coast Area Transit, FY 2023 – 2032 Transit Development Plan]()

WexExpress New Freedom Volunteer Driver Program, Cadillac, Michigan

About WexExpress New Freedom

The [WexExpress New Freedom Volunteer Driver Program](#) began approximately eight years ago when local groups in Wexford County identified significant transportation gaps affecting older adults and veterans. While Wexford County has a hospital, it lacks specialist care. This means that residents must travel to larger medical centers such as the University of Michigan Hospital in Ann Arbor, located three hours away. In response, Cadillac/Wexford Transit Authority's (CWTA) executive director sought funding to expand transit services beyond traditional jurisdictional boundaries, enabling statewide transportation when necessary.

The WexExpress New Freedom program experienced a slow start during its first few months. However, once the program gained visibility and volunteers were recruited, demand increased significantly. Presently, the program provides approximately 300 rides per month.

Note: During the COVID-19 pandemic, the program played a crucial role in transporting individuals to dialysis appointments and facilitating older adult and veteran access to COVID-19 vaccinations. As pandemic-related restrictions lifted, demand surged, reaching 600 rides in a single month.

[WexExpress New Freedom](#) provides rides to non-emergency appointments across Michigan for people needing transportation assistance and options to locations outside of the WexExpress general operating area.

Photo credit: WexExpress New Freedom Volunteer Driver Program

Program Structure

The WexExpress New Freedom Volunteer Driver Program operates under the WexExpress Mobility Coordination Office, in conjunction with the local transit authority.

The program operates with 15 volunteer drivers who use their personal vehicles. Volunteers use their personal vehicles and receive mileage reimbursement. The program maintains a comprehensive insurance umbrella that includes liability coverage for volunteers, ensuring adequate protection for both drivers and passengers.

WexExpress New Freedom provides approximately 5,000 trips annually. The program has three wheelchair-accessible vehicles, including an MV-1 mobility van, ensuring transportation for passengers with mobility challenges. Passengers are permitted to have an attendant accompany them.

However, there are limitations to the services provided. Drivers are not responsible for passengers post-surgery and are prohibited from entering homes due to insurance constraints. This restriction has presented a challenge for passengers who require additional assistance beyond transportation.

Rider Eligibility

The program does not impose strict eligibility restrictions; however, most passengers are older adults (60 years or older) or veterans. A smaller number of individuals with disabilities, including those receiving services through the Michigan Department of Health and Human Services (DHHS), also utilize the service.

While the program prioritizes partnerships to cover passenger costs, individuals who do not qualify for funding assistance may still use the service if they are willing to cover 50 percent of the transportation cost. The program's sustainability depends on volunteer drivers, as incorporating paid drivers would significantly increase operational costs and jeopardize financial viability.

Staff

The WexExpress mobility manager, along with a mobility coordinator, manage complex transit trips for riders with special mobility issues. They determine the most appropriate transportation method whether through volunteers, transit services, or external programs for specialized care such as nursing assistance.

Service, Service Area, and Scheduling

The WexExpress New Freedom Program provides transportation services for riders who need transportation options beyond those available by other WexExpress services to get to non-emergent appointments across Michigan.

WexExpress New Freedom trips are scheduled by request only. For individuals with mobility challenges, the organization provides accessible vehicles.

Note: WexExpress provides door-to-door service for all of Wexford County with regular regional connections to Tustin (Oceola County) and Traverse City (Grand Traverse County).

Funding

An [FTA Section 5310 Enhanced Mobility of Seniors and Individuals with Disabilities](#) grant, previously known as a New Freedom grant, covers 50 percent of these costs, while the remaining half is funded through partnerships with local organizations, including the Wexford County Council on Aging, the Area Agency on Aging, Wexford County Veterans Services, and other waiver programs. The Section 5310 grant also covers approximately 75 percent of the mobility manager's salary.

The Section 5310 grant has been a consistent funding source, secured annually through proper application and compliance. WexExpress successfully qualifies by adhering to the Michigan Department of Transportation's grant requirements. However, recent decreases in the amount of funding that the state can make available to local transportation programs, like WexExpress New Freedom, pose additional challenges for securing financial support.

Volunteer Drivers

Driver Eligibility

WexExpress Mobility Coordination Office staff conduct background checks, driver's license verification, and hands-on training, including wheelchair securement procedures. If a driver has difficulty with learning tasks associated with securement, the office's mobility coordinator provides additional on-the-road training.

Recruitment and Incentives

Volunteer recruitment efforts primarily target older adult and veteran communities through partnerships with the Council on Aging, trade shows, senior expos, networking events, and advocacy groups. Advertisements are also placed in senior center newsletters to attract potential volunteers. Many of the program's drivers are retirees seeking meaningful volunteer opportunities.

Volunteers receive mileage reimbursement and are recognized during an annual appreciation event, where they are invited to bring a guest. Drivers are acknowledged for their contributions and receive practical gifts related to their work, such as trunk organizers, blankets, and vehicle maintenance

supplies. During the COVID-19 pandemic, the program provided safety kits, including wipes, gloves, and hand sanitizer. Additionally, all volunteer vehicles undergo safety inspections conducted free of charge by a local mechanic, who certifies the vehicles as safe for operation.

Driver Training

In addition to the training described above, all volunteer drivers undergo Community Transportation Association of America (CTAA) Passenger Assistance Safety and Sensitivity (PASS) training.

Conclusion

The WexExpress New Freedom volunteer driver program has significantly improved mobility for older adults, veterans, and individuals with disabilities, bridging transportation gaps in Wexford County and beyond.

Additional Resources from WexExpress New Freedom

- [FTA Section 5310 Enhanced Mobility of Seniors and Individuals with Disabilities](#)
- [FTA Circular C9070.1H - Enhanced Mobility of Seniors and Individuals with Disabilities Program](#)
- [New Freedom Volunteer Driver Program (Mobility Coordination Services)](#) and [WexExpress Mobility Coordination Office](#).
- NADTC Case Study: [Small Town, Big Impact](#)
- [WexExpress and Dynamic Physical Therapy Partnership Video](#)
- [No-Show Policy, WexExpress, 2018](#)

Nevada Rural Counties Retired and Senior Volunteer Program (Nevada RSVP), Carson City, Nevada

About Nevada Rural Counties RSVP Program, Inc. (Nevada RSVP) Program

For over 50 years, the Nevada Rural Counties RSVP Program, Inc. (Nevada RSVP) has been a trusted nonprofit serving older adults, individuals with disabilities, and veterans across rural Nevada.

Founded in 1972 by Janice Ayres, Nevada RSVP began with just eight volunteers and a vision of neighbors helping neighbors. Today, the program has 118 volunteer drivers. Nevada RSVP remains rooted in local communities, working in collaboration with senior centers, healthcare providers, county agencies, and local volunteers to tailor services to the unique needs of each area. Nevada RSVP is affiliated with AmeriCorps/Senior Corps.

Transportation is one of the greatest barriers to independent living in rural areas. Without access to public transit or reliable rides, many older Nevadans are at risk of missing medical appointments, experiencing food insecurity, or becoming socially isolated. Nevada RSVP addresses this challenge through a robust, multi-county transportation program that operates in 15 of Nevada's 17 counties, everywhere except Clark and Washoe. Their team coordinates a combination of fleet vehicles and volunteer drivers using personal vehicles to ensure that clients can get to medical appointments, grocery stores, pharmacies, social outings, and more.

In rural areas where access is a daily challenge, RSVP's transportation program is more than just a ride, it's a lifeline. Volunteer drivers may assist clients at the door to and from their homes, and accompany clients in picking up their prescriptions, out to lunch or the senior center, and to share conversation. Whether traveling from Ely to Salt Lake City for specialized medical care, or from rural Churchill County to Reno for a surgical follow-up, RSVP clients rely on these services to stay healthy, connected, and independent.

In 2024, volunteer drivers drove 33,500 miles using their own cars. In addition, over 7,100 escorted trips, covering more than 189,000 miles were completed in RSVP fleet vehicles, bringing the total number of clients served to more than 580 older adults and individuals with disabilities.

Nevada RSVP provides escorted, door-to-door transportation for those who would otherwise be unable to access essential care and resources through its Independent Living Transportation Program. Their programs also include Homemaker Services, Respite Care, Senior Companionship, and Emergency Response Systems (PERS), all designed to support independent living.

Photo credit: Nevada RSVP

Nevada RSVP's Mission Statement – Their mission is simple yet profound: to help seniors and adults with disabilities remain independent, safe, and connected to their communities through lifesaving volunteer-powered services.

Program Structure

Nevada RSVP serves as the host agency, overseeing all administrative functions, including data management, time sheets, and applications. The program's database is web-based, allowing field offices to access relevant information. The main office is located in Carson City, with field offices in Winnemucca, Elko, Ely, Pahrump, Fallon, Hawthorne, and Tonopah.

Nevada RSVP's transportation program is flexible and demand-responsive, rather than true paratransit, allowing clients to request rides for essential needs.

Nevada RSVP's fleet includes 17 vehicles, many of which are wheelchair accessible. Additional vehicles are expected to join the fleet later this year.

With additional fleet vehicles on the way and increased demand in counties like Elko, Nye, and White Pine, Nevada RSVP is expanding. The program is committed to scaling operations sustainably.

Note: During the COVID-19 Pandemic, user participation declined significantly as clients hesitated to leave their homes. To address this, RSVP hired individuals to perform grocery shopping for clients. Due to health concerns, only one passenger was allowed in each fleet vehicle, and personal vehicles were not used.

Rider Eligibility

RSVP transportation services are available to:

- Older adults (60 years or older)
- Persons with disabilities (ages 18 to 59) who must provide verification of disability status through Social Security Disability Income (SSDI) documentation.

Services, Service Area, and Scheduling

Riders are asked to call in advance to schedule rides. Service Coordinators work closely across counties to coordinate the resources needed to efficiently to schedule a ride with one of Nevada RSVP's volunteer drivers.

Nevada RSVP transportation services operate Monday through Friday, 8 AM to 3 PM on a structured schedule, offering consistent trips to designated locations, with extended hours or exceptions made in special cases.

Nevada RSVP operates in 15 of the 17 counties in Nevada: Carson City, Churchill, Douglas, Elko, Esmeralda, Eureka, Humboldt, Lander, Lincoln, Lyon, Mineral, Nye, Pershing, Storey, Washoe and White Pine. The service does not operate in Washoe or Clark counties.

Photo Credit: Nevada RSVP

Funding

Nevada RSVP is affiliated with AmeriCorps Seniors and benefits from state and federal funding through:

- Nevada Department of Transportation (NDOT) - FTA Section 5310 Enhanced Mobility of Seniors and Individuals with Disabilities and Section 5311 Formula Grants for Rural Areas
- State of Nevada Aging and Disability Services Division (ADSD)
- Funds for a Healthy Nevada (Department of Health and Human Services)
- Foundation grants and donations

Nevada RSVP is powered by its volunteers, many of whom are seniors themselves, giving back to their communities. In 2024, their volunteers collectively contributed more than **7,000 hours** through their transportation program alone.

RSVP requests a $10 donation for local trips and $20 for trips exceeding 50 miles, though these contributions are infrequent. ADSD and NDOT operational grants are awarded on a biennial basis.

Volunteer Drivers

Volunteer drivers receive mileage reimbursement and regular recognition through annual luncheons and holiday gift packages. They undergo orientation, background checks, and optional paratransit safety training to ensure the highest level of service and care.

Volunteer drivers may:

- Provide rides to medical, dental, and eye appointments
- Deliver food and medications
- Take clients grocery shopping and banking

Driver Eligibility

RSVP requires that volunteer drivers:

- Have automobile insurance equal to the minimum limits required by the State of Nevada (for drivers who use their own vehicles).
- Pass a background check before placement on first assignment.
- Complete [Nevada Care Connection's Adult Protective Services Training and Quiz](#).

Driver Recruitment and Incentives

Recruitment efforts include:

- Posting flyers
- Encouraging word-of-mouth referrals from current volunteers
- Branding fleet vehicles for public visibility
- Promoting services at senior centers
- Conducting speaking engagements at churches, senior lunches, and community events

Business partnerships have not yielded significant volunteer interest, but in-person outreach has proven effective.

To recognize volunteer contributions, RSVP provides:

- An annual appreciation luncheon in December with raffle prizes, certificates, and gifts.
- Holiday gift packages containing donated items such as coffee gift cards and gas cards.
- Periodic surprise gifts when funding permits.

Driver Training

New drivers undergo an orientation as part of the onboarding process. All volunteers receive paratransit certification, although it is not a mandatory requirement. Additional training opportunities are available through the Nevada Department of Transportation, though participation is optional.

Photo credit: Nevada RSVP

Conclusion

Nevada RSVP continues to provide essential transportation and support services to Nevada's older adults and persons with disabilities, adapting to evolving needs while maintaining its commitment to volunteerism and community engagement. The program is also expanding. With additional fleet vehicles on the way and increased demand in counties like Elko, Nye, and White Pine, Nevada RSVP is committed to scaling its operations sustainably.

Additional Resources from Nevada RSVP

- [FTA Section 5310 Enhanced Mobility of Seniors and Individuals with Disabilities](#)
- [Section 5311 Formula Grants for Rural Areas](#)
- [Nevada RSVP Volunteer Forms](#)
- [RSVP Volunteer Application](#) (includes the RSVP Code of Ethics)
- [Nevada Care Connection's Adult Protective Services Training and Quiz](#)
- [Veterans Volunteers in Partnership (Veterans VIP) Program](#) - Nevada Rural Counties RSVP Program Inc. expanded its services to include a dedicated Veteran's program.

Ride Connection, Portland, Oregon

About Ride Connection

Founded over 35 years ago as a volunteer-run organization, Ride Connection emerged from the need to provide mobility services to older adults and individuals with disabilities before the enactment of the Americans with Disabilities Act (ADA). Initially, the program collaborated with senior centers that had wheelchair-accessible vehicles. Over time, it expanded into a comprehensive agency offering multiple transportation services.

Ride Connection's services primarily cater to individuals aged 60 and over or those with disabilities. Programs include volunteer transportation, travel training to teach public transit use, a gas reimbursement program for family caregivers (Ride Together), RideAbout shuttle services for social and shopping trips, and Community Connector fixed-route shuttles filling gaps in city transit. Additionally, the agency offers guided social outings for older adults.

Ride Connection is a network of agencies dedicated to serving older adults, individuals with disabilities, low-income individuals, and the general public with transportation services in Clackamas, Multnomah, and Washington counties. The network provides over 300,000 rides annually and supports more than 2,000 individuals through training and access to public transportation.

Photo credit: Ride Connection

Ride Connection's Mission Statement: "To link accessible, responsive transportation alternatives with individual and community needs" Ride Connection, About Us

Ride Connection's Land Acknowledgement – "Ride Connection acknowledges that our facilities are situated on the traditional village sites of the Multnomah Wasco, Cowlitz, Kathlamet, Clackamas, Bands of Chinook, Tualatin Kalapuya, Molalla, Clackamas, and many other Indigenous nations of the Columbia River, who have called this place home long before the arrival of white colonizers (Portland Indian Leaders Roundtable, 2018). We honor and recognize the enduring relationship between Indigenous peoples and their territories." Ride Connection, About Us

Program Structure

Ride Connection manages its volunteer driver program internally. The organization's volunteer manager works with other outreach team members to recruit and screen volunteer drivers. Volunteers undergo a DMV and background check and comprehensive training before being assigned to program managers based on their location. Program managers oversee daily operations, ensuring volunteers provide service within their respective communities.

The Portland metro area is divided into eight regions, each with designated volunteer ride providers. Ride Connection acts as the "parent" agency, serving as the primary transportation provider in some areas and a supporting agency in others. Volunteer drivers either use their personal vehicles (with mileage reimbursement) or agency vehicles, of which there are approximately 40 available.

The Ride Together program has around 45 volunteers, while the general volunteer driver program has approximately 70 participants. The number of rides provided monthly is managed by operations, with overall services spanning the tri-county area through agency partnerships.

Rider Eligibility

Riders are primarily older adults (individuals 60 years or older) or self-identify as having a disability to qualify for Ride Connection services.

Services, Service Area, and Scheduling

The Ride Connection network offers a variety of transportation options in Clackamas, Multnomah, and Washington counties. Travel option counselors conduct initial intake screenings, gathering information on mobility needs to match individuals with appropriate services. Ride Connection offers door-to-door assistance and helps manage ride cancellations through automated reminders and subscription ride services.

Most services are available Monday through Friday. The hours, availability, and days of service may vary.

Riders are asked to schedule rides at least four business days in advance. Established customers can request an online account to request rides via the Ride Connection website.
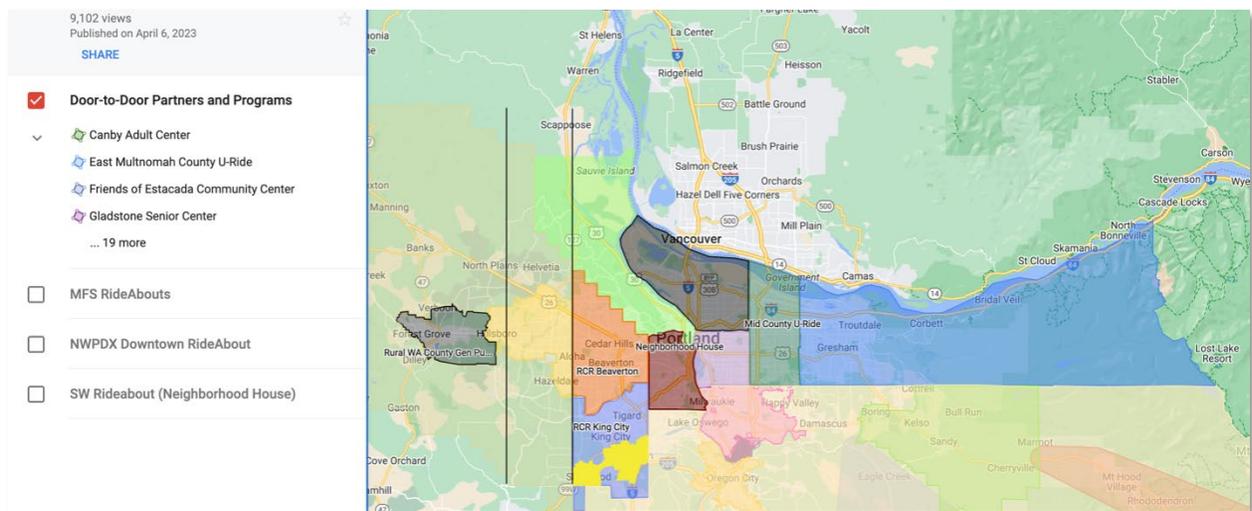
Photo credit: Ride Connection

Funding

Ride Connection receives funding from a combination of public and private sources, including:

- **Public Funding:** TriMet, Metro, state and federal transportation dollars ([FTA Section 5310 Enhanced Mobility of Seniors and Individuals with Disabilities](#)), and the Statewide Transportation Improvement Fund (STIF)

- **Private Funding:** Grants from healthcare organizations such as Providence Healthcare, Legacy Health, and Care Oregon

Volunteer Drivers

"Why volunteer? The simple act of getting someone where they need to go can be an incredibly rewarding experience. We rely on caring and compassionate volunteer drivers to provide valuable rides to the people in our community who need it most." Ride Connection's Volunteer Website

Volunteers can drive their own vehicle or an agency-owned vehicle. Requirements for volunteer drivers include:

- A valid driver's license and 5+ years of driving experience.
- Completing our volunteer application and interview process.
- Ability to pass a criminal background and DMV check.
- Completing training courses provided by Ride Connection (available in classroom or online).

Ride Connection's Transportation Operations Manual is available online on the program's Reports webpage and contains valuable information about how the organization manages its program including, driver qualifications, driver selection process, interviewing, disqualification, and performance evaluations.

Driver Recruitment and Incentives

Driver recruitment efforts include outreach fairs, presentations at senior centers and civic organizations, newspaper ads, public radio station advertisements, and word-of-mouth referrals.

Incentives for Drivers:

- Mileage reimbursement for personal vehicle use
- Defensive driving courses that may lower insurance rates
- Volunteer appreciation events
- Many volunteers serve without expecting additional incentives, motivated by the impact of their work

Note: Despite past volunteer numbers nearing 200, the COVID-19 pandemic significantly reduced participation, and the program is currently rebuilding its volunteer base.

Driver Training

Ride Connection offers a structured training program for volunteers, including:

- Defensive driving (in-house)
- Best Ride (customer service skills)
- Bloodborne pathogens training

Source: Ride Connection

- Road testing with training staff
- Additional wheelchair securement training for drivers of accessible vehicles

Conclusion

Ride Connection continues to evolve, providing essential mobility services to underserved communities while fostering a dedicated network of volunteer drivers.

Additional Resources from Ride Connection

- [Rural Washington Door to Door Service Fact Sheet](#)
- [Ride Connection Rider Service Guide](#)
- [Ride Connection's Operation Manual](#)
- [Ride Connection's Annual Reports for 2012 thru 2023](#)

Drive a Senior, Austin, Texas

About Drive a Senior

In 2025, three volunteer driver programs with very similar cultures and philosophies joined forces to create one unified organization, Drive a Senior, to serve areas in and around Austin, Texas. At the time that this Toolkit was published, the process of merging the agencies and their individual resources was still in process. This case study focuses on how the newly unified organization, Drive a Senior, will be stronger and more sustainable while remaining true to the original mission of each of the three legacy organizations.

The merged organizations, Senior Access, Drive a Senior ATX, and Chariot, had much experience and long histories of providing transportation services for older adults. They also shared a common purpose of responding to the needs of an increasing number of seniors who were living alone and who could no longer drive in their communities.

Founded in 1993, Senior Access had been providing transportation services for older adults for more than 30 year prior to merging with Drive a Senior ATX and Chariot. A faculty member of St. Edward's University in Austin, Texas, Sister Madeline Sophie Weber, and one of her graduate students helped coordinate the early volunteer driver programs that were later to become Drive a Senior ATX (1985) and Chariot (1988).

Read more about the history behind Drive a Senior ATX, Chariot, and Senior Access on their respective websites.

Drive a Senior's Executive Director describes the merger as bringing together the people, the resources, and the passion of the three legacy organizations, to:

- Reach more older adults across Central Texas
- Remove more barriers to independence
- Provide even greater access to transportation and support services

Photo credit: Drive a Senior/Senior Access

Photo credit: Drive a Senior/Chariot

The unified organization's new mission statement reflects the values of the individual mission statements that came before:

- "Enabling older adults to live independently, avoid social isolation and age in place by providing volunteer-based transportation and other support services at no cost." Drive a Senior ATX, Our Mission

- "Chariot enriches lives and communities by providing transportation and socialization to non-driving older adults, helping them to age in place." Chariot, About Us

- "We provide free transportation and support services that enhances independence and quality of life for all of our Senior clients." Senior Access, Home

Drive a Senior Mission Statement - "Helping older adults live independently, avoid social isolation, and age in place by providing transportation and other support services."

Merging the Programs and Program Structure

The successful merger of three volunteer driver programs, Senior Access, Drive a Senior ATX, and Chariot depended, in part, on the clients and volunteers of the legacy organizations being aware of the upcoming change. A consistent and reassuring message about the upcoming merger was displayed on the opening page of each of the legacy volunteer driver program's websites.

Photo credit: Drive a Senior/Drive a Senior ATX

Photo credit: Drive a Senior/Chariot
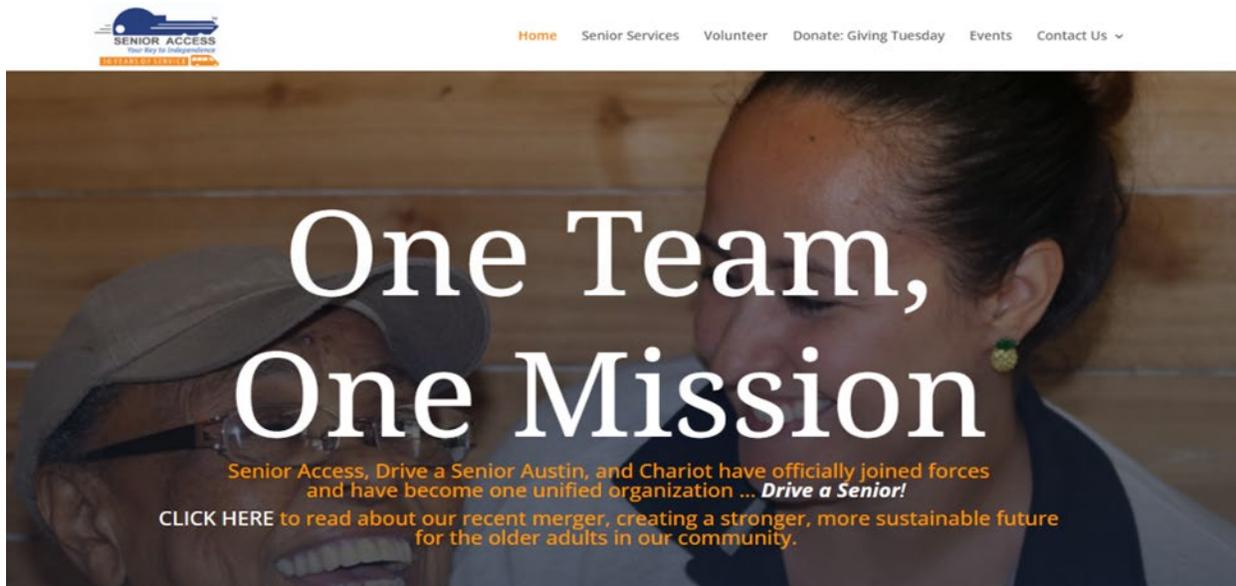
Photo credit: Drive a Senior/Senior Access

Like its predecessors, Drive a Senior is a 501(c)(3) nonprofit organization in Central Texas providing essential, free transportation services for older adults. Drive a Senior has a 17-member Board of Directors with members drawn from the legacy programs.

The administrative and leadership staff include an Executive Director, Program Director, Volunteer Director, Development Director, and Finance Manager. Drivers and Service Coordinators from each territory continue to serve clients in their legacy agency's dedicated areas of service.

The program follows a volunteer-driver model, actively recruiting individuals to transport older adults (65 years or older) who are no longer able to drive. Services cover essential needs such as medical appointments, dental visits, grocery shopping, and voting. Social trips, including shopping, lunch, and other group outings are also available.

Service Breakdown:

Drive a Senior currently has about 500 volunteers and serves about 1,900 clients across the service areas of the three legacy agencies. At the time of publication, the service breakdown for the newly unified organization was not available. However, a snapshot of combined monthly data from September 2025 shows that of 1,140 rides provided:

- 21% were van rides (236),
- 18% were covered by rideshare (212), and
- 61% were covered by volunteers (692)

Vehicle Fleet:

In addition to rides provided by volunteers who use their own vehicles, Drive a Senior will also utilize vehicles owned by the legacy programs and driven by paid staff drivers.

- **Chariot** has seven vehicles, including four passenger vans (each seating up to 15 people, similar to hotel shuttle vans) and three SUVs (Jeep Cherokee and Ford Escape, and Toyota Sienna) designated for passengers with special needs. Chariot was recently selected by a church partner for fundraising efforts to acquire a new SUV (Toyota Sienna).
- **Drive a Senior ATX** has one passenger van and one small SUV driven by paid staff.
- **Senior Access** has five vans that are driven by paid staff.

Currently, none of the vehicles, including those used by third-party services, are wheelchair-accessible vehicle (WAV). If a client requires a WAV vehicle, they are referred to CapMetro or Capital Area Rural Transportation System (CARTS); both are regional public transportation providers.

Rider Eligibility

Drive a Senior, serves adults who:

- Are age 65 and over
- Are non-driving or limited driving (feel uncomfortable driving)
- Live in their own residence or live in a senior living community where they do not have access to transportation services
- Live within the boundary of a Drive a Senior service area
- Are able to walk on their own or with walkers or canes (volunteers cannot transport wheelchairs or lift clients in any manner)
- Prospective clients can register independently or through a family member. A completed client packet is required.

Note: People aged 65 and older are the fastest-growing age group in Austin. (Age of Change: Austin's Transforming Demographics 2010-2020, City of Austin Planning Department.)

Services, Service Area, and Scheduling

Drive a Senior services include:

Individual Rides – Drive a Senior provides free door-to-door service, if a volunteer is available. Ride requests can be one-way or round-trip. Clients must call in their ride requests in advance. Ride requests are taken Monday through Thursday 9 AM – 4 PM and Friday 9 AM – 2 PM.

Operating Hours:

- Monday through Thursday 9 AM – 4 PM
- Friday 9 AM – 2 PM
- Last ride requests are taken at 4 PM to allow volunteer drivers adequate time to return home.
- For medical rides to be guaranteed with rideshare, appointment should begin and end within Drive a Senior office hours as staff are required to schedule and monitor rideshare rides.

Errands: Clients can request errands at any time of the day and on weekends. Errands are not rideshare guaranteed but an effort is always made to cover such requests with volunteers. If a volunteer is not assigned to an errand, the client is notified so that they can make other arrangements.

Community Rides – Prior to the merger, each of the legacy programs provided group transportation services using vans to take clients to various destinations including grocery stores, shopping centers, and on special "field trip" rides to other places of interest. These rides will continue with Drive a Senior and may originate from both residential locations and community centers.

Third-Party Transportation: When volunteer or staff drivers are unavailable, Drive a Senior will utilize third-party services or rideshares like Lyft, and ZTrip. In urgent situations, such as a same-day medical appointment, third-party rides are used.

Service Area: As a unified organization, Drive a Senior provides rides across Travis County, part of Hays County, and the cities of Elgin, Round Rock, Pflugerville, Hutto, Manor, and Dripping Springs. The program also serves South Austin, Southeast Austin, and the cities of Bee Cave, Lakeway, and Westlake.

The combined service areas of the unified organization, Drive a Senior, are shown in the figure below:
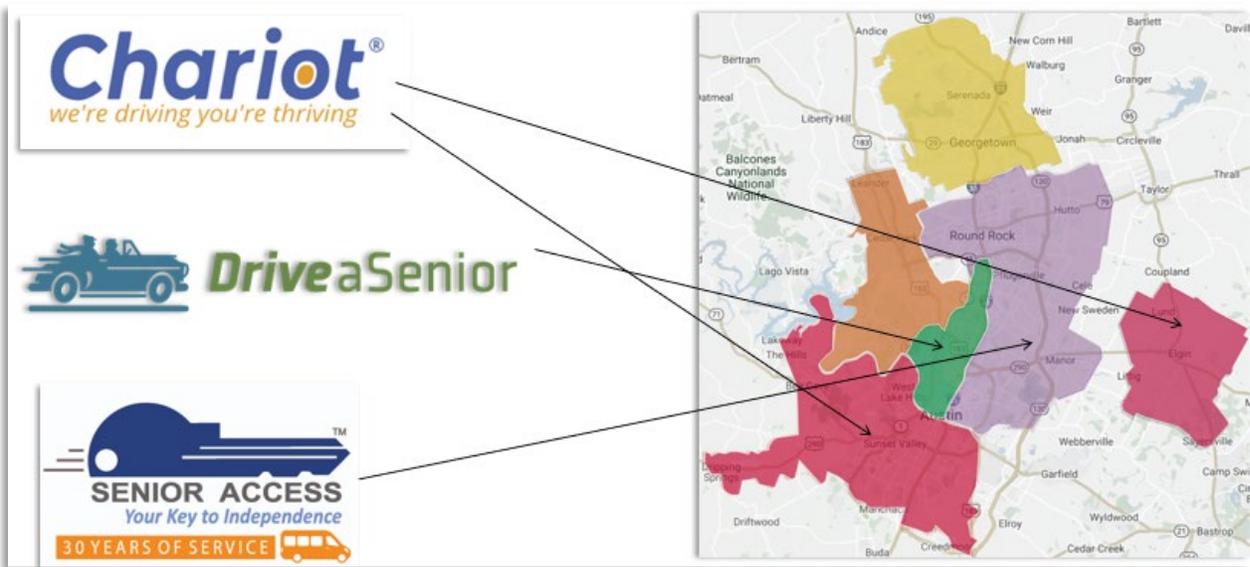
Photo credit: Drive a Senior/Austin-Area Nonprofit Organizations Providing Senior Transportation

Scheduling:

Drive a Senior clients are asked to request rides at least three days in advance.

Drive a Senior volunteers are able to choose the rides that they would like to provide. Volunteer drivers log into the scheduling software to review open ride and service requests. Details on the client/trip are also available. To accept a ride, the volunteer drivers clicks on the client's name and then select "assign me as driver". After the ride is complete, drivers MUST log back in to "close out" the trip. Drivers record number of miles driven and how much time was spent.

Funding

The purpose of merging Senior Access, Drive a Senior ATX, and Chariot into one, unified organization was to combine their individual resources, including funding, to create stronger and more sustainable community services for older adults.

Examples of the types of funding to be combined include:

- FTA Section 5310 Enhanced Mobility of Seniors and Individuals with Disabilities
- Private foundations
- Individual donations
- Worship and civic organizations
- Corporate contributions
- Fundraising events

Volunteer Drivers

Photo credit: Drive a Senior/Senior Access

Volunteer drivers use their own cars to provide door-to-door rides to medical appointments, grocery stores, hair appointments, pharmacies, banks, activity centers, support groups, and other errands. Typically, a round trip takes 2-3 hours; a one-way drop off is about an hour.

Volunteer drivers must:

- Be 18 years of age with a high-school diploma or equivalent.
- Provide a valid driver's license and car insurance.
- Pass background and driver record checks.
- Attend a brief orientation and training session.

A partnership agreement with engAGE Travis County provide up to $25.00 in mileage reimbursement for registered volunteer drivers over 50 who drive at least 125 miles each month.

The onboarding process for new volunteers is relatively straightforward, requiring proper documentation, and completion of a volunteer orientation and completion of an online training & registration course, which includes:

- Providing copies of a valid driver's license and active car insurance.
- Choosing the way(s) in which they want to volunteer.
- Letting us know how often you would like to volunteer (there are no time requirements!).
- Providing information and sign an authorization form for a background check.

Instruction is also provided on how to access Drive a Senior's online platform (which allows volunteers to select rides to fit their own schedules). Rides can be set up by phone or email.

Driver Recruitment and Incentives

Recruiting new volunteer drivers is an ongoing challenge. Drive a Senior is exploring ways to enhance engagement, including targeted outreach efforts through community event organizers and healthcare providers. The following images are examples of successful volunteer recruitment efforts.

Photo credit: Drive a Senior/Chariot (Touch a Truck Event 2024, Elgin, Texas)

Chariot's 2025 Volunteer Driver Recruitment videos are produced in English and Spanish. See Chariot's videos on YouTube.

Photo credit: Drive a Senior/Chariot

Senior Access' volunteer videos for provide future volunteers with a review of the organizational requirements and processes. They also give volunteers an idea of what a typical trip may include.
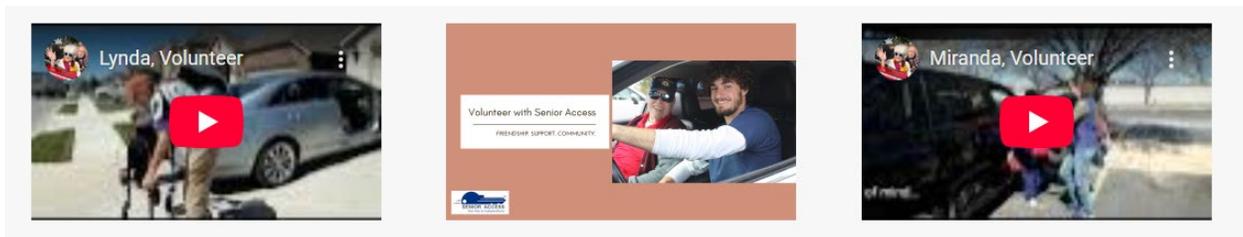
Photo credit: Drive a Senior/Senior Access

Driver Training

[Drive a Senior provides a brief virtual training and registration course](#) for its volunteer drivers. Upon passing a background and driving record report, and completion of this training session, volunteer drivers can begin driving for clients.

Conclusion

All three of the programs that now make up **Drive a Senior** have rich histories in Central Texas.

The unification of these three agencies represents a commitment to serve even more older adults across their service area, with future efforts to expand into territories with a lack of transportation options for older adults.

As our population rapidly ages, Drive a Senior's vision is to ensure no senior is left behind because of transportation barriers or isolation. They believe all older adults should have the opportunity to stay connected, feel valued, and age in place with dignity.

Additional Resources from the Drive a Senior Programs

- [Age of Change: Austin's Transforming Demographics 2010-2020, City of Austin Planning Department](#)
- [Chariot, *we're driving you're thriving* Strategic Plan 2025 - 2028](#)
- [Chariot, *we're driving you're thriving* 2023 Annual Report](#)
- [Chariot Financial Reports 2020 - 2023](#)
- [Chariot's 2025 Volunteer Driver Recruitment](#)
- [Chariot's videos on YouTube](#)
- [Drive a Senior](#)
- [Drive a Senior ATX](#)
- [Senior Access](#)

King County Metro Community Van, Seattle, Washington

About King County Metro (Metro) Community Van

[King County Metro (Metro)](#) [Community Van](#) program was initially developed as a pilot demonstration project in 2016 in response to an identified need for areas of the county where land use, population density or topography and infrastructure is not compatible with traditional fixed route expansion or in areas where fixed route service has been reduced due to low ridership or other factors. Designed to offer flexible and customized transportation options, the service supports travel needs in areas where traditional bus service may not be available.

The program actively partners with nonprofits serving Black, Indigenous, People of Color (BIPOC), immigrant and refugee populations, individuals with disabilities, limited-income households, and those with language access needs. These relationships support inclusive service delivery, offering in-language trips, flexible scheduling, and access to destinations beyond the fixed-route network. King County Metro remains committed to addressing the evolving transportation needs of King County's diverse and growing population.

The [Metro Community Van](#) (Community Van) Program is a reservation-based, rideshare service that is a volunteer-driven transportation service. Dependent on volunteer driver availability, trips can occur 24 hours a day, seven days a week. Eligible trips must begin in the city the van is assigned to and may not be greater than a two-hour distance of the van's pickup location and be completed on the same day. Community Van currently operates in 18 cities and unincorporated areas throughout King County, with vans strategically placed to ensure accessibility and ease of use for residents across the region.
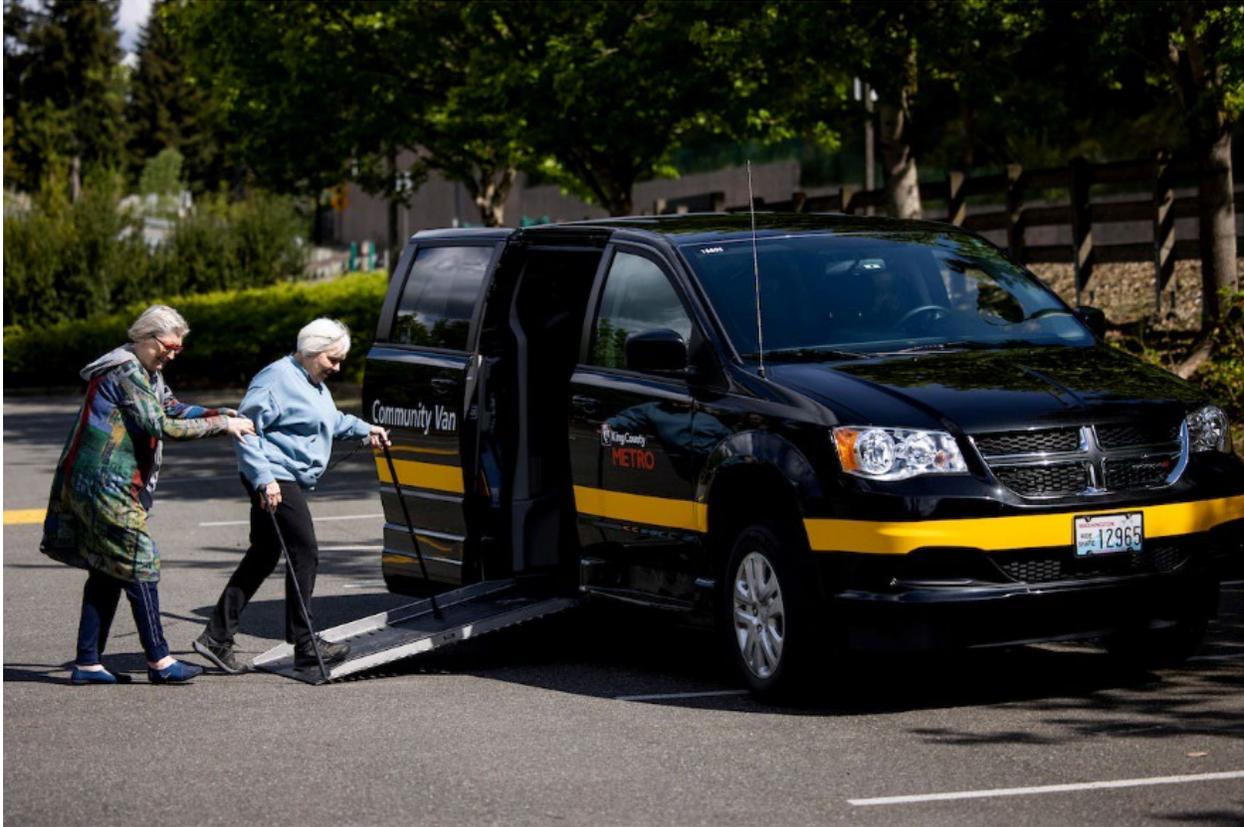
Photo credit: King County Metro Community Van

Mission Statement – [King County Metro (Metro)](#) King County Metro's mission is to provide the best possible public transportation services and improve regional mobility and quality of life.

Community Van reflects Metro's commitment to meeting King County's evolving transportation needs by bridging service gaps, promoting equity, and offering flexible, community-driven options. The program advances Metro's broader goals of sustainability, accessibility, and inclusive mobility, as outlined in the [King County Metro Strategic Plan](#).

Program Structure

King County Metro provides the vehicles, fuel, insurance, and program oversight, including volunteer driver training and safety monitoring. Individuals aged 21 and over with a valid Washington State driver's license who meet the program's eligibility criteria may apply to serve as volunteer drivers. All drivers must complete the required training before conducting their first trip. Community Van currently operates in 18 cities and unincorporated areas throughout King County, with vans strategically placed to ensure accessibility and ease of use for residents across the region.

King County Metro contracts with local community partners in participating jurisdictions who have strong community ties to support the delivery of the Community Van program. Metro funds a 0.50 Full-Time Equivalent (FTE) Community Transportation Coordinator (CTC) in each jurisdiction.

Partners include the University of Washington Bothell Campus, City of Bothell, Woodinville, Kirkland, Algona, and the Vashon Chamber of Commerce. Where local partners are unavailable, [Hopelink](#) is the contracted provider that supports five jurisdictions. Some partners combine Metro

funding to support full-time staff, while others maintain a dedicated part-time CTC role focused solely on Community Van operations.

CTCs handle the day-to-day coordination of the program, including outreach, relationship building, volunteer driver recruitment, trip planning, vehicle scheduling, fare collection, and reporting. They also collaborate with Metro on vehicle maintenance and promote the program through local events and community engagement.

Vehicle Types and Community Distribution

Each participating community has access to a combination of vehicle sizes. Communities are equipped with 6-passenger accessible vans and 12-passenger vans, while some also offer 7-passenger vans to accommodate mid-sized groups.

Photo credit: **Community Van - [How to Use Community Van](#)**

Rider Eligibility

Community Van is open to all members of the public for non-commute group trips ranging from two to eleven passengers. There are no age or income restrictions; however, youth under 13 must be accompanied by an adult.

By eliminating eligibility barriers and not requiring proof of need, Community Van ensures equitable access to transportation. Ride requests are accommodated on a first-come, first-served basis.

Services, Service Area, and Scheduling

Services - Community Van provides shared, non-commute group rides to destinations throughout the day, evenings, and weekends. Vans are available 24/7 if vehicles and volunteer drivers are available.

Fare Structure:

- $2.70 per general rider

- $1.00 per senior rider

- Youth - Youth 18 and under ride for free.

Riders must follow child seat laws and submit a child rider agreement for unaccompanied minors.

Service Areas - Each trip must originate in the jurisdiction the van is assigned to, though additional riders may be picked up along the route. See the complete list of jurisdictions in *Program Structure* above.

Trip distance - Trips may extend up to two hours from the origin point and must be completed on the same day. Eligible trips must begin in the city the van is assigned to and may not be greater than a two-hour distance of the van's pickup location and be completed on the same day; overnight travel is prohibited.

Scheduling - Trip requests are submitted via phone or email to the local CTC or through the Schedule a Ride Request Form, where available. Requests that fall outside standard criteria are reviewed case-by-case by the program manager.

Trips must be pre-scheduled with the CTC in the assigned jurisdiction at least two business days in advance. All trips must begin and end within the same jurisdiction.

Riders may request one-time or recurring trips, join existing rides if space is available, and coordinate minor route adjustments through the CTC.

Funding

The program is fully funded by King County Metro through local and state resources under the public transit budget. Community Van partners with cities and transit stakeholders, who benefit from contractual funding for CTCs, which supports staffing, coordination, and local outreach efforts.

Volunteer Drivers

Volunteer drivers must be at least 21 years old and hold a valid Washington State driver's license. Applicants must meet King County Metro's driver eligibility criteria and complete the required training before their first trip. Prospective drivers should allow approximately two weeks for the application, background check, and training process to be completed.

Recruitment and Incentives

Volunteer Recruitment - Volunteer recruitment is conducted through social media, community partners, and word-of-mouth. CTCs join in community events and activities to promote the service and other Metro transit options available in the community. Metro launched guides in 2021 to support new riders and drivers.

Volunteer Incentives - Each partner celebrates volunteers in a variety of ways such as group celebrations, small tokens of appreciation, and volunteer recognition on social media for their contributions.

Driver Training

Volunteer Driver Training Includes:

- **Accessible Equipment & Disability Awareness (AEDA) Training** - Hands-on, in-person course covering vehicle equipment, accessibility, and passenger assistance.

- **Wheelchair Securement Training** - Required component of AEDA focused on safely transporting passengers using mobility devices.

- **Online Orientation** - Program expectations, procedures, and safety guidelines overview.

Photo credit: **Community Van - North Bend:**

Conclusion

King County Metro's Community Van Program continues to address transportation gaps with innovative, community-led solutions. With Metro's support, the dedication of CTCs and volunteers, along with the valued relationships built with community members and organizations, the program enhances mobility and access across King County.

What sets Community Van apart is its human-centered, unique approach of neighbors helping neighbors. Whether it's a volunteer driver taking a senior to a medical appointment, a family visiting a local festival, or a group of teens heading to a community center, each trip tells a story of connection and care. These everyday moments reflect the power of shared rides in building stronger, socially rich, and more inclusive communities.

Looking ahead, Community Van remains a vital part of King County's vision for equitable, accessible, and sustainable transportation, delivered not just through vehicles but through people.

Additional Resources from the King County Metro Community Van Program and Community Van-Hopelink

- King County Metro Community Van Information – King County Website with links to promotional video, Community Transportation Coordinators contacts, FAQs, and the Volunteer Driver Toolkit.

- HopeLink Community Van Program

- Volunteer Driver Application & Agreement Form

- HopeLink Community Van – Rider Expectations and Policies (includes expectations for youth riders)

- King County Metro's Community Van webpage includes a Driver Toolkit section that includes the following components:

  - King County Metro Community Van – Community Van Volunteer Driver Selection Criteria

  - King County Metro Community Van - Driver Application and Agreement

  - King County Metro Community Van Program - Program Participant Manual: For Community Transportation Coordinators and Volunteer Drivers

  - King County Metro Transit Division - Community Van Driver Orientation

  - King County Metro Transit Division – Disability Awareness

  - King County Metro Community Van – Van Accessible Equipment Operations Tips Sheet

- Community Van Child Rider Consent Forms and videos from Braun Ramp and In-Van Wheelchair Securement System (Q-Straint) are also available on the webpage.

- King County Mobility Coalition, The Need for Medical Chaperones for Post-Sedation Transportation, March 2025

New Freedom/Compass IL, Transportation Program, Menomonie, Wisconsin

Compass IL New Freedom Transportation Program

About New Freedom/Compass IL

The New Freedom Transportation Program got its start in 2003 when Compass IL (formerly known as the Center for Independent Living of Western Wisconsin) collaborated with a local advocacy group to secure a grant through United Way of St. Croix County. Initially, the program operated as a traditional voucher system, but it soon became evident that many individuals faced challenges in securing rides through this method. To address this issue, the program partnered with the Hugh J. Andersen Foundation, which provided a $12,000 grant to support transportation services.

Serving ten counties in western Wisconsin, New Freedom/Compass IL transitioned into a volunteer driver model. Over the years, the program has received additional funding from various foundations, enabling it to apply for FTA Section 5310 Enhanced Mobility of Seniors and Individuals with Disabilities grant funding. This financial support allowed the program to contract with additional counties and agencies, particularly within the last five to ten years.

In Wisconsin, counties receive Specialized Transportation Assistance Program for Counties (Wis. Stat. 85.21) funding for transportation for older adults and persons with disabilities. New Freedom/Compass IL contracts with counties to provide transportation for rural residents, the Wisconsin Department of Health Services' IRIS (Include, Respect, I Self-Direct) program, a self-directed Medicaid long term care initiative for older adults and adults with disabilities, and Managed Care Organizations (Medicaid). New Freedom/Compass IL also works with the State Department of Vocational Rehabilitation and veterans' service organizations. Unlike many transportation services, the program does not aim to replace existing county efforts but rather to fill transportation gaps.

Approximately three years ago, the program expanded by partnering with three more independent living centers, extending its reach northward, central Wisconsin, and the La Crosse region down to the Illinois border.

New Freedom/Compass IL provides transportation services to persons with disabilities and older adults. New Freedom currently covers 42 counties in Western Wisconsin and requires coordination across numerous agencies and organizations in the region.

Photo credit: New Freedom/Compass IL

Compass IL Mission Statement - "To provide services and opportunities for persons with disabilities to exercise their right to full participation in the community." Compass IL website

Program Structure

Compass IL oversees three primary programs: an independent living program, a caregiver support initiative, and New Freedom Transportation. Compass IL functions as the host or supporting organization for the New Freedom volunteer driver program.

The organization employs four dispatchers, all of whom are cross trained in dispatch operations. Additionally, they employ a billing clerk and a coordinator. A licensed staff member ensures compliance with record-keeping requirements. An additional dispatcher is expected to be hired in 2025.

The program has two wheelchair-accessible vehicles (WAVs) but volunteers usually drive their own vehicles.

Note: Recent hospital closures have increased the need for long-distance medical transportation, particularly for dialysis patients.

Rider Eligibility

Eligible riders must have a temporary or permanent disability, be a veteran, or be an older adult, and have a transportation barrier. Currently, 600 unique riders regularly utilize the service.

Services, Service Area, and Scheduling

New Freedom/Compass IL provides transportation services in 42 counties; the program maintains a significant presence in only some of these areas:

- Primary Counties Served - Barron, Chippewa, Clark, Dunn, Eau Claire, Pepin, Pierce, Polk, Rusk, St. Croix

- Other Counties Served - Adams, Ashland, Bayfield, Buffalo, Burnett, Crawford, Douglas, Florence, Forest, Grant, Iowa, Iron, Jackson, Juneau, La Crosse, Lafayette, Langlade, Lincoln, Marathon, Monroe, Oneida, Portage, Price, Richland, Sauk, Sawyer, Taylor, Trempealeau, Vernon, Vilas, Washburn, Wood.

Prospective riders are asked to call New Freedom/Compass IL Transportation offices directly for information, referral, and transportation options.

While the offices are open Monday – Friday, 8 to 4:30 PM, the New Freedom/Compass IL drivers are available 24/7, which distinguishes it from most other programs.

In addition to rides, New Freedom/Compass IL helps potential riders with information and referrals for other transportation options. One strategic goal is to expand services in underserved counties, contingent upon securing increased [FTA Section 5310 Enhanced Mobility of Seniors and Individuals with Disabilities](#) funding.

Funding

As the supporting organization for the New Freedom/Compass IL volunteer driver program, Compass IL receives state and federal funding while contracting with counties for state funds.

New Freedom/Compass IL's funding streams include:

- [FTA Section 5310 Enhanced Mobility of Seniors and Individuals with Disabilities](#) grants

- Contracted rides through Managed Care Organizations (Medicaid) and counties

- Direct fee-for-service rides for individuals

- Grants from the Louis Peck Foundation for medical volunteer rides

- Local United Way contributions

Volunteer Drivers

New Freedom/Compass IL initially launched with 20 volunteer drivers and later expanded to 40. With the introduction of [FTA Section 5310 Enhanced Mobility of Seniors and Individuals with Disabilities](#) funding in 2007, the volunteer driver program grew significantly. Currently, the program operates with approximately 90 active drivers. A common scenario involves a volunteer driver transporting an individual to a dialysis appointment and remaining on-site until the appointment concludes. Due to recent hospital closures, drivers often face extended wait times. Some volunteer drivers are seasonal, temporarily relocating to Florida during certain months of the year.

Volunteer Driver Requirements include:

- Valid driver's license

- Good driving record

- Proof of liability insurance

- A clean background check

[New Freedom](#)/[Compass IL's Volunteer Driver Application and Agreement](#), which includes State of Wisconsin Background Check Information and Release forms are available online.

Driver Recruitment and Incentives

Volunteer recruitment has been particularly challenging since the COVID-19 pandemic. Rising gas prices and increased living costs have led some retirees to return to work, reducing the number of available drivers. National trends indicate a 30 percent decline in volunteerism. A significant portion of volunteers are retired older adults, with many veterans driving fellow veterans.

Note: Prior to the COVID-19 pandemic, the program maintained around 150 volunteers, but the pandemic caused a decline.

New Freedom/Compass IL Incentives for Drivers:

- Annual regional driver training sessions, including instructional workshops, catered meals, and prize giveaways.

- Upon finalizing a contract with New Freedom/Compass IL, volunteers are covered under Compass IL's umbrella insurance and receive additional benefits such as appreciation luncheons and training.

- Whenever possible, the program provides small gifts or gift cards as tokens of appreciation. Previously, they distributed QuikTrip gas cards, which were well received.

- Monthly newsletters keep volunteers informed and engaged.

Driver Training

The program provides wheelchair securement training for drivers operating vehicles WAVs. Additionally, they implement a "Train the Trainer" model, in which two certified drivers facilitate securement training through the [Wisconsin Rural Transit Assistance Program (RTAP)](#). The program covers travel and meal costs for training participants.

Drivers also receive crisis intervention training to handle situations requiring enhanced safety measures. For example, they transport individuals to secure locations, facilitate access to medication, and follow strict safety protocols, such as ensuring direct drop-offs and avoiding unnecessary stops.

Conclusion

The New Freedom Volunteer Driver Program receives strong support from its supporting organization, Compass IL. The program has been able to grow and expand by partnering with independent living centers and through its commitment to seeking out additional funding sources.

Additional Resources from Compass IL, New Freedom

- [Compass IL New Freedom's Volunteer Driver Application and Agreement](#), including State of Wisconsin Background Check Information and Release forms

- [Specialized Transportation Assistance Program for Counties (Wis. Stat. 85.21)](#)

- [Volunteer Drivers Needed to Transport Elderly, Disabled Folks in Rural Areas](#) – Local television news coverage WQOW, August 23, 2022

- [Wisconsin Rural Transit Assistance Program (RTAP)](#)

Part Two - Common Themes

Several common themes were revealed in the interviews with the representatives of the volunteer driver programs included in *Part One - Individual Cases Studies* of this section. Those themes include:

- Driver Incentives

- Training Strategies

- Risk Management Strategies

- Software Considerations

- Medical Considerations

Driver Incentives

The volunteer driver programs included in *Part One - Individual Cases Studies* reflect a mix of basic motivations (drivers say they get something out of simply helping others) and other incentives (reimbursement, recognition, and gifts) across the programs.
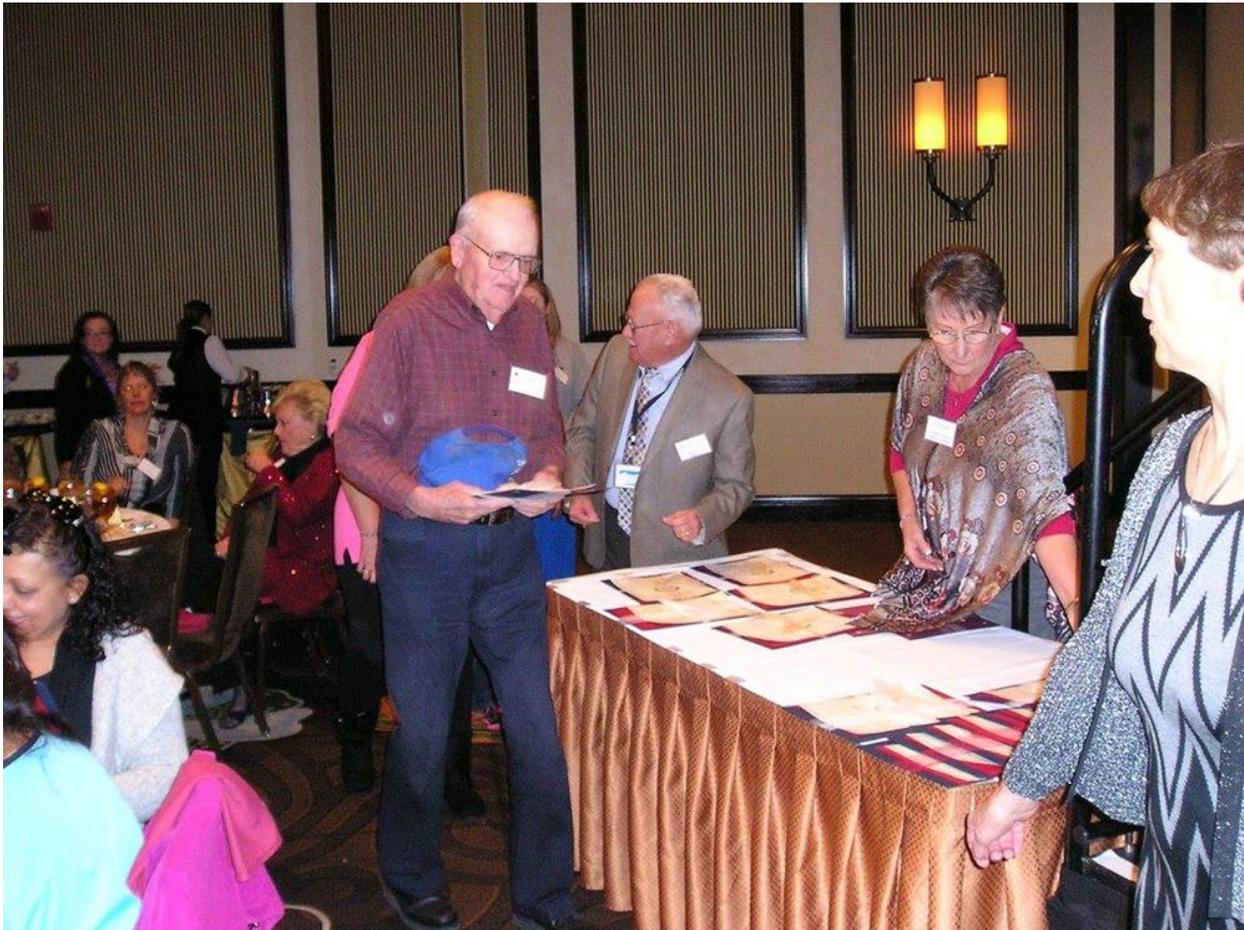
Photo credit: Nevada RSVP – Nevada RSVP Caregiver Volunteer Recognition Banquet.

Key Findings About Driver Incentives - Across Programs

Mileage Reimbursement: Several programs (**Ride Connection, SAINT**, and **WexExpress New Freedom**) offer mileage reimbursement to incentivize volunteer driving, with varying rates and conditions.

Recognition Events: Most programs host events to appreciate volunteers, typically annually, often during holidays or specific "Volunteer Appreciation" months. Common incentives include meals, awards, and raffle prizes.

Gifts and Tokens of Appreciation: Programs like **New Freedom/Compass IL**, **Nevada RSVP**, and **WexExpress New Freedom** provide occasional gifts such as gas cards, gift baskets, or practical items for the car to show appreciation.

Volunteer Motivation: Many volunteers are primarily driven by the desire to give back to their communities, with intrinsic satisfaction being a key motivating factor. However, recognition events and small rewards enhance their sense of being valued.

Insurance and Certification: Some programs (**Ride Connection** and **WexExpress New Freedom**) offer additional benefits, like insurance discounts through defensive driving or vehicle certification for safety, adding a layer of support for drivers.

Autonomy vs. Interaction: Some programs (**Space Coast/Volunteers in Motion**) emphasize the autonomy of volunteers, while others (**SAINT**) create opportunities for social interaction and community-building through regular appreciation events.

Training Strategies

While their approaches to training may differ, all the volunteer driver programs included in this section of the Toolkit have a shared understanding of the necessity and value of training volunteer drivers. All require that drivers attend orientation and some form of training prior to transporting clients. Most have structured training programs that include road testing with training staff and wheelchair securement training for drivers of accessible vehicles.

Paratransit Standards: Space Coast Area Transit/Volunteers in Motion follows a structured training built on based on ADA complementary paratransit service standards. Volunteers receive Passenger Assistance Safety and Sensitivity (PASS) training at Space Coast Area Transit, supplemented by on-the-job training using a comprehensive 16-page checklist. **WexExpress New Freedom** also provides Passenger Assistance Safety and Sensitivity (PASS) training. **King County Metro Community Van** provides Accessible Equipment & Disability Awareness Training (AEDA) Training, including AEDA Wheelchair Securement Training. All **Nevada RSVP** volunteers receive paratransit certification, although it is not a mandatory requirement.

Hands-on Training: **Space Coast Area Transit/Volunteers in Motion** uses a hands-on approach that allows program coordinators to assess volunteers' capabilities and assign them to appropriate clients based on their comfort level and experience. **WexExpress New Freedom's Mobility Coordination Office** staff provide hands-on training, including wheelchair securement procedures. If a driver has difficulty with securement, the office's mobility coordinator provides additional on-the-road training.

Training Sessions: New Freedom/Compass IL has annual regional driver training sessions that include instructional workshops, catered meals, and prize giveaways.

Training through Supporting Organizations: Several programs are able to provide training to volunteers through their supporting organization. **Volunteers in Motion** volunteer drivers receive training through **Space Coast Area Transit**. **Community Van** volunteer drivers receive training through **King County Metro** resources. Refresher courses in wheelchair securement are also provided to ensure drivers remain up to date on best practices. Training for **WexExpress New Freedom** volunteers is supported by Cadillac/Wexford Transit Authority's (CWTA) WexExpress Mobility Coordination Office.

"Train the Trainer" Models: **New Freedom/Compass IL** uses a "Train the Trainer" model, in which two certified drivers facilitate securement training through the Wisconsin Rural Transit Assistance Program (RTAP). The program covers travel and meal costs for training participants.

Risk Management Strategies

The risk management strategies that follow, especially the use of insurance, background checks, and clear communication, reflect a common approach to managing risk across the volunteer transportation programs included in this Toolkit.

Insurance Coverage

Some programs rely on volunteers to maintain their own insurance but do not have a formal risk management strategy in place for insurance coverage.

New Freedom/Compass IL, **Nevada RSVP**, and **SAINT** have umbrella auto insurance that covers volunteers in the event of an accident. **Nevada RSVP** specifically ensures that volunteers' own personal insurance is the primary coverage, with their umbrella insurance filling in as needed.

Background Checks

SAINT, **Nevada RSVP**, and **Ride Connection** emphasize the importance of background checks.

SAINT conducts both criminal and motor vehicle background checks for their drivers. **RSVP** requires background checks for volunteers using their own vehicles. **Ride Connection** also provides regular safety and weather-related reminders to drivers.

Vehicle Maintenance

New Freedom/Compass IL, **Nevada RSVP**, and **SAINT** have ongoing checks in place for basic vehicle safety and maintenance.

Nevada RSVP also conducts Quality Assurance/Quality Control (QA/QC) checks on vehicles to ensure they're clean, maintained, and have functional air conditioning. **SAINT** also has policies in place to address any complaints or issues with vehicle conditions.

Handling Complaints and Issues

Both **SAINT** and **Nevada RSVP** have structured processes to handle complaints and resolve issues between drivers and riders.

SAINT has an escalation process and handles issues through written statements if necessary. **Nevada RSVP** also has clear protocols for following up on complaints and ensuring quality service.

Ride Connection checks in with drivers for safety-related concerns.

Ride Scheduling and Cancellations

SAINT has implemented specific policies to address cancellations, including suspending rides if cancellation rates exceed certain thresholds. Their new, clearer policies have made it easier to enforce, reducing cancellations and no-shows.

Risk Mitigation Through Training & Communication

New Freedom/**Compass IL** offers regional training, and **Ride Connection** provides seasonal updates to drivers, particularly weather-related safety reminders. These training and communication efforts help to mitigate risks related to driver safety and weather conditions.

SAINT emphasizes clear communication through handbooks for both drivers and riders, setting expectations and reducing risk through well-defined processes.

Key Shared Risk Management Strategies:

Insurance Coverage: Most programs have umbrella insurance that covers volunteers, with some requiring personal insurance for volunteers as the primary coverage.

Background Checks: Criminal and motor vehicle background checks are standard for most programs, ensuring that drivers meet safety and reliability standards.

Vehicle Maintenance: Several programs, including **Nevada RSVP** and **SAINT**, ensure that vehicles are checked for cleanliness, maintenance, and safety, either through voluntary checks or scheduled QA/QC processes.

Complaint Resolution: Programs like **SAINT** and **Nevada RSVP** have structured processes in place to handle complaints between drivers and riders, which can help reduce miscommunication and prevent further conflicts.

Ride Policies: **SAINT** has implemented clear ride policies to address cancellations and no-shows, demonstrating an effective strategy for managing scheduling risks.

Software Considerations

The software considerations that follow point to a shared need across volunteer driver programs for more effective, user-friendly software solutions tailored to their specific needs. There is an opportunity to improve software solutions to address the specific needs of volunteer driver programs, such as better route planning, client history tracking, and driver communication tools. There are also opportunities for improving data management, communication, and operational automation to further enhance service delivery.

Software Functionality and Challenges

Some programs have experienced challenges with the functionality of their current software.

Source: Space Coast Transit/Volunteers in Motion

SAINT uses ride scheduling software, which allows them to maintain driver notes for specific instructions (e.g., "this driver cannot take dogs"). They emphasize the importance of consistently reviewing expectations and regularly reminding drivers to update the office about changes. Their approach to software is simple and focused on smooth operational continuity.

Software for Managing Operations

Some programs use software to track client stops, providing a basic level of functionality that helps with appointment scheduling.

The use of ride scheduling software helps **SAINT** streamline their operations by maintaining important driver-specific notes, which is particularly helpful for managing special requirements or restrictions (like not transporting pets). Their software also facilitates communication with drivers to ensure smooth scheduling.

Key Shared Software Considerations:

Need for Reliable and Tailored Software: Several programs mentioned issues related to the functionality of their software, or expressed frustrations about software failing to meet expectations. Consistent communication is needed to maintain efficiency. This highlights the need for volunteer transportation programs to find reliable, tailored software solutions that align with their specific needs.

Client and Driver Data Management: Software is used to track important data, like clients' past appointments or special instructions for drivers (**SAINT**). This data management is essential for providing personalized service and ensuring that drivers have the necessary information to meet rider needs.

Communication and Consistency: The importance of keeping expectations clear and regularly reminding drivers to communicate any changes is emphasized in **SAINT**'s program. This consistency in communication appears to be vital to keeping operations smooth, particularly in programs with a large volunteer base.

Gaps and Opportunities:

Integration and Customization: One of the programs interviewed is still searching for a more effective software solution, which suggests there may be opportunities for developing or integrating better systems that are specifically designed for volunteer transportation programs.

Automation and Efficiency: Two of the programs interviewed thought that they would both benefit from software that can automate more processes, like reminders for drivers and clients, and automatically track or update information related to appointments, cancellations, or scheduling conflicts. This would reduce the manual workload and improve operational efficiency.

Medical Considerations

Whether through training, enhanced client support, or more specialized programs like medical chaperones, the medical considerations that follow show that volunteer transportation programs are increasingly aware of the medical challenges their clients face and are adapting to meet these needs.

Service Area and Scope

New Freedom/Compass IL operates its van ride service within an eight-county service area. The program relies on federal grants to expand services to more remote, northern counties with mobility

needs. Additionally, the program has United Way funding to cover medical rides for older adults not covered by other contracts.

Client Safety and Assistance

To ensure preparedness for medical emergencies, Drive a Senior has clear policies and procedures in place for its door-to-door, door-thru-door, and curb-to curb services. Curb-to-Curb service is for clients who are still very independent and need minimal assistance. Door-to-Door service requires the volunteer to accompany the client to and from their door and Door-thru-Door service is for high-need clients that may require assistance entering and inside their destination. Volunteers are instructed on how to perform each type of service and properly care for the needs of individual clients. If the client is in an emergency, volunteers must first contact emergency services. They should then contact the program for additional assistance, as appropriate.

Medical Chaperone Program

King County Metro Community Van considered a medical chaperone program that would provide volunteers to accompany isolated older adults to and from medical appointments involving sedation when a "responsible party" is required post-procedure for patient safety. In 2025, King County's Mobility Management team began to lay the groundwork for piloting a medical chaperone project. While the project was put on hold due to capacity constraints, the information gathered in the process is available at [King County Mobility Coalition, The Need for Medical Chaperones for Post-Sedation Transportation, March 2025](#).

Key Shared Medical Considerations:

Focus on Client Safety: Most programs emphasize ensuring the safety and well-being of clients, particularly in situations where medical emergencies (such as falls) could occur. **Drive a Senior**, for example, has policies in place for dealing with these types of incidents.

Training for Drivers: **Drive a Senior** stands out with its focus on training drivers to identify early warning signs of neurological disorders and mental health issues, such as depression and anxiety. This shows a growing recognition of the need for volunteer drivers to be equipped to respond to mental and neurological health concerns.

Support for Medical Appointments: **King County Metro Community Van's** potential medical chaperone program (see above) highlights an effort to provide extra support for clients attending medical appointments, which could be particularly beneficial for clients who need assistance with complex medical needs or post-surgery care.

Gaps and Opportunities:

Training for Medical Issues: One of the programs interviewed is actively looking into training for drivers to identify early warning signs of neurological and mental health disorders, other programs could benefit from similar training. Programs could consider offering general first aid, cardiopulmonary resuscitation (CPR), and specific mental health awareness training for drivers to better support clients during transportation.

Comprehensive Medical Assistance: A program like **King County Metro Community Van's** "medical chaperone" initiative could be an interesting model for other programs to adopt, especially for clients with more complex medical needs or those undergoing medical procedures that require a higher level of support during transit.

Part Three - Lessons Learned

Interviewees from all eight volunteer driver programs shared "lessons learned" from decades of experience managing their programs. Their insights are combined and organized using the key themes listed below.

Photo credit: Drive a Senior/Chariot – Volunteer Recognition, Texas

- **Volunteer Engagement and Retention**: Programs stress the importance of recruiting the right volunteers and maintaining their commitment through communication, recognition, and matching them with appropriate roles.

- **Day-to-day Operational Efficiency**: Clear expectations, effective communication, and leveraging technology (though sometimes imperfect) are central to smooth day-to-day operations.

- **Flexibility and Adaptability**: Programs need to be flexible in their service offerings, adjusting to client needs and expanding the scope of services when possible.

- **Funding and Sustainability**: Securing grants and funding through innovative solutions is crucial for maintaining and growing the program. Read more about Local, State, and Federal Funding in *Section 2 – Volunteer Driver Programs*.

- **Safety and Liability Management**: Ensuring clear boundaries for volunteers and managing liability concerns are crucial for maintaining a safe and legally compliant operation.

These lessons learned provide a roadmap for improving volunteer transportation programs, emphasizing the need for strong communication, reliable technology, volunteer appreciation, and flexibility in service offerings. The following section uses specific examples to capture and further breakdown the key themes discussed above.

Volunteer Recruitment and Retention

Effective recruitment and retention of volunteers is essential for the success of the programs.

New Freedom/**Compass IL** uses a variety of methods for recruitment, such as newsletters, radio ads, and word of mouth, with a particular emphasis on drivers connecting with each other (e.g., veterans recruiting other veterans).

King County Metro Community Van implements one-on-one meetings with volunteers and uses a volunteer interest form to understand preferences and better match drivers to clients.

Consistency in communication with **SAINT's** volunteers is key to maintaining their engagement. **WexExpress New Freedom** volunteers appreciate the reimbursement rate. Clear distinctions between volunteer vehicles and paid services help manage expectations.

Communication with Volunteers and Riders

Clear and frequent communication is critical for smooth day-to-day operations.

Ongoing communication with both drivers and riders, regular reminders, and clear expectations are key to keeping services on track for **SAINT**, a highly autonomous volunteer model.

To foster a sense of community, **Ride Connection** places a strong emphasis on building volunteer connections and providing recognition through newsletters and ambassadorship programs.

Space Coast Transit/Volunteers in Motion recognizes the importance of clear communication but acknowledges that volunteer recognition has declined post-COVID 19 pandemic. They are looking for new ways to appreciate volunteers and maintain engagement.

King County Metro Community Van volunteers appreciate community-building opportunities, like meeting others and connecting with the program.

Program Sustainability and Funding

Securing consistent funding is often a challenge, and programs must be proactive in identifying and applying for grants.

New Freedom/**Compass IL** emphasizes the importance of securing grants and philanthropic funding to fill the funding gaps when many people can't afford transportation.

WexExpress New Freedom notes that the WexExpress Rides to Wellness (Non-Emergency Medical Transportation) program helps offload trips from WexExpress New Freedom volunteers and generates funds for the program, ensuring that volunteers are not overwhelmed by low-value, on-demand trips.

King County Metro Community Van points to the lack of current, reliable resources at the national level for volunteer transportation programs, underscoring the need for better support structures.

Volunteer Drivers - Clarity and Expectations

Clear guidelines and expectations for volunteer drivers are necessary to ensure smooth operations and maintain high-quality service.

Volunteers with **Nevada RSVP** are reminded that even though they must adhere to a hands-on, companion-based approach to assisting clients they should always be treated professionally.

According to SAINT, driver notes (e.g., "this driver cannot take dogs") are essential to make sure volunteers are equipped to handle specific requirements for each ride.

WexExpress New Freedom clarifies the boundaries of what volunteers can and cannot do, especially regarding liability and not being a "responsible party" for medical appointments or surgeries.

Technology and Software Utilization

The use of technology, including software systems for dispatching and ride coordination, plays a central role but can be challenging to implement effectively.

Nevada RSVP noted the need for more effective, tailored software solutions for volunteer transportation coordination.

Drive a Senior benefits from a user-friendly software system/platform that helps manage ride coordination and capture important data (e.g., mileage and trip frequency), supporting a more data-driven approach. In addition, updates to the platform have given volunteers more control. Volunteers can choose rides based on distance from themselves, they can see a client's service needs so that they can make an informed decision when volunteering for a ride or service. Volunteers can also update their availability and add unavailable dates if they are going to be out of town or unavailable for an extended period of time. Drive a Senior's Director of Volunteer Services reports receiving great feedback from their volunteers. They enjoy the system's ease of use and the flexibility to volunteer at times that they choose.

SAINT uses a software system for driver-specific notes and updates, helping them keep track of driver requirements and ensuring efficient communication.

Liability and Safety Concerns

Volunteer transportation programs must navigate safety concerns, particularly with regard to liability, medical appointments, and safe driving practices.

King County Metro Community Van: Volunteers are covered by the agency's liability, ensuring they are protected while transporting clients, a distinction that makes the program stand out as a "transit agency" volunteer program.

WexExpress New Freedom: Addresses liability by not allowing volunteers to act as "responsible parties" during medical appointments or surgeries, protecting both volunteers and the program.

Volunteer Appreciation and Recognition

Volunteer recognition plays a vital role in maintaining morale and ensuring long-term program success.

Space Coast Transit/Volunteers in Motion acknowledges that volunteer recognition has decreased post-COVID but is actively seeking new ways to show appreciation beyond the traditional methods.

Volunteers with **WexExpress New Freedom** appreciate small tokens like fuel-efficient car reimbursements. The WexExpress Rides to Wellness service for older adults also helps to relieve pressure on volunteers.

King County Metro Community Van volunteers enjoy opportunities for face-to-face meetings and a sense of community, which foster a deeper connection to the program.

Service Scope and Flexibility

Expanding the scope of services and being flexible in meeting the unique needs of clients can lead to more impactful programs.

Space Coast Transit/Volunteers in Motion wishes to expand services beyond life-sustaining trips (e.g., medical and grocery shopping) to include social outings and other non-essential trips.

Drive a Senior focuses on flexibility with service hours and allows caregivers to accompany clients on medical trips, ensuring a broader range of service. **Drive a Senior** also offers "Community Rides" for groups wishing to go somewhere together.

WexExpress New Freedom has been able to meet the transportation needs of clients more effectively by implementing a fee-for-service option with its Rides to Wellness (Non-Emergency Medical Transportation) program. This has decreased the number of trips required of **WexExpress New Freedom** volunteers.

Section Resources

Chariot, Austin, Texas

> Age of Change: Austin's Transforming Demographics 2010-2020, City of Austin Planning Department
>
> Chariot, *we're driving you're thriving* Strategic Plan 2025 - 2028
>
> Chariot, *we're driving you're thriving* 2023 Annual Report
>
> Chariot Financial Reports 2020 - 2023
>
> Chariot's 2025 Volunteer Driver Recruitment

Drive a Senior, Austin, Texas

> Austin-Area Nonprofit Organizations Providing Senior Transportation

Drive a Senior ATX, Austin, Texas

FTA Circular C9070.1H - Enhanced Mobility of Seniors and Individuals with Disabilities Program

FTA Section 5310 Enhanced Mobility of Seniors and Individuals with Disabilities (previously known as a New Freedom grant)

FTA Section 5311 Formula Grants for Rural Areas

King County Metro Community Van, Seattle, Washington

> HopeLink Community Van Program
>
> HopeLink Community Van – Rider Expectations and Policies (includes expectations for youth riders)
>
> King County Metro Community Van Information – King County Website with links to promotional video, Community Transportation Coordinators contacts, FAQs, and the Volunteer Driver Toolkit.
>
> King County Metro's Community Van webpage includes a Driver Toolkit section that includes the following components:

King County Metro Community Van – Community Van Volunteer Driver Selection Criteria

King County Metro Community Van - Driver Application and Agreement

King County Metro Community Van Program - Program Participant Manual: For Community Transportation Coordinators and Volunteer Drivers

King County Metro Transit Division - Community Van Driver Orientation

King County Metro Transit Division – Disability Awareness

King County Metro Community Van – Van Accessible Equipment Operations Tips Sheet

Community Van Child Rider Consent Forms and videos from Braun Ramp and In-Van Wheelchair Securement System (Q-Straint) are also available on the webpage.

Volunteer Driver Application & Agreement Form

King County Mobility Coalition, The Need for Medical Chaperones for Post-Sedation Transportation, March 2025

Regional Alliance for Resilient and Equitable Transportation (RARET)

Sydnor D. RARET's coalition-based model: Addressing complex life-sustaining transportation during emergencies. J Bus Contin Emer Plan. 2024 Jan 1;17(3):248-260. PMID: 38424587.

Nevada Rural Counties Retired and Senior Volunteer Program (Nevada RSVP), Carson City, Nevada

Nevada Care Connection's Adult Protective Services Training and Quiz

Nevada RSVP Volunteer Forms

RSVP Volunteer Application (includes the RSVP Code of Ethics)

Veterans Volunteers in Partnership (Veterans VIP) Program - Nevada Rural Counties RSVP Program Inc. expanded its services to include a dedicated Veteran's program.

New Freedom/Compass IL Transportation Program, Menomonie, Wisconsin

Compass IL New Freedom's Volunteer Driver Application and Agreement, including State of Wisconsin Background Check Information and Release forms is available on line.

Specialized Transportation Assistance Program for Counties (Wis. Stat. 85.21)

Volunteer Drivers Needed to Transport Elderly, Disabled Folks in Rural Areas – Local television news coverage WQOW, August 23, 2022

Wisconsin Rural Transit Assistance Program (RTAP)

Older Americans ACT (OAA) Title IIIB: Grants for State and Community Programs on Aging

Ride Connection, Portland, Oregon

Ride Connection Rider Service Guide

Ride Connection's Operation Manual is available online.

Ride Connection's Annual Reports for 2012 thru 2023 are also available online.

Rural Washington Door to Door Service Fact Sheet

Senior Access, Austin, Texas

Senior Alternatives in Transportation (SAINT), Fort Collins, Colorado

SAINT Annual Reports 2019 - 2024

SAINT Audited Financials 2020 – 2022

Space Coast Area Transit/Volunteers in Motion, Cocoa, Florida

Space Coast Area Transit: Rider's Guide for Special Services - A Public Transportation Rider's Guide for Eligible Seniors and Transportation Disadvantaged, Including Origin to Destination TD Paratransit Service and ADA Paratransit Service
Space Coast Area Transit, FY 2023 – 2032 Transit Development Plan

WexExpress New Freedom Volunteer Driver Program, Cadillac, Michigan

NADTC Case Study: Small Town, Big Impact; WexExpress: Who We Are Presentation

New Freedom Volunteer Driver Program and WexExpress Mobility Coordination Office.

Appendix to Section 7 - Case Studies and Methodologies

This appendix to *Section 7 – Case Studies and Methodologies* contains a selection of resources that has been especially compiled for individuals and organizations wishing to learn more about a variety of volunteer driver program related topics. The volunteer driver programs highlighted in Section 7 generously provided a many resources that will be useful to both new and seasoned volunteer driver programs. Those resources are included here along with other resources that will also be of value to programs looking for examples of materials and ideas that have worked well for other organizations. Whenever possible, links are provided to online access.

Resources have been arranged in the following categories:

- Recruitment Materials
- Handbooks and Guides for Volunteers
- Handbooks and Guides for Riders
- Insurance Resources
- Organizational Policy and Procedure Resources (Confidentiality, HIPPA, first aid, etc.)
- Transportation Plans and Trip Logs
- Training materials

Recruitment Materials

The handbooks, guidebooks, fliers, and other materials included here are meant to provide guidance by sharing the recruitment techniques and processes used by the volunteer driver programs that participated in the case studies. (*Section 7 – Case Studies and Methodologies*).

Section 2 - Volunteer Driver Programs/The Importance of Community Relations offers guidance on the ongoing work and importance of taking an organized approach to promoting volunteer transportation programs and recruiting volunteer drivers.

Included below:

Volunteer Driver Recruitment Flier, Hopelink Community Van

Volunteer Transportation Recruitment Toolkit, King County Mobility Coalition (KCMC)/Eastside Easy Rider Collaborative, published April 2021

Volunteer Driver Recruitment Flier, Hopelink Community Van

BECOME A

COMMUNITY VAN
VOLUNTEER DRIVER!

About Us

Use our Community Van to volunteer and help your community! Volunteer to help people in your community who have unreliable access to transportation, disabilities, or are low-income.

Save wear and tear on your vehicle by using ours! We provide the vehicle, gas, maintenance, insurance, and tolls!

For more information

425-943-6721

communityvan@hopelink.org

kingcounty.gov/communityvan

Potential trips:

- Senior grocery trips
- Social services appointments
- Airport trips
- Student field trips
- and more essential and recreational trips!

Becoming a driver is easy!

- Submit virtual application
- 30 min in-person training in your city
- 30 min self-led online orientation.

Drivers must be at least 21 years of age with at least 5 years of driving history and current, unrestricted Washington State drivers license.

Volunteer Transportation Recruitment Toolkit, King County Mobility Coalition (KCMC)/Eastside Easy Rider Collaborative, published April 2021 (7 pages)

VOLUNTEER TRANSPORTATION RECRUITMENT TOOLKIT

BACKGROUND

Eastside Easy Rider Collaborative (EERC), in partnership with King County Mobility Coalition (KCMC) and volunteer transportation programs in King County, launched two guides to best serve volunteer drivers and riders. The Rider Guide and Driver Guide were created to meet the need for greater volunteer driver recruitment and retention.

SOCIAL MEDIA & DIGITAL MEDIA RESOURCES

This toolkit has been designed to be flexible to your communication needs. Social media graphics are provided for Facebook, Twitter, and Instagram; individual graphics are provided for each service, as well an option for promoting both services. Suggested post copy and alternate text is provided. Hashtags included are used to reach our intended audience with relevant and area specific trends in mind. To view and save the graphic, please click on the image to view it in full size.

PHYSICAL COLLATERAL & IN-PERSON OUTREACH

We also encourage physical collateral and one-on-one outreach with community members to reach diverse populations. Printable flyers are provided; these copies utilize a hybrid of physical contact information and a QR code for easier connectivity (if the interested party has access to a smart phone camera).

Please be aware that Hopelink Mobility staff will connect interested volunteers to transportation programs for a short period of time and this service will be available until July 2021. At that time, our involvement will end, and stakeholders will be contacted to discuss the project's successes and long-term plans.

Published: April 2021

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DRIVER RECRUITMENT

	Copy	Image	Alt Text
Twitter	Looking for a way to give back to the #community? Become a #volunteer driver and provide #rides for your neighbors to access food, run essential errands, provide contactless delivery, and more. Become a community #hero today! To get involved and learn more, fill out the **interest form:** here. #spreadthehope #causes		Flyer posted by Hopelink Mobility to recruit volunteer drivers in King County. Interested applicants to email cheatherlv@hopelink.org or call 425-625-6784. Images of partner logos are: Sound Generations, Metro Community Van, Northshore Senior Center, Catholic Community Services of Western Washington, American Cancer Society, Kaiser Permanente, Snoqualmie Valley Transportation, and Eastside Friends of Seniors.
Facebook	Are you looking for a way to give back to the community? Do you like staying busy, meeting new people, and driving to new places? Become a Volunteer Driver and make a difference one ride at a time. Volunteer transportation programs offer flexible ways for drivers to volunteer. To learn more and get involved, fill out the interest form here.		See above text.

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| Instagram | Are you looking for a way to give back to the #community? Do you like staying busy, meeting new people, and driving to new places? Become a Volunteer Driver and make a difference one ride at a time.

Volunteer transportation programs offer flexible ways for drivers to #volunteer.

To get involved and learn more, go to www.findaride.org/volunteer.

#spreadthehope #causes | **LOOKING TO MAKE AN IMPACT? BECOME A VOLUNTEER DRIVER!**
Hopelink Mobility is helping to match interested volunteer drivers with transportation programs throughout King County.

Volunteer for just a few hours a month to support your community one ride at a time with:
• Medical/vaccine appointments
• Access to food
• Essential errands
• Contactless options
• Neighborhood connections

To get matched with a program fill out the **volunteer interest form**, call **(425) 635-6784** or email **cheatherly@hopelink.org**.
For more information about the benefits of volunteering visit: findaride.org/volunteer | See above text. |

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COLLABORATIVE

GUIDE DISTRIBUTION

	Copy	Image	Alt Text
Twitter	Looking for a way to get around easily and on your own schedule? Learn more about how to access #volunteer #transportation services and become a rider today! Use volunteer driven transportation programs to get point-to-point rides to medical appointments, grocery stores, and so much more. Visit FindARide.org/volunteer to get more information and check out the Rider Guide to Volunteer Transportation in King County.		Image of driver and passenger smiling at camera from the passenger's side of the vehicle. Driver is outside of the car and passenger is seated inside the car.
Facebook	Looking for a way to get around easily and on your own schedule? Use volunteer driven transportation programs to get point-to-point rides to medical appointments, grocery stores, and so much more. Interested in learning more about how you can book future trips in King County? Check out the Rider Guide to Volunteer Transportation in King County. The Eastside Easy Rider Collaborative (EERC) and King County Mobility Coalition (KCMC) partnered with volunteer transportation programs serving regions throughout King County to make these guides possible. Go to FindARide.org/volunteer to find out more.		See above text.

Published: April 2021

Eastside Easy Rider
COLLABORATIVE

Instagram	Looking for a way to get around easily and on your own schedule? Use #volunteer driven #transportation programs to get point-to-point rides to medical appointments, grocery stores, and so much more. Interested in learning more about how you can book future trips in King County? Visit FindARide.org/volunteer to view the complete Rider Guide to Volunteer Transportation in King County. #mobilityforall		See above text.

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COLLABORATIVE

VOLUNTEER TRANSPORTATION PROGRAM RESOURCES

Volunteer Drivers Guide: A Guide to Best Practices

WSDOT, 2013

This comprehensive guide covers diverse topics related to the establishment, recruitment, and maintenance of a volunteer driver program. It shares best practices on the niche considerations volunteer driver programs must work through, like funding, training, contracting, and insurance variables amongst other things. Its intention is to help agencies navigate the complex requirements imposed by Washington state law. It contains recommendations, best practices, and sample forms.

Volunteer Transportation Resource Webpage

National Aging and Disability Transportation Center

The National Aging and Disability Transportation Center (NADTC) regularly compiles publications, toolkits, and other resources of interest related to volunteer transportation from across the country. Their resource repository serves as a good place to view case studies of other volunteer driver programs, learn about new findings or lessons, and reflect on best practices established for similar models throughout the U.S.

National Volunteer Transportation Center

Community Transportation Association of America

The Center compiles information related to volunteer transportation programs and activities by collecting technical resources, educational programs, best practices, and more. It is an updated platform that produces and assembles various useful volunteer transportation provider tools. It hosts a lengthy resources page with many different helpful resources.

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COLLABORATIVE

Published: April 2021

[Volunteer Driver Recruitment and Retention Experience and Practice](#)

National Volunteer Transportation Center, 2016

Using the advice and feedback of volunteer driver programs across the country, this handbook is informed by practical and empirical information related to volunteer driver recruitment and retention. Its content was developed from these experiences and recommendations. Following the knowledge that the key to success is recruitment and retention for volunteer driver programs, this resource advises on concepts, practices, and successful implementation of recruitment and retention strategies.

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COLLABORATIVE

Handbooks, Guides, and Forms for Volunteers

As discussed in *Section 2 - Volunteer Driver Programs/Personnel Policies* all driver performance policies and processes should be included in volunteer driver handbooks. It is critical that volunteer drivers understand the expectations of the volunteer driver program and have the resources needed to provide safe rides for clients. The resources included here are all excellent examples of volunteer (driver) handbooks and guides that include necessary information and guidance for volunteers.

Available on Program Website:

Nevada RSVP Volunteer Forms

RSVP Volunteer Application (includes the RSVP Code of Ethics)

Community Van Volunteer Driver Application & Agreement Form

King County Metro's Community Van webpage includes a Driver Toolkit section that includes the following components:

> King County Metro Community Van – Community Van Volunteer Driver Selection Criteria
>
> King County Metro Community Van - Driver Application and Agreement
>
> King County Metro Community Van Program - Program Participant Manual: For Community Transportation Coordinators and Volunteer Drivers
>
> King County Metro Transit Division - Community Van Driver Orientation
>
> King County Metro Transit Division – Disability Awareness
>
> King County Metro Community Van – Van Accessible Equipment Operations Tips Sheet

Compass IL New Freedom's Volunteer Driver Application and Agreement, including State of Wisconsin Background Check Information and Release forms

Included below:

Driver Guide to Volunteer Transportation in King County, King County Mobility Coalition (KCMC)/Eastside Easy Rider Collaborative, April 2021

Volunteer Driver Handbook, WexExpress New Freedom, December 2017, Includes Appendix:

- Appendix B Pre/Post Trip Inspection form
- Appendix C Incident Report
- Appendix D Transportation Plan Correction Form
- Appendix E Medical Transportation Refusal & Release of Liability

[Driver Guide to Volunteer Transportation in King County,](#) King County Mobility Coalition (KCMC)/Eastside Easy Rider Collaborative, April 2021 (16 pages)

DRIVER GUIDE TO VOLUNTEER TRANSPORTATION IN KING COUNTY

PUBLISH DATE: APRIL 2021

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INTRODUCTION

This volunteer driver guide is tailored to potential and existing volunteer drivers with in-depth reviews of all volunteer driver programs operating in King County. It serves as a tool to inform interested or current drivers with each volunteer driver programs' qualification standards, training practices, service regions, and so on.

Volunteer driver programs provide the essential service of flexible mobility within transportation networks. These volunteer programs serve diverse populations throughout King County with affordable, safe, and accessible mobility. Volunteer driver programs tend to offer more flexibility than other transportation services and are critical in helping to ensure all community members are able to get where they need to go.

Below are a few examples of why volunteer driver programs are so valuable in your community:

- Provide rides to critical destinations such as work, school, medical appointments, etc.
- Help clients save time and energy by making travel easy, affordable, and accessible
- Transport critical resources to clients who are unable to leave their residence
- Accommodate a variety of mobility needs including supporting passengers needing additional assistance due to limited options, physical limitations, and/or a need for one-on-one support
- Promote physical, mental, and community health
- Enjoy a strong sense of purpose from community network connections and enhance clients' lives one ride at a time
- Actively support the community on your time and provide a direct impact into the lives of others
- Socialize with community members and create long-lasting connections with recurring riders
- Enjoy program benefits ranging from a program vehicle, mileage reimbursement, added insurance, and more

Eastside Easy Rider
COLLABORATIVE

PAGE | 2

The fear felt throughout the region with the onset of COVID-19 caused a significant drop in volunteer availability and trip requests. Volunteer transportation programs were tasked with creating solutions for volunteer and rider safety while continuing to provide essential trips. Many programs met these challenges head on with creativity and determination to fit the need for enhanced safety precautions. Passenger and driver wellbeing was at the forefront of their service and policy adjustments. Find more information about program responses to ensure public health and safety in this guide.

In 2020, volunteer driver programs adjusted their services to serve public need during the pandemic and provided more than 17,253 one-way trips to riders. Volunteers have been pivotal throughout the pandemic with their support of clients in need of direct transportation and their ability in providing food, medications, and other services through contactless delivery. Without these transportation options, many King County residents would not be able to access the opportunities available to them, such as food provision programs and vaccination appointments. Volunteer drivers bring safety, health, and happiness to their communities and often gain a few friends along the way.

Please reach out to Hopelink Mobility Management's Transportation Resource Line (TRL) with questions, concerns, or additional transportation support. The line is staffed Monday through Friday from 9:00AM to 4:00PM. To reach TRL staff, please call (425) 943-6760 or email mobility@hopelink.org. Learn more about the King County Mobility Coalition (KCMC) and subregional coalitions online at kcmobility.org.

Visit us online at hopelink.org for more information about additional programs and services Hopelink Mobility Management offers.

Eastside Easy Rider
COLLABORATIVE

TABLE OF CONTENTS

Eastside Easy Rider
COLLABORATIVE

VOLUNTEER TRANSPORTATION PROGRAMS COMPARISON CHART

Volunteer Driver Program	Service Area	Training	Personal Vehicle	Personal Insurance	Reimburse	Service Hours	COVID-19 Response
American Cancer Society	King County; can cross county lines	Required	Required	Required	No	Mon – Sun Flexible	No service
Catholic Community Services (CCS)	King County	Required	Required	Required	Mileage, parking, tolls, ferries	Mon – Sun Flexible	Limited service
Eastside Friends of Seniors	Sammamish & Issaquah	Required	Required	Required	Tolls	Mon – Fri 8AM – 8PM	Full service
Kaiser Permanente Transportation Assistance	King County; can cross county lines	Required	Required	Required	Mileage, tolls, other expenses	Mon – Fri 9AM – 4PM	No service
Metro Community Van	Specified regions in King County	Required	Vehicle provided	Required	Gas, tolls	Mon – Sun Flexible	Full service
Northshore Senior Center	Specified regions in King and Snohomish County	Required	Required	Required	Mileage	Mon – Fri 8AM – 5PM	Limited service
Snoqualmie Valley Transportation Senior Ride Program	North Bend, Snoqualmie, Fall City, Preston	Required	Required	Required	Mileage	Mon – Fri 8AM – 5PM	Full service
Sound Generations Volunteer Transportation	King County	No training required	Required	Required	Mileage, tolls, parking	Mon – Fri 8AM – 5PM	Full service

AMERICAN CANCER SOCIETY

Christine Geneus-Hill
Title: Senior Program Manager
Email: Christine.GeneusHill@cancer.org
Phone: (425)-404-2244
Website: cancer.org/

Physical address: 2120 1st Avenue N.
Seattle, WA 98120

COVID-19 Response: Out of service until further notice.

Type of Vehicle: Personal Vehicle

Insurance: Must have own auto insurance; organization provides supplemental insurance.

Service Area: All of King County; however, drivers can cross county lines (typically travel to Snohomish County for Evergreen or Northwest Hospitals).

Service Hours: Monday through Sunday; based on day and time of rider's medical appointment.

Eligibility requirements for volunteer driver:

- 18 - 85 years of age
- Personal vehicle
- Valid Washington state driver's license
- Clean driving record
- Background check required
- Be available during business hours and have access to a computer to complete video trainings

How to Apply: Visit volunteer opportunities page online and fill application for Road to Recovery.

Driver training required:

- Online training on processes and the Health Insurance Portability and Accountability Act (HIPPA)
- Sign confidentiality clause
- Many clients are not English proficient speakers, and bilingual volunteers are encouraged to apply

Reimbursement: None, but drivers receive a decal and name badge—a form of identification for being a representative of the organization.

Eastside Easy Rider
COLLABORATIVE

PAGE | 6

CATHOLIC COMMUNITY SERVICES (CCS) OF WESTERN WASHINGTON

Volunteer Services
Email: vc@ccsww.org
Phone: (206) 328-5787 or (888) 649-6850
Website: ccsww.org/volunteerservices

Physical address: 100 23rd Ave S.
Seattle, WA, 98144

COVID-19 Response: Currently only providing medical transportation. To help minimize risk of exposure, program offers groceries and meal deliveries to clients in place of trips. Mandatory face covering for riders and drivers. Social distancing of at least six feet observed.

Type of Vehicle: Personal Vehicle

Insurance: Driver must have own auto insurance; organization provides supplemental insurance.

Service Area: King County; will cross county lines if a volunteer is available. CCS programs are also offered in surrounding counties such as Snohomish and Pierce.

Service Hours: Monday through Saturday, hours flexible

Eligibility requirements for volunteer driver:

- 21 years of age or older
- Personal vehicle in good working order
- Valid driver's license
- Must have auto insurance
- Clean driving record
- State and/or National Background Check
- National Sex Offender Check
- Must provide references

How to Apply: Complete online volunteer registration form.

Driver training required:

- Program orientation
- Mandatory one-on-one driver training
- Policy and procedure review
- Optional semi-annual training offered

Reimbursement: Provides mileage reimbursement as well as reimbursement for parking, tolls, and ferries.

Eastside Easy Rider
COLLABORATIVE

PAGE | 7

EASTSIDE FRIENDS OF SENIORS

Linda Woodall
Title: Executive Director
Email: lindaw@eastsidefriendsofseniors.org
Phone: (425)-369-9120
Website: eastsidefriendsofseniors.org

Eastside Friends of Seniors

Physical address: 1121 228th Avenue SE
Sammamish, WA 98075

COVID-19 Response: Provide transportation to medical appointments. Shifted from trips to grocery stores to volunteer delivery of goods requested. Beginning to resume taking riders to the store. Volunteers must disclose when they have been or plan to travel amongst crowds of people. Facial coverings required. Volunteers provided with masks, gloves, and sanitizer wipes.

Type of Vehicle: Personal Vehicle

Insurance: Driver must have own auto insurance; organization provides supplemental insurance.

Service Area: Sammamish and Issaquah; serve a 20-mile radius. Flexible ride services outside of the radius if a volunteer is available.

Service Hours: Monday through Friday, 8:00AM – 8:00PM; flexible trips are possible if volunteers are available.

Eligibility requirements for volunteer driver:

- 21 years of age or older
- Personal vehicle in good working order
- Valid driver's license
- Must have auto insurance
- Clean driving record
- Must be proficient in English
- State and/or National Background Check
- Sex Offender Check
- Must provide references

How to Apply: Fill out the sign-up form online and email completed volunteer application.

Driver training required:

- Volunteer training
- Policy and procedure review
- Vehicle safety inspection
- Intermittent optional training offered

Reimbursement: Organization reimburses for tolls.

Eastside Easy Rider
COLLABORATIVE

PAGE | 8

Kaiser Permanente Transportation Assistance

Lisa Hirohata
Title: Manager, Volunteer Programs
Email: lisa.m.hirohata@kp.org
Phone: (206)-326-2815
Website: https://healthy.kaiserpermanente.org/

KAISER PERMANENTE®

Physical address: 601 Union St., Suite 3100
Seattle, WA 98101

COVID-19 Response: Please note this program is currently out of service due to COVID and not accepting ride requests at this time.

Type of Vehicle: Personal Vehicle

Insurance: Drivers must have own auto insurance; organization provides supplemental insurance.

Service Area: King County; can cross county lines.

Service Hours: Monday through Friday, 9:00AM to 4:00PM

Eligibility requirements for volunteer driver:

- 21 years of age or older
- Personal vehicle in good working order
- Valid driver's license
- Clean driving record
- State and/or National Background Check
- Must provide references
- 5 years driving experience
- Have no conflicting medical conditions
- Require TB testing and must get a flu shot

How to Apply: Contact Kaiser Permanente Transportation Assistance program coordinator at 206-326-2815. Please note that they are not taking volunteers at this time.

Driver training required:

- Online training of transportation processes and Health Insurance Portability and Accountability Act (HIPPA)
- Driver safety is optional training

Reimbursement: Mileage reimbursement; reimbursement for tolls and parking expenses.

Eastside Easy Rider
COLLABORATIVE

METRO COMMUNITY VAN

Melissa Allan
Title: Transportation Planner
Email: communityvan@kingcounty.gov
Phone: (206)-625-4500
Website: kingcounty.gov/programs/community-van

Physical address:
201 S. Jackson Street
Seattle, WA 98104

COVID-19 Response: Facial coverings required, shields between driver and rider installed to prevent direct contact, and capacity reduced to a maximum of three people per vehicle.

Type of Vehicle: Community Van provides vans for volunteer drivers to use. Pre-scheduled shared-ride van for group trips to local destinations. Community Van is driven by Metro vetted volunteer drivers that can either be part of the group that they are transporting or be independent.

Insurance: Personal auto insurance required; however, Metro agency provides auto insurance for the vehicles used.

Service Area: Community Van is available in participating cities. Currently, Community Van is in operation in Duvall, Woodinville, Bothell, Kirkland, Kenmore, Lake Forrest Park, Shoreline, Sammamish, and Vashon Island.

Service Hours: Monday through Sunday, hours flexible; Vans are available for use in the day, evening, and weekends, depending on volunteer driver availability.

Eligibility requirements for volunteer driver:
- 21 years of age or older
- Valid Washington state driver's license
- Have no more than one non-preventable accident within the last 3 years
- 5 years driving experience
- Be in good physical health

How to Apply: Online, in person, or in the community at events. Download and complete the Community Van Driver Application (PDF) and email the completed application to communityvan@kingcounty.gov or directly to your jurisdiction's Community Transportation Coordinator (contact information listed below). Email or call 206-625-4500 with questions.

Driver training required:
- Community Van (CV) program overview
  - CV Volunteer Driver Best Driving Practices
  - CV Accessible Equipment and Disability Awareness
- Vehicle basics, Trip logs, vehicle inspection reports, and key lock box operations

Eastside Easy Rider
COLLABORATIVE

PAGE | 10

Reimbursement: Metro provides reimbursement for gas and tolls. Other expenses such as parking and ferry costs are paid by riders.

Current Community Van Jurisdictions:

BOTHELL/ WOODINVILLE COMMUNITY VAN

Kristi Dreessen
Title: Community Transportation Coordinator
Email: commvan@uw.edu
Phone: (425)-352-5129
Website: uwb.edu/facility/commuter-services/commuter-van

Testimonials:

Dennis – *"The best benefit of driving was the people I met. They were interesting, fun to be with, and unfailingly grateful for the van service. For the community, the van program makes it possible for people to do things that might otherwise be impractical or impossible: taking a group trip to a museum, having an inexpensive way to get to the airport, being able to get to a doctor's appointment. The service is especially useful to elderly and low-income persons, bridging the gap between public transportation – buses and trains – and personal automobiles."*

DUVALL COMMUNITY VAN

Victor Londono Quintero
Title: Community Transportation Coordinator
Email: communityvan@hopelink.org
Phone: (425)-943-6721
Website: hopelink.org/community-van

KIRKLAND/KENMORE COMMUNITY VAN

Armaghan Baghoori
Title: Community Transportation Coordinator
Email: abaghoori@kirkland.gov
Phone: (425)-587-3924
Website: kirklandwa.gov/Kirkland-Kenmore-Community-Van

SAMMAMISH COMMUNITY VAN

Rori Kirkpatrick
Title: Community Transportation Coordinator
Email: rkirkpatrick@sammamish.us
Phone: (425)-295-0646
Website: connect.sammamish.us/mobility-hub

SHORELINE/LAKE FOREST PARK COMMUNITY VAN

Victor Londono Quintero
Title: Community Transportation Coordinator

Eastside Easy Rider
COLLABORATIVE

PAGE | 11

Email: communityvan@hopelink.org
Phone: (425)-943-6721
Website: hopelink.org/community-van

VASHON COMMUNITY VAN
Megan Lockhart
Title: Community Transportation Coordinator
Email: vashonvan@kingcounty.gov
Phone: (206)-263-5901
Website: kingcounty.gov/vashon-community-van

Eastside Easy Rider
COLLABORATIVE

NORTHSHORE SENIOR CENTER

Kelly Hosea
Title: Program Supervisor
Email: kellyh@mynorthshore.org
Phone: (425) 286-1059
Website: northshoreseniorcenter.org

Physical address: 10201 E Riverside Drive
Bothell, WA 98011

COVID-19 Response: Provide limited rides for health and food access. Offers delivery of food items from center pantry and hot meals from community dining program. If you need prescriptions to be picked up, Northshore is also able to assist.

Type of Vehicle: Personal Vehicle

Insurance: Vehicle liability insurance policy that meets Northshore Senior Center standards.

Service Area: Runs deviated routes throughout Bothell, Kirkland, Kenmore. Serves north King County and south Snohomish County.

Service Hours: Monday through Friday, 8:00AM to 5:00PM; flexible rides are possible if volunteers are available.

Eligibility requirements for volunteer driver:

- 21 years of age or older
- Valid Washington driver's license
- Personal vehicle in good working order
- State and/or National Background Check
- Access to personal cellphone

How to Apply: Email volunteer@mynorthshore.org or call (425) 286-1032 for more information.

Driver training required:

- Passenger assistance training
- First-aid/CPR certification
- Defensive driving techniques

Reimbursement: Mileage reimbursement provided.

Eastside Easy Rider
COLLABORATIVE

PAGE | 13

SNOQUALMIE VALLEY TRANSPORTATION SENIOR RIDE PROGRAM

Amy Biggs
Title: Director, Snoqualmie Valley Transportation
Email: abiggs@svtbus.org
Phone: (425) 888-7001 Ext. 109
Website: svtbus.org

Physical address: 411 Main Avenue S
North Bend, WA 98045

COVID-19 Response: Reduced rider capacity. Facial coverings required and social distancing observed.

Type of Vehicle: Personal Vehicle

Insurance: Drivers must have own auto insurance; organization provides supplemental insurance.

Service Area: Serves North Bend, Snoqualmie, Fall City, and Preston; does not travel out of King County to pick up/drop off clients.

Service Hours: Monday through Friday, 8:00AM to 5:00PM

Eligibility requirements for volunteer driver:
- Valid driver's license
- Personal vehicle in good working order
- State and/or National Background Check
- Available to volunteer 3 - 4 hours once or twice a month

How to Apply: Call 425-888-7001

Driver training required:
- Orientation

Reimbursement: Mileage reimbursement provided. This program is operated as part of the Sound Generations Volunteer Program.

Testimonials:

Cynthia – *"It's a nice way to give back to the community."*
Teresa – *"I don't think many people realize that the program exists and that they can truly make a difference in someone's life by just helping out a couple – maybe two or three times – a month."*
David – *"I volunteered to be a driver because as I retired, I felt an obligation to give back to the community where I have lived off & on since I was born here in 1936."*

Eastside Easy Rider
COLLABORATIVE

PAGE | 14

SOUND GENERATION'S VOLUNTEER TRANSPORTATION

Suma Mondal
Title: Program Director
Email: sumam@soundgenerations.org
Phone: (206) 727-6246
Website: soundgenerations.org

Physical address: 821 2nd Avenue
Seattle, WA 98104

COVID-19 Response: Volunteer drivers in personal vehicles can't transport more than one client at a time. Facial coverings required.

Type of Vehicle: Personal Vehicle

Insurance: Volunteer drivers need own auto insurance; organization provides supplemental auto insurance.

Service Area: Serves King County; does not travel out of King County to pick up/drop off clients

Service Hours: Monday through Friday, 8:00AM to 5:00PM

Eligibility requirements for volunteer driver:
- Valid driver's license
- Personal vehicle in good working order
- Clean driving record
- Requires long-term commitment (over a year) from volunteer driver

How to Apply: Fill the online application linked here or email vts@soundgenerations.org.

Driver training required:
- Cultural competency, driver safety, and other training is optional

Reimbursement: Provide mileage reimbursement, but only if volunteer requests it. Will also provide reimbursement for tolls and parking. Program provides drivers with a volunteer driver ID to indicate they are representatives of the program.

Eastside Easy Rider
COLLABORATIVE

PAGE | 15

ADDITIONAL VOLUNTEER DRIVER PROGRAMS IN KING COUNTY

The transportation programs listed below are currently operating and serving King County, however they were not involved in providing data or information to this project.

DISABLED AMERICAN VETERANS (DAV) VOLUNTEER TRANSPORTATION:

Website: www.dav.org/veterans/i-need-a-ride
Seattle VA Medical Center: (206) 762-1010

A free shuttle service to VA medical facilities for injured and ill Veterans.

NORTH EAST SEATTLE TOGETHER (NEST):

Website: https://nestseattle.org/portal/transportation/
Phone: (206) 525-6378
Email: info@nestseattle.org
Physical Address: 8008 35th Ave NE, Seattle, WA 98115

A village that provides a support network for older residents to age in place and stay engaged in their neighborhoods. Serves the neighborhoods north of the Montlake Ship Canal, south of Northgate Way and NE 110th St, west of Lake Washington, and east of Interstate 5.

MERCER ISLAND PARK AND RECREATION SENIOR TRANSPORTATION:

Website: https://www.mercerisland.gov/parksrec
Phone: (206) 236-7321
Physical Address: 2040 84th Avenue SE, Mercer Island, WA 98040

Provides transportation on Tuesdays and Thursdays for Mercer Island seniors to and from their homes and program sites.

SEATAC COMMUNITY CENTER SENIOR PROGRAM

Website: https://www.seatacwa.gov/services/senior-program
Sound Generations Hyde Shuttles: (206) 727-6262
Physical Address: 13735 24th Avenue S., SeaTac, WA 98168

Utilizes the Hyde Shuttle. Free van service for seniors age 55 and older and people with disabilities living in SeaTac and Tukwila. Ride anywhere within the city limits.

Eastside Easy Rider
COLLABORATIVE

PAGE | 16

Volunteer Driver Handbook, WexExpress New Freedom, December 2017

New Freedom
Volunteer Driver Handbook

Do you have:
1. Volunteer guidelines
2. Dispatch and Cadillac/Wexford Transit Authority Phone numbers
3. Charged smart phone (cell phone) and charger
4. Current car registration & insurance card
5. Map (paperwork with noted addresses)
6. A First Aid Kit and Reference Binder

December 12, 2017

Revised December 12, 2017

Important Information about the Volunteer Handbook

This handbook is designed to acquaint volunteers with the company and provide some information about volunteering here. The handbook is not all inclusive, but is intended to provide volunteers with a summary of some of the company's guidelines.

Volunteer service with Cadillac/Wexford Transit Authority is at the discretion of and under control of the volunteer. No advance notice for terminating a volunteer assignment is sought, but appreciated. The language used in this handbook and any verbal statements made by management are not intended to constitute a contract with the Volunteer, either express or implied; nor are they a guarantee of volunteer activity for a specific duration. No representative of Cadillac/Wexford Transit Authority, other than the president of the Board of Directors has the authority to enter into an agreement for any specified period and such agreement must be in writing, signed by the President and the volunteer.

No handbook can anticipate every circumstance or question. After reading the handbook, volunteers who have questions should talk with the Mobility Coordinator. In addition, the need may arise to change the guidelines described in the handbook; the company, therefore, reserves the right to interpret them or to change them without prior notice.

Page 1

Mission_Statement:

"providing the highest quality of safe, accessible, & reliable public transportation services while creating new opportunities and partnerships for improved quality of life."

CORE_PURPOSE:

Cadillac/Wexford Transit Authority New Freedom Program was established to develop and operate a transportation program for seniors, persons with disabilities, and others with special transportation needs in Michigan.

CORE_VALUES:

As guiding principles for all we do, we share the following essential core values:

- Integrity in all our business dealings
- Respect for individuals
- Teamwork and positive problem-solving
- Caring for our passengers, for our community and for each other

Qualifications:

- A valid driver's license for five (5) consecutive years
- No moving violations in the past two (2) years
- The ability to pass a background screening
- A clean record from the Department of Motor Vehicle's
- Must be willing to provide proof of automobile insurance
- Must have knowledge of safety practices and procedures
- Must have a neat appearance and a sincere desire to volunteer
- Must be willing to complete training

Scope_of_Work:

Provide transportation for seniors, persons with disabilities, and those seeking non-emergency transportation throughout the state of Michigan.

Responsibilities:

Provide Door to Door transportation while following the volunteer driver policies and handbook.

Page 2

Time Required:

Each trip depends on the client's need for transportation. All trips are provided during the same day during the hours of 5AM-9PM Monday through Friday and Saturday from 9AM to 5PM.

Compensation:

Each driver is eligible for mileage compensation.
Meal reimbursement is available for trips over 4 hours (see meal policy)

Riders can schedule rides for any of these purposes:

Medical	All non-emergent medical appointments
Medical	All medical appointments that are not life sustaining, including: dental, vision, and physical therapy.
Life Sustaining Medical	dialysis, chemotherapy, and radiation treatments

Page 3

Part I—Cadillac/Wexford Authority Business

Confidential Information

Personnel Records

A file is maintained as a record of Volunteer at Cadillac/Wexford Transit Authority. It is important for this record to be up-to-date and complete.
Notify the Mobility Coordinator if there are any changes in any of the following areas: name, address, telephone, email address, auto insurance changes, the person to notify in case of emergency and other relevant information.

All volunteer information and documents are the property of Cadillac/Wexford Transit Authority. Only authorized personnel may disclose confidential volunteer information, to persons or entities outside the organization with appropriate consent from the volunteer.

Social Security Number Privacy Policy

It is the policy of Cadillac/Wexford Transit Authority to protect the confidentiality of Social Security numbers obtained in the ordinary course of company business from employees, volunteers, vendors, contractors, customers, or others. No person shall knowingly obtain, store, transfer, use, disclose, or dispose of a Social Security number that Cadillac/Wexford Transit Authority obtains or possess except in accordance with the Social Security Number Privacy Act.

Policy on Non-discrimination and Sexual Harassment

Non-discrimination

ADA Americans with Disabilities Act (ADA) was passed by the US Congress in 1990. It is an extensive civil rights law designed to remove barriers that prevent people with disabilities from enjoying the same opportunities that are available to persons without disabilities. It is the Cadillac/Wexford Transit Authority's philosophy and policy that any unlawful discrimination against any volunteer, employee or applicant based on race, color, sex, religion, national origin, age, handicap, height, weight, arrest record, veteran or marital status or membership in another protected group will not be allowed or tolerated. This policy applies to all employment practices including but not limited to recruiting, hiring, pay rates, conditions of employment and termination.
Cadillac/Wexford Transit Authority also prohibits any form of harassment, joking remarks, stories, nick names, or other abusive conduct directed at employees or volunteers because of their race, color, sex, religion, national origin, age or handicap, height, weight, arrest record, veteran, marital status or membership in another protected group.

Page 4

Sexual_Harassment

Cadillac/Wexford prohibits sexual harassment of any employee or volunteer. Sexual harassment is prohibited because it is intimidating, an abuse of power, and is inconsistent with the Company's policies, practice and management philosophy. Sexual harassment is defined as unwelcome sexual advances, requests for sexual favors, and other verbal or physical conduct of a sexual nature. Sexual harassment can take the following forms:

- Sexual conduct that interferes with another person's work performance or creates an intimidating, hostile or offensive work environment.
- Personnel decisions (e.g. promotion, raises, scheduling) made by a supervisor or boss based on the employee's submission to or rejection of sexual advances.
- Submission to a sexual advance used as a condition of keeping or getting a job, whether expressed in explicit or implicit terms.

Specific examples of sexual harassment may include: sexual advances or propositions, requests for sexual favors, verbal abuse of a sexual nature, unnecessary touching, the display of sexually suggestive objects or pictures, sexually explicit jokes, or physical assault.

Employee_Recourse

Any employee or volunteer who feels subjected to discrimination or harassment by any supervisor, management official, other employee, customer, client, or any other person in connection with employment at Cadillac/Wexford should immediately report it to his/her supervisor or an officer of the Authority personally. An employee or volunteers who is uncomfortable for any reason in bringing such a matter to the immediate attention of his/her supervisor. Should report the matter to another Authority official. Also, any questions about this policy, discrimination or harassment should be brought to the attention of these persons.

Such reports will be investigated promptly. If the report has merit, disciplinary action will be taken against the offender. Depending on the severity of the misconduct, the disciplinary action could range from a warning to termination.
Complaints of this nature will be maintained in confidence and divulged to the extent necessary to complete the investigation and determine the appropriate resolution. The Authority prohibits retaliation against any person who brings a complaint of discrimination or harassment or who takes part in the investigation of such a complaint.

POLICY STATEMENT ON VIOLENCE IN THE WORKPLACE

Policy_on_violence_in_the_workplace

Page 5

The Authority has adopted this Zero Tolerance Policy for workplace violence because it recognizes the need to reasonably provide for the safety and security of all employees, management, volunteers, and members of the public. Therefore, the Authority will not tolerate, in any fashion, violence in the workplace. Consistent with the policy, physical attacks, verbal or physical threats, destruction of property, verbal and physical intimidation or abusive language which involve or affect the Authority, which occur on Authority property, or while conducting Authority business will not be tolerated.

In addition, unless otherwise authorized by law, no person is permitted to bring a dangerous weapon on Authority property, posses, or use a dangerous weapon while conducting Authority business. The only persons who are excepted from this rule are law enforcement personnel. In accordance with this rule, possession or use of dangerous weapons is also prohibited in Authority vehicles or any personal vehicle which is on Authority property or used for Authority business.

The Authority intends to use reasonable legal, managerial, administrative, and disciplinary procedures to secure the work place from violence and to reasonably protect employees, volunteers, and members of the public.

If an employee or volunteer is in violation of this policy, the Authority will initiate an appropriate response. This may include, but is not limited to, immediate removal form Authority premises and suspension pending investigation, reassignment of job duties, suspension or termination of employment, suspension and/or termination of any business relationship, and/or criminal prosecution of the person or persons involved.

If any person has a question about his or her rights or obligations under this policy, they should contact their supervisor.

Specific_Examples_of_Prohibited_Conduct

Specific examples of prohibited conduct in violation of this policy include, but are not limited to the following:

- Hitting, shoving, or punching an individual,
- Threatening to harm an individual or his/her family, friends, associates, or property,
- Destruction or threat of destruction of property owned, operated, or controlled by the authority;
- Possession or use of a gun, or other dangerous weapon on Authority property or while conducting Authority business;
- Making harassing or threatening telephone calls, letters or other forms of written or electronic communications, and
- Harassing surveillance (i.e. Stalking).

Responsibility of Employees and Volunteers

All employees and volunteers are responsible for:
- Refraining from acts of violence;
- Seeking assistance to resolve personal issues that may lead to acts of violence;
- Reporting immediately to supervisor and the Police Department any acts of violence or situations where the employee believes violence is imminent;
- Reporting immediately to a supervisor and the Police Department when an employee or volunteer believes that there is a possibility of violence either against himself or herself or against another individual;
- Informing your Supervisor, and the Police Department, if you have applied for or obtained a personal protective order (also called a restraining order or PPO) which list Authority property or Authority facilities as being protected areas.
- Cooperating fully with police, other law enforcement officials, and management in the investigation and/or prosecution of violent acts.

Reporting Incidents

If an employee or volunteer observes or becomes aware of an individual's abnormal behavior or serious personal problems that could lead to violence, whether or not that individual is an employee or volunteer, the employee or volunteer is required to promptly report the matter to his or her supervisor, another supervisor, or another Authority official. Every violation of this policy must be reported immediately.

No employee or volunteer will be subject to retaliation who, in good faith complains of, reports, or participates in an investigation of, an occurrence of violence or threat of violence. However, if an employee or volunteer knowingly makes a false report of an incident of violence or other violation of this policy, he or she will be subject to disciplinary action, up to and including discharge.

CADILLAC/WEXFORD'S STRAIGHT TALK POLICIES

Open Door Policies and Procedures

Our goal at Cadillac/Wexford is to provide a pleasant working environment for all volunteers and employees. This is achieved by developing and maintaining a cooperative working relationship among volunteers and employees based on mutual respect and understanding. We recognize the need for procedures that will allow employees and volunteers to call attention to work-related matters that they feel need correction.

We Strongly endorse an "Open Door" Policy where an employee or volunteer has the right to meet with his or her supervisor to discuss such matters of concern.

Page 7

The Authority's "Open Door" Policy is in effect during each working day. Our success has been built on the free exchange of ideas, creative management and the identity of problem areas and their quick resolution. The "Open Door" Policy provides you with ways to let us know your problems, suggestions or ideas.

Suggestions

The managers and supervisors of Cadillac/Wexford Transit Authority don't have all the answers. We know from time to time you will have ideas on how to make the Cadillac/Wexford Transit Authority more efficient. At the moment that the idea occurs to you, please take time to put it in writing. Suggestion forms are available from your supervisor. We strongly encourage suggestions on improving the operation of the Authority. We have grown because of our employees' concern, industry, and active participation in our development. We count on you and want your ideas.

POLICY STATEMENT ON SUBSTANCE ABUSE

It is essential that all employees and volunteers be alert and in full possession of their faculties when working to protect the safety of our work force, our work place, and the public, as well as promote high standards of conduct, integrity and efficiency. Being under the influence of or being impaired by drugs and alcohol can cause permanent injury or death.

Accordingly, no employee or volunteer may report to work or remain on duty while under the influence of or impaired by alcohol or current illegal use of drugs. No employee or volunteer may possess, sell or distribute alcohol or drugs to be illegally used while on Authority property or on Authority time.

The Authority reserves the right to require applicants, volunteers, or employees to submit to drug testing.

Smoking

It is Cadillac/Wexford Transit Authority's objective to provide a smoke-free environment within the Company. This includes areas such as the entrances and garages. Cadillac/Wexford Transit Authority does not permit smoking by Drivers or passengers on any Cadillac/Wexford Transit Authority vehicle at any time. Drivers have the authority to refuse transportation to any passenger who fails to comply with Cadillac/Wexford Transit Authority's no-smoking policy.

Volunteers and visitors may smoke in the outside area surrounding Cadillac/Wexford Transit Authority in the designated smoking areas. However, Cadillac/Wexford Transit

Page 8

Authority asks that smoking materials are properly disposed of and these areas are kept free of associated trash.

Dress Code

Drivers are required to carry their valid driver's license, current copy of vehicle registration, and Cadillac/Wexford Transit Authority I.D. badge at all times.

Your personal cleanliness and appearance is of importance to both yourself and the Authority. Our requirements are simple and reasonable—we expect you to dress neatly and avoid any apparel that may not be in keeping with good business taste and safety standards. Although by no means inclusive, the following are a few dress requirements:

a. All volunteers must wear volunteer ID badges for identification.
b. Volunteer drivers should wear the shirts that are provided.
c. Garments should cover the body. Avoid exposure.
d. Clothing containing suggestive words or pictures should not be worn. Examples include: Obscenity, nudity, and other suggestive printed designs on blouses, shirts, and pants.
e. Wear shoes that are comfortable and safe. Avoid slippers, sandals, thongs, and other open-toe style shoes. Footwear must be appropriate for the job performed. Shoes must be worn during working hours.
f. Do Not wear loose clothing, neckties, long sleeves or jewelry (rings, watches, necklaces, bracelets, etc.) that might get caught or tangled in moving equipment.
g. Hair should be worn at a safe length.
h. All employees and volunteers shall maintain acceptable personal hygiene and grooming standards.

Attendance_and_Punctuality

Regardless of position with the organization, punctuality and regular attendance are essential for the efficient operation of Cadillac/Wexford Transit Authority.

Please make sure to contact a staff member-- no voice mail—no text.

Page 9

Volunteers who are going to be absent or late, must notify the mobility coordinator, at 231-775-9411 or dispatch at 231-779-0123, so they may contact the mobility coordinator as soon as possible before the scheduled transport.

All Volunteer Drivers should notify Cadillac/Wexford Transit Authority at least two (2) hours before the ride starts so arrangements can be made for someone to cover the ride. If the Mobility Coordinator is not available @ 231-775-9411, contact dispatch @ 231-779-0123.

IF YOU ARE GOING TO BE LATE TO PICK UP A RIDER notify the Dispatch department, 231-779-0123

Messages left with other volunteers or on voice mail is not acceptable.

Failure to call in when you will be absent from trips you accept, often puts Cadillac/Wexford Transit Authority in difficult position to cancel trips which may result in hardship for riders.

Inclement Weather/Emergency Closings

Safety is paramount, so any decision about whether to drive during inclement weather is completely up to the volunteer. If you want to cancel a ride for weather related reasons, please notify Cadillac/Wexford Transit Authority as soon as possible so we can contact the client. If inclement weather should occur and a volunteer is unable to perform their work duties because the facility is closed and/or route has been cancelled Cadillac/Wexford Transit Authority will notify the volunteer as soon as we can before departure.

PART II-- Driver Specific Policies

Personal Vehicle for Cadillac/Wexford Transit Authority Business

Non-Client Passenger Policy

Transporting of non-client passengers, such as friends, spouses, relatives and children of Cadillac/Wexford Transit Authority, while volunteering is prohibited. Especially when using a Cadillac/Wexford Transit Authority vehicle. Our insurance company has indicated that this practice is not advisable and has the potential to increase Cadillac/Wexford Transit Authority's liability. Please contact CWTA staff to get approval in extreme situations.

Cell Phone Policy

Our mutual security is based upon the Cadillac/Wexford Transit Authority's ability to provide safety reliable transportation. Cadillac/Wexford Transit Authority volunteers will follow state and federal laws regarding cell phone usage in a vehicle. We encourage placing your

Page 10

phone to "silent mode" and only using hands-free devices if absolutely necessary while transporting for Cadillac/Wexford Transit Authority.

Insurance

State regulations require that the vehicle owner must retain insurance coverage for a vehicle. Initial insurance claims on the vehicle are always made to the owner's insurance policy. **Cadillac/Wexford Transit Authority is not responsible for damage to a volunteer's vehicle while the vehicle is in use on Cadillac/Wexford Transit Authority business.** Since the volunteer must look to personal auto insurance coverage if an accident occurs, it is important that adequate limits of personal liability and physical damage coverage be maintained on the vehicle. Volunteers who use their vehicle to perform volunteer rides are required to show proof of insurance that meet the minimum guidelines for the state of Michigan.

Cadillac/Wexford Transit Authority has purchased additional excess accidental medical coverage, excess volunteer liability insurance, and excess automobile liability insurance through CIMA Volunteers Insurance. Details of the program are listed in appendix A.

Safety/Reporting of Injury

Cadillac/Wexford Transit Authority strives to practice safety with vigor at all levels of the organization and all functions of business. Cadillac/Wexford Transit Authority's goal is to provide a safe and healthy work environment. Volunteers are responsible for whole-hearted, genuine cooperation with all aspects of the safety, and for continuously practicing safety while performing volunteer duties.

All incidences while driving, assisting a passenger, and during the time you are volunteering that you witness, or are personally involved with are expected to be communicated to the Mobility Coordinator, Dispatch staff, or CWTA Management.

Confidential Information

Volunteers of Cadillac/Wexford Transit Authority may have access to confidential information. This means any information that is not generally known or accessible by the public. It would include, but is not limited to, volunteer phone numbers and addresses, client addresses, medical information regarding volunteers and/or clients. Any copying, reproducing or distributing of confidential information in any manner must be authorized by management. Disclosure of or discussing confidential information is subject to disciplinary action.

Passenger Pick up Policy

Cadillac/Wexford Transit Authority Volunteer drivers offer a door-to-door service.

Page 11

Cadillac/Wexford Transit Authority Volunteer drivers ask the passengers if they need an arm for support. We stay close to the passenger as they go to or from the vehicle and stand close to them as they enter and get seated.

While we go the extra mile to assist our passengers, we never help people dress, physically help them transfer from a wheelchair to a chair, put away groceries, make beds or any other activity beyond helping them get to and/or from the vehicle and out of /into a location. Any questions on this, you need to speak to the mobility coordinator.

When picking up a passenger from their residence, they have five minutes to get out of their door to the vehicle. It is imperative for you to support this policy so that our volunteer efforts do not alter the expectations of Cadillac/Wexford Transit Authority in its operating policies.

When you arrive:
- Leave the vehicle and knock on the door.
- If there is no answer, return to the vehicle and call dispatch that you are not getting a response. They will phone the passenger.
- Dispatch will inform you if they were able to reach the passenger or not. They will also inform you of what your next course of action should be.
- If the passenger comes to the door but tells you they are not ready, let them know they have five minutes to get ready.
- Wait up to five minutes. If they come out, walk them out to the vehicle.
- If they do not come out, inform dispatch and follow their instructions.
- If the passenger does get in your vehicle, verify the trip with them.

If you are running late and you know you will be unable to get your passenger to their appointment on time, let dispatch know ASAP. Dispatch may be able to contact the appointment and let them know what time to expect you.

When you are picking up the passenger from an appointment, you may show up 15 minutes earlier, but you must wait until five minutes after the pickup time before they are a "will call".

A "will call" is someone who is not ready to leave their appointment by five minutes after the time listed on the manifest and your arrival. This applies to all return trips. Please contact dispatch and make other arrangements.

We never leave a rider stranded. If we took a passenger somewhere, every attempt is made to get them home or we will make other arrangements to get them back to their residence.

Page 12

If at any point something occurs while you are volunteering and you are unsure how to handle. Please call into the mobility coordinator or to dispatch to get assistance.

No Show Policy

No-Shows and Same-day cancellations deprive other Cadillac/Wexford Transit Authority customers of rides. Passengers need to be considerate and protect themselves from possible suspension of services.

A Cadillac/Wexford Transit Authority passenger is considered a "no show" if
1. They are not at home or cannot be located at the time of their scheduled pick-up.
2. They decide at the scheduled time of pick-up they are not going.
3. They are not ready to depart within five minutes of their scheduled pick-up time.

Every effort will be made to work with individual passengers and their care providers to make them aware of the potential consequences of repeated no-shows.

A passenger's cognitive abilities will be considered when deciding whether or not to suspend service regardless of the number of no-shows. Passengers accessing dialysis treatments or other life-sustaining services will not be suspended for no-shows under any circumstances.

All decisions to suspend service will be made by the Operations Manager or the Executive Director with input from the Mobility coordinator and partnering agencies.

Assisting Passengers – Limited Physical Assistance

For the safety of our driver's, and passengers it is Cadillac/Wexford Transit Authority's policy that driver's do not assist wheelchair/scooter passengers by physically lifting them in or out of their seat.

The only exception to this rule would be in case of an emergency, if not doing so would place the passenger in a more hazardous situation.

Our drivers at Cadillac/Wexford Transit Authority historically have been asked to go more than the extra mile. It is extremely important we communicate to our volunteer drivers exactly what our limitations are in regards to providing assistance to our passengers.

Please remember if you are asked to physically assist a passenger which would require full bodily weigh support/balance of the passenger, anything more than minimal physical effort on drivers part:

These acts of kindness are not only unsafe, but they leave us wide open for a variety of liability claims, which could include sexual harassment, etc.

Page 13

Cadillac/Wexford Transit Authority considers this to be an "Unsafe Action".

The assistance we offer our passengers in moving in or out of their seat is:

- Limited by the driver's ability to pull or push using his/her own weight to counter the weight of the passenger.
- If that limited force is not effective in assisting the passenger, the passenger cannot be moved. Lifting a passenger or otherwise using one's back or shoulder muscles to move a passenger is not permitted.

If the passenger requires such assistance:

- The driver needs to immediately call dispatch and inform them of the situation.
- At that point, the dispatcher will instruct the driver to inform the passenger we cannot provide transportation at this time and the driver can suggest to the passenger they get a provider or an aide to assist them in and out of their wheelchair or scooter.
- Dispatch will inform the driver to write an incident report. The incident report will be given to Cadillac/Wexford Transit Authority Management and it will be their responsibility to follow up with the passenger.

Stair Assistance Procedures

All ambulatory passengers will be escorted to and from the vehicle. The travel path may include an undetermined number of stairs at which the operator will need to offer assistance.

Upon arrival at the passenger's P/U and D/O driver will escort the passenger to and from the vehicle assisting them down or up any stairs or steps along the route which includes the stairs into the vehicle. Assistance up/down stairs will include careful observations and verbal directions when appropriate. The operator is responsible to offer minimal physical assistance such as offering an elbow or shoulder for improved balance. Anytime the vehicle is unattended (out of arms reach) the operator must take the keys with them.
Unsafe Conditions

Operators shall not assist passengers in unsafe conditions such as:

- Adverse weather conditions such as deep snow and ice
- Unsafe stairs
- Unsafe and/or steep ramps/driveways
- Aggressive pets

Driver will contact the mobility Coordinator or Call Center Dispatch to inform them of these situations.

Meal_Policy:

The New Freedom program through Cadillac/Wexford Transit Authority will provide the volunteer driver reimbursement for a meal if the transport takes more than 4 hours. Please note that the reimbursement is for the volunteer only. We cannot reimburse for clients, or anyone else.
The meal must not exceed the state guidelines for meals. Cadillac/Wexford Transit Authority will notify you if you are traveling over 4 hours and will need to purchase a meal. If you are delayed and your transport becomes more than 4 hours please contact dispatch so they can provide you details for meal reimbursement.

In order to receive reimbursement, you must provide a complete receipt. The receipt must have the correct date. It also needs to have the food items purchased listed. A credit card receipt will not work. Also, in order to be reimbursed you cannot purchase tobacco or alcohol products.

Incidental_Expenses_Policy:
Cadillac/Wexford Transit Authority will reimburse for incidental travel expenses related to the non-automobile cost the volunteer incurs such as: parking and highway tolls. As long as a receipt with the correct date is provided to Cadillac/Wexford Transit Authority.

Cadillac/Wexford Transit Authority and its partners will not be responsible for Automobile expenses such as: traffic/parking fines, towing charges, gasoline, oil changes, and general repairs. These expenses are to be included in the mileage reimbursement.

Part III Driver and Passenger Code of Conduct Policy

Volunteer drivers do not accept monetary tips.

Driver/Passenger_Interaction_Policy

Cadillac/Wexford Transit Authority drivers are expected to provide caring, customer-focused transportation services to passengers in support of our mission. This is a large responsibility and one that requires a high degree of integrity and professionalism as well as patience and compassion.

Our passengers are a microcosm of the communities in which they live and have diverse personalities, attitudes, beliefs, interests and life stories. Getting to know them is one of the rewards of being a Cadillac/Wexford Transit Authority driver and an important component of good customer service.

For the benefit and protection of passengers and drivers alike this policy establishes driver/passenger interaction:

This policy is not intended to discourage driver/passenger relationships and interactions that are based on Cadillac/Wexford Transit Authority's core values of integrity in all our dealings, respect for individuals, and caring for our passengers.

Drivers often develop very positive, trusting and long-term relationships with passengers they have transported for months or years and may come to know many personal details of their lives.

The nature of the job also often requires some degree of physical contact with them (e.g. assisting them in/out of a vehicle or securing passenger wheelchairs, etc.).

The following list of conducts, while not inclusive, will result in disciplinary action up to and including termination and should serve as the basis for activities that should never occur with passengers:

- Asking for their phone numbers
- Making sexual advances or suggestive remarks, including comments on physical attributes.
- Solicitation of sexual activity or other sexual behavior by promise of reward.
- Fondling, groping, rubbing, kissing or touching inappropriately.
- Otherwise engaging in imposing behavior of a sexual nature.

Other boundaries that may cause problems if crossed and are therefore discouraged:

- Dating passengers will result in disciplinary action if substantiated complaints are made as a result of the relationship.
- Dating passengers with developmental disabilities could also result in criminal charges if complaints of inappropriate behavior are received and substantiated even if the behavior was "consensual".

1. Many persons with developmental or other disabilities are considered to be legally "at-risk" individuals and therefore more vulnerable to be abused or taken advantage of by people they trust and rely on for services/care.
2. Becoming socially involved with passengers' off-duty also carries some risk and if the relationship results in substantiated complaints, then disciplinary action will result.
3. Volunteer drivers have the responsibility to assist passengers to the door of their homes

Page 16

4. Provide only the physical assistance necessary for the safety of the passenger when they enter and exit the vehicle.
5. Drivers should never cross the threshold of the door.
6. Drivers should never serve as "personal care attendants" by assisting riders with dressing or undressing, transferring riders from bed to a wheelchair, or by performing other chores or activities.
7. Drivers may also encounter inappropriate, unwelcome or suggestive remarks or behaviors from passengers that put them in an uncomfortable situation. Incidents of this nature should be immediately discouraged by drivers at the time they occur, written in Incident Reports and reported to your supervisor on the same day they occur so they can be acted upon immediately.

Always complete and submit Incident Reports for any conversation, physical contact or other interaction with a passenger that is out of the ordinary and might be cause for concern by them or you.

Cadillac/Wexford Transit Authority thoroughly investigates all passenger and driver complaints using all necessary internal and/or external resources to determine their validity and to make a fair and objective decision as to the action, if any, taken to remedy the situation.

If drivers are unsure whether boundaries have been crossed by a passenger, or have questions about what constitutes appropriate or inappropriate behavior between themselves and passengers, always seek guidance from the Mobility Coordinator, Operations Manager, Human Resources Manager or Executive Director.

- Cadillac/Wexford Transit Authority serves people from different backgrounds and life circumstances. We recognize that many of the people who rely on our services may be in pain (emotionally or physically), socially isolated, facing loss of loved ones or experiencing other challenging life circumstances.

- Cadillac/Wexford Transit Authority's staff are expected to go to great lengths to treat passengers with dignity, respect and courtesy in every situation. In return, we expect our passengers to behave responsibly and at a minimum refrain from abusive, menacing or threatening behavior towards Cadillac/Wexford Transit Authority's staff, Cadillac/Wexford Transit Authority Volunteer drivers, or other passengers.
- Use of Cadillac/Wexford Transit Authority's service is a privilege, not a right, and passengers must maintain acceptable levels of conduct in order to remain eligible to use our service.

The following types of passenger behaviors may result in a suspension of services:

1. Physically assaulting any Cadillac/Wexford Transit Authority employee, Volunteer driver, or passenger (this includes throwing objects).

Page 17

2. Making threatening or menacing statements or comments to any Cadillac/Wexford Transit Authority staff member, Cadillac/Wexford Transit Authority Volunteer drivers, or passenger.
3. Using profane language towards any Cadillac/Wexford Transit Authority staff member, Cadillac/Wexford Transit Authority Volunteer drivers, or passengers.
4. Making derisive comments towards any Cadillac/Wexford Transit Authority staff, Cadillac/Wexford Transit Authority Volunteer drivers, or calling them derogatory names.

Every effort will be made to work with individual passengers and their care providers to make them aware of the potential consequences of Code of Conduct violations.

Depending upon the gravity of the situation, first time offenders will usually receive a written warning that further unacceptable behavior could lead to a suspension of service. If the offense is considered egregious (e.g. assault or threatening comments) then suspension may occur without written warning.

A passenger's cognitive abilities will be considered when deciding whether or not to suspend service. The safety of the individual and Cadillac/Wexford Transit Authority's staff and passengers will be the largest factor when considering their suspension.

The duration of suspension may vary from one week to permanently, depending upon the number and severity of offences. All decisions to suspend service will be made by the Mobility Coordinator, Operations Manager, or the Executive Director.

Personal Assistants

An aide or personal assistant who accompanies a customer can be quite useful to the driver. If an aide would like to help carry in groceries or hold a door, that is fine. However, aides or assistants may not take on any of the safety-related responsibilities associated with the driver's job. You are the one who should escort, board, and secure your passengers as needed. While assistants are a great help, you are in charge of everything that goes on in and around, to and from your vehicle.

MOBILITY SERVICES/ SAFETY RULES

These safety rules are designed to provide you with knowledge of the recognized and established safe practices and procedures that apply to many of the work situations you may encounter while employed by this organization. It would be impossible to cover every situation. If you are in doubt about the safety of any condition, practice or procedure, consult your supervisor for guidance.
Remember to practice SAFETY 1st

Page 18

General Rules:

ACCIDENT REPORTING: Drivers are required to immediately report all accidents or incidents to dispatch. Falsification of records, time records or safety documentation is not tolerated.

HAZARD REPORTING: Notify the dispatcher immediately of any unsafe condition.

DRIVING: While driving a vehicle owned or operated by Cadillac/Wexford Transit Authority, or volunteering to drive your own vehicle, please obey all traffic laws and signs at all times. Wear your seat belt at all times. Do not drive over the posted speed limits, and NEVER text and drive.

PERSONAL PROTECTIVE EQUIPMENT (PPE): Appropriate PPE must be used at all times. PPE will be allocated and training completed as necessary based on each job task.

Bodily Fluid Spill Procedures: Physical contact with bodily fluids such as blood, vomit, urine or feces presents risk of exposure to blood-borne pathogens. You assume that any bodily fluid you encounter is contaminated, so the use the gloves provided for cleaning up every spill.

Page 19

Volunteer Guide

Appendix- forms for Volunteer Driver

<u>In this package you will find:</u>

Appendix A CIMA Volunteer Insurance
Appendix B Pre/Post Trip Inspection form
Appendix C Incident Report
Appendix D Transportation Plan Correction Form
Appendix E Medical Transportation Refusal &
             Release of Liability

Page 20

Appendix B

Cadillac/Wexford Transit Authority
New Freedom Program

"Five Minute" Pre & Post Trip Checklists

Date_____   Driver Name _____

<u>PRE-TRIP CHECKLIST</u>

Odometer start   _____
    <u>Check these:</u>   <u>Process:</u>

UNDER THE HOOD
1. Oil level   ☐
Visually check these:
2. Coolant level   ☐
3. Brake Fluid level   ☐
4. Is your gas tank full   ☐

Vehicle condition: Satisfactory ☐   Unsatisfactory ☐

1. Leaks under vehicle   ☐
2. Tire tread / Inflated   ☐
3. Lights*   Turn all on, walk around car   ☐
   *signals, hazards, headlights, brake lights

INSIDE VEHICLE:
1. Wipers   Test once   ☐
2. Steering Wheel   Rotate wheel   ☐
3. Heater / Air   Turn on, then off   ☐
4. Mirror   Adjust   ☐

DO YOU HAVE:
1. CWTA, phone number   ☐
2. Charged smart phone (cell phone)   ☐
3. Red informational binder/transportation plan   ☐
4. 1st aid kit   ☐
5. Current car registration and insurance   ☐

_____

Volunteer Driver Signature   Date

—

<u>POST-TRIP CHECKLIST</u>

Odometer Finish   _____
    Clean out interior   ☐

PAPER WORK
1. Finalize Trip Verification
2. receipt for meal reimbursement
3. Agent Casher Report Veteran's

PROBLEM REPORT-explanation of
defects or comments

If there is a problem, contact mobility
coordinator or operations manager.

_____
_____
_____
_____
_____
_____
_____
_____
_____
_____
_____
_____

Page 21

Appendix C

Cadillac/Wexford Transit Authority
New Freedom Program

VOLUNTEER INCIDENT REPORT

Volunteer's Name: _____ Date: _____

Location of Incident: _____ Time: _____

Passenger's Name: _____

Please describe incident in detail (Please print and use the back side of this page if necessary)

_____

_____

_____

_____

_____

_____
Volunteer Driver's Signature   Date

Date Received: _____
Action Taken:

_____

_____

_____

_____

_____

_____
Supervisor's Signature   Date

Page 22

Appendix D

Cadillac/Wexford Transit Authority
New Freedom Program

Transportation Plan Update or Correction

Date_____

Driver: _____

Client Name: _____

Pick up Time: _____

Address: _____

Correction Needed:

_____

_____

_____

_____

_____

_____

_____

Correction requested by (Customer signature):

Please submit request to mobility Coordinator
Correction made by (Driver): _____

Date: _____   Time:_____

Page 23

Appendix E

Cadillac/Wexford Transit Authority
New Freedom Program

Medical Transportation Refusal and Release of Liability

I_____ have been advised that I may request
     (Print Name)

Immediate medical attention and be taken to a medical facility/emergency hospital
for a medical examination as a result of an incident involving a CADILLAC/WEXFORD
TRANSIT AUTHORITY owned or operated vehicle on

_____
     (Date)

I have declined the offer to be transported to a medical facility and I have assured the
CADILLAC/WEXFORD TRANSIT AUTHORITY driver that am not injured. I do not hold
CADILLAC/WEXFORD TRANSIT AUTHORITY or the driver responsible for this incident.

_____   _____
(Signature of Passenger)   (Date)

_____   _____
(Signature of Witness)   (Date)

_____   _____
(Signature of Provider)   (Date)

_____   _____
(Signature of Driver)   (Date)

Comments:
_____
_____
_____
_____

Page 24

I have received a copy of Cadillac/Wexford Transit Authority's volunteer Guide dated

I understand that neither I nor the company is committed to Volunteer relationship for a fixed period of time. Volunteer with Cadillac/Wexford Transit Authority is at-will. Both I and management have the right to terminate this Volunteer at any time for any reason. The language used in this Guide and any verbal statements of management are not intended to constitute a contract of Volunteer, either express or implied, nor are they a guarantee of Volunteer for any specific duration.

I understand that no representative of Cadillac/Wexford Transit Authority, other than the President of the Board of Directors, has authority to enter into an agreement of Volunteer for any specified period and such agreement must be in writing, signed by the President and me. We have not entered into such an agreement.

Further, I understand that the contents of this Guide are summary guidelines for volunteers and therefore not all inclusive. This Guide supersedes all previously issued editions. Except for the at-will nature of Volunteer, the company reserves the right to suspend, terminate, interpret, or change any or all of the guidelines mentioned, along with any other procedures, practices, benefits, or other programs of Cadillac/Wexford Transit Authority. These changes may occur at any time, with or without notice.

_____

Print Name

_____   _____

Volunteer Driver's Signature   Date

Page 26

Handbooks, Guides, and Forms for Riders

Section 3 - Important Information About Riders speaks to the needs of riders. It is important that riders understand the scope of services that the volunteer driver program is able to provide. The resources included here are outstanding examples of rider guides that include necessary information and guidance for riders.

Available on Program Website:

HopeLink Community Van – Rider Expectations and Policies (includes expectations for youth riders)

No-Show Policy, WexExpress New Freedom 2018

Ride Connection Rider Service Guide

Rural Washington Door to Door Service Fact Sheet

Space Coast Area Transit: Rider's Guide for Special Services - A Public Transportation Rider's Guide for Eligible Seniors and Transportation Disadvantaged, Including Origin to Destination TD Paratransit Service and ADA Paratransit Service. - This publication also includes guidance and directions for prospective Riders and Volunteers.

Volunteers in Motion - A professional video explaining all aspects of the program.

WexExpress New Freedom Ride Request Form

Included below:

Customer Guidelines, WexExpress New Freedom Program, February 2018

Rider Guide to Volunteer Transportation in King County, King County Mobility Coalition (KCMC)/Eastside Easy Rider Collaborative, April 2021

Rider Information Fliers, Hopelink Community Van

- Ride With Community Van!
- Borrow The Community Van!

[Rider Guide to Volunteer Transportation in King County](#)**, King County Mobility Coalition (KCMC)/Eastside Easy Rider Collaborative, April 2021 (14 pages)**

INTRODUCTION

This rider guide is tailored to provide potential and existing volunteer transportation users with an easy resource of all volunteer driver programs operating in King County and how to utilize them. Volunteer driver programs provide an essential service within the region's transportation network. These volunteer programs serve the diverse populations throughout King County with affordable, safe, and accessible mobility within their communities. Volunteer driver programs tend to offer more flexibility than other transportation services and are critical in helping to ensure all community member are able to get where they need to go.

Below are a few examples of why volunteer driver programs are so valuable in your community:

- Point-to-point services
- Offer their services at a variety of times during the day
- Provide rides to critical destinations such as work, school, medical, etc.
- Offer important socialization opportunities
- Cost-effective way to offer another transportation option
- Transport critical resources to clients who are unable to leave their residence

Please reach out to Hopelink Mobility Management's Transportation Resource Line (TRL) with questions, concerns, or additional transportation support. The Transportation Resource Our TRL is staffed Monday through Friday from 9:00AM to 4:00PM. Call us at (425) 943-6760 or email mobility@hopelink.org. Learn more about the King County Mobility Coalition (KCMC) and subregional coalitions online at KCMobility.org.

For more information on alternative transportation options, FindARide.org is a comprehensive online resource for wayfinding transportation services in King County, Snohomish County, and Pierce County. Users can navigate the website by specifying the region they are traveling within and the individual support they need from a transportation service provider.

Visit us online at hopelink.org for more information about additional programs and services Hopelink Mobility Management offers.

Eastside Easy Rider
COLLABORATIVE

PAGE | 2

TABLE OF CONTENTS

VOLUNTEER TRANSPORTATION PROGRAMS COMPARISON CHART

Volunteer Driver Program	Service Area	Eligibility	Trip Purpose	Schedule Notice	Service Fee	Service Hours	COVID-19 Response
American Cancer Society	King County; can cross county lines	Must be going to or from cancer treatment appt	Medical	4 days	No	Mon – Sun Flexible	No service
Catholic Community Services (CCS)	King County	60+ years or 18-59 years w/ disability	Priority: Medical & Essential	7 days	No	Mon – Sun Flexible	Limited service
Eastside Friends of Seniors	Sammamish & Issaquah	60+ years	Priority: Medical & Essential	7 days	No	Mon – Fri 8AM – 8PM	Full service
Kaiser Permanente Transportation Assistance	King County; can cross county lines	Kaiser client and 60+ years	Medical	14 days	No	Mon – Fri 9AM – 4PM	No service
Metro Community Van	Specified regions in King County	No age or income requirement	Flexible	2 days	Yes	Mon – Sun Flexible	Full service
Northshore Senior Center	Specified regions in King and Snohomish County	60+ years	Medical or Food Access	2 days	No	Mon – Fri 8AM – 5PM	Limited service
Snoqualmie Valley Transportation	North Bend, Snoqualmie, Fall City, Preston	60+ years	Medical	7-14 days	$1 suggested donation	Mon – Fri 8AM – 5PM	Full service
Sound Generations Volunteer Transportation	King County	60+ years and King County residents	Medical, Dental, & Essential	7 days	No	Mon – Fri 8AM – 5PM	Full service

◢ AMERICAN CANCER SOCIETY

Christine Geneus-Hill
Title: Senior Program Manager
Email: Christine.GeneusHill@cancer.org
Phone: (425)-404-2244
Website: http://www.cancer.org

Physical address: 2120 1st Avenue N.
Seattle, WA 98120

COVID-19 Response: Please note this program is currently out of service due to COVID and not accepting ride requests at this time.

Service Area: All of King County; however, drivers can cross county lines (typically travel to Snohomish County for Evergreen or Northwest Hospitals).

Service Hours: Monday through Sunday; based on day and time of rider's medical appointment.

Rider Eligibility:

- No age or income requirement
- All clients must be ambulatory
- Destination specific criteria: must be traveling to and from cancer treatment appointments to be eligible

How to Schedule a Ride:

- Call 1-800-227-2345
- Ride scheduling hours: Monday through Friday, 8:00AM to 5:00PM
- Client must call four business days in advance of appointment
- Able to set up re-occurring appointments
- Unable to accommodate day-of ride requests

Payment: No charge to riders.

Eastside Easy Rider
COLLABORATIVE

CATHOLIC COMMUNITY SERVICES (CCS) OF WESTERN WASHINGTON

Volunteer Services
Email: vc@ccsww.org
Phone: (206) 328-5787 or (888) 649-6850
Website: ccsww.org/volunteerservices

CATHOLIC COMMUNITY SERVICES
SERVING PEOPLE OF ALL BELIEFS

Physical address: 100 23rd Ave S.
Seattle, WA 98144

COVID-19 Response: Currently only providing medical transportation. To help minimize risk of exposure, program offers groceries and meal deliveries to clients in place of trips. Mandatory face covering for riders and drivers. Social distancing of at least six feet observed.

Service Area: King County; will cross county lines if a volunteer is available. CCS programs are also offered in surrounding counties such as Snohomish and Pierce.

Service Hours: Monday through Sunday, hours flexible

Rider Eligibility:

- 60 years of age or older **or** 18-59 years old living with a disability
- Must be capable of getting into and out of vehicle without assistance
- Must live independently in own home/apartment
- Self-certify as low-income under the Department of Housing and Urban Development (HUD) guidelines (annual income of $66,700 or lower)
- Not receiving services through state programs (such as COPES)

Trip Priority: At this time, provides trips to and from medical appointments only.

How to Schedule a Ride:

- New or on-going riders can call (206) 328-5787 toll free or email VC@ccsww.org
- Ride scheduling hours: Monday through Friday, 9:00AM to 3:30PM
- To set up a trip, call at least one week in advance
- Able to set up re-occurring rides
- Unable to accommodate day-of ride requests

Payment: No charge to riders.

Eastside Easy Rider
COLLABORATIVE

PAGE | 6

EASTSIDE FRIENDS OF SENIORS

Linda Woodall
Title: Executive Director
Email: lindaw@eastsidefriendsofseniors.org
Phone: (425)-369-9120
Website: http://www.eastsidefriendsofseniors.org

Eastside Friends ♡f Seniors

Physical address: 1121 228th Avenue SE
Sammamish, WA 98075

COVID-19 Response: Provide transportation to medical appointments. Shifted from trips to grocery stores to volunteer delivery of goods requested. Beginning to resume taking riders to the store. Volunteers must disclose when they have been or plan to travel amongst crowds of people. Facial coverings required.

Service Area: Sammamish and Issaquah; serve a 20-mile radius. Flexible ride services outside of the radius if a volunteer is available.

Service Hours: Monday through Friday, 8:00AM to 8:00PM; flexible trips are possible if volunteers are available.

Rider Eligibility:

- 60 years of age or older
- Must live within designated service area
- Must be able to get in and out of vehicle without assistance
- No income eligibility requirement

Trip Priority: Medical and essential services including access to food.

How to Schedule a Ride:

- New or on-going riders call (425) 369-9120 or email info@eastsidefriendsofseniors.org
- Must be a registered rider to request a ride
- Ride scheduling hours: Monday through Friday, 9:00AM to 4:00PM
- Prefer client to call one week in advance, however, can sometimes schedule a ride with less notice
- Able to set up re-occurring rides
- Unable to accommodate day-of ride requests

Payment: No charge to riders; donations accepted.

Eastside Easy Rider
COLLABORATIVE

PAGE | 7

KAISER PERMANENTE TRANSPORTATION ASSISTANCE

Lisa Hirohata
Title: Manager, Volunteer Programs
Email: lisa.m.hirohata@kp.org
Phone: (206)-326-2815
Website: https://wa-provider.kaiserpermanente.org/

KAISER PERMANENTE.

Physical address: 601 Union St., Suite 3100
Seattle, WA 98101

COVID-19 Response: Please note this program is currently out of service due to COVID and not accepting ride requests at this time.

Service Area: All of King County; able to travel cross county lines if volunteer is available and willing.

Service Hours: Monday through Friday, 9:00AM to 4:00PM; Accepting rides for appointments starting no earlier than 10:00AM and ending by 3:00PM. Exceptions to these times if volunteer is willing and able.

Rider Eligibility:

- Must be a Kaiser Permanente member
- Must be 60 years of age or older
- Must be capable of getting in and out of vehicle without assistance
- Limited income

Trip Priority: Provides trips to and from medical appointments only.

How to Schedule a Ride:

- Please note that they are not accepting ride requests at this time.
- To schedule a ride, call transportation provider at (877) 672-2202
- Ride scheduling hours: Monday through Friday, 9:00AM to 4:00PM
- Client must call 2 weeks (14 calendars days) in advance of appointment
- Unable to accommodate day-of ride requests
- Can set up re-occurring trips, but will help client set up more permanent transportation method (ie: help with transporting dialysis patient until he or she is eligible and able to ride Access)

Payment: No charge to riders; donations accepted (will accept cash and check).

Eastside Easy Rider
COLLABORATIVE

PAGE | 8

METRO COMMUNITY VAN

Melissa Allan
Title: Transportation Planner
Email: communityvan@kingcounty.gov
Phone: (206)-625-4500
Website: kingcounty.gov/depts/programs/community-van

Community Van

Physical address:
201 S. Jackson St.
Seattle, WA 98104

COVID-19 Response: Facial coverings required, shields between driver and rider installed to prevent direct contact, and capacity reduced to a maximum of three people per vehicle.

Service Area: Community Van is available in participating cities. Currently, Community Van is in operation in Duvall, Woodinville, Bothell, Kirkland, Kenmore, Lake Forrest Park, Shoreline, Sammamish, and Vashon Island.

Service Hours: Monday through Sunday; Vans are available for use in the day, evening, and weekends, depending on volunteer driver availability.

Rider Eligibility:

- No age, ability, or income requirements
- Parental consent is required for children under the age of 13 years old to ride without an adult or legal guardian
- Services offered for ambulatory and non-ambulatory clients

Trip Priority: Currently resources, vans, and volunteer drivers are available to accommodate most trips. Trips can take place throughout King County but require at least two riders and one volunteer driver. No fixed routes and no rider eligibility required.

How to Schedule a Ride:

- The Community Van is first-come/first-serve ridesharing service and space is limited to a minimum of two passengers per van
- To request a trip or to join a pre-existing trip, clients can call or email the Community Transportation Coordinator (contact information listed below)
- Trips are pre-scheduled, and not able to accommodate day-of ride requests

Payment: Fare for the Community Van is the same as riding a Metro bus but covers your round-trip regardless of time or distance. Fare is $2.75 for adults, $1.50 for youth and people with low-incomes, $1.00 for people with disabilities or older adults, and free for children under age five. Free transfers to King County Metro buses within a 2-hour window. Rider can pay with their monthly ORCA pass, Transit Go mobile tickets, or with Human Service bus tickets.

Eastside Easy Rider
COLLABORATIVE

PAGE | 9

Current Community Van Jurisdictions:

BOTHELL/ WOODINVILLE COMMUNITY VAN

Kristi Dreessen
Title: Community Transportation Coordinator
Email: commvan@uw.edu
Phone: (425)-352-5129
Website: uwb.edu/facility/commuter-services/commuter-van

DUVALL COMMUNITY VAN

Victor Londono Quintero
Title: Community Transportation Coordinator
Email: communityvan@hopelink.org
Phone: (425)-943-6721
Website: hopelink.org/community-van

KIRKLAND/KENMORE COMMUNITY VAN

Armaghan Baghoori
Title: Community Transportation Coordinator
Email: abaghoori@kirkland.gov
Phone: (425)-587-3924
Website: kirklandwa.gov/Kirkland-Kenmore-Community-Van

SAMMAMISH COMMUNITY VAN

Rori Kirkpatrick
Title: Community Transportation Coordinator
Email: rkirkpatrick@sammamish.us
Phone: (425) 295-0646
Website: connect.sammamish.us/mobility-hub

SHORELINE/LAKE FOREST PARK COMMUNITY VAN

Victor Londono Quintero
Title: Community Transportation Coordinator
Email: communityvan@hopelink.org
Phone: (425)-943-6721
Website: hopelink.org/community-van

VASHON COMMUNITY VAN

Megan Lockhart
Title: Community Transportation Coordinator
Email: vashonvan@kingcounty.gov
Phone: (206)-263-5901
Website: kingcounty.gov/vashon-community-van

Eastside Easy Rider
COLLABORATIVE

PAGE | 10

NORTHSHORE SENIOR CENTER

Kelly Hosea
Title: Program Supervisor
Email: kellyh@mynorthshore.org
Phone: (425)-286-1059
Website: northshoreseniorcenter.org

Northshore
Senior Center

Physical address: 10201 E Riverside Drive
Bothell, WA 98011

COVID-19 Response: Offers delivery of food items from center pantry and hot meals from community dining program. If you need prescriptions to be picked up, Northshore is also able to assist.

Service Area: Runs deviated routes throughout Bothell, Kirkland, Kenmore. Serves north King County and south Snohomish County.

Service Hours: Monday through Friday, 8:00AM to 5:00PM; flexible trips are possible if volunteers are available.

Rider Eligibility:

- 60 years of age or older **or** 18-59 years old living with a disability

Trip Priority: Access to health or food related services, or activities at participating senior centers. Services include:

- Door-to-door service in the Northshore Region for access to medical appointments and grocery/food services
- Service to the Northshore Adult Day/Health & Wellness Center for scheduled appointments only
- Individual trip planning for people using transit buses
- Free transit passes to qualified individuals
- Application forms for King County Metro Access and Community Transit DART
- Information and referrals to other transportation services as appropriate

How to Schedule a Ride:

- Call (425) 286-1026 or email nscdispatch@mynorthshore.org
- Ride scheduling hours: Monday through Friday, 8:00AM to 5:00PM

Payment: No charge to riders; donations appreciated.

Eastside Easy Rider
COLLABORATIVE

PAGE | 11

SNOQUALMIE VALLEY TRANSPORTATION SENIOR RIDE PROGRAM

Amy Biggs
Title: Director, Snoqualmie Valley Transportation
Email: abiggs@svtbus.org
Phone: (425)-888-7001 Ext. 109
Website: svtbus.org

Physical address: 411 Main Avenue S
North Bend, WA 98045

COVID-19 Response: Reduced rider capacity. Facial coverings required and social distancing observed.

Service Area: Serves North Bend, Snoqualmie, Fall City, and Preston; does not travel out of King County to pick up/drop off clients.

Service Hours: Monday through Friday, 8:00AM to 5:00PM

Rider Eligibility:

- 60 years of age or older

Trip Priority: Provides trips to and from medical appointments only.

How to Schedule a Ride:

- Call the Snoqualmie Valley Transportation (SVT) office at (425) 888-7001
- Ride scheduling hours: Monday through Friday, 8:00AM to 5:00PM
- Riders are encouraged to book ride appointments one to two weeks prior to the trip
- Volunteers can wait with seniors at their appointments before driving them home, offering a helping hand and moral support

Payment: No charge to riders; donations up to $10 are accepted.

Eastside Easy Rider
COLLABORATIVE

PAGE | 12

SOUND GENERATION'S VOLUNTEER TRANSPORTATION

Suma Mondal
Title: Program Director
Email: sumam@soundgenerations.org
Phone: (206)-727-6246
Website: soundgenerations.org

Physical address: 821 2ⁿᵈ Avenue
Seattle, WA 98104

COVID-19 Response: Volunteer drivers in personal vehicles can't transport more than one client at a time. Facial coverings required.

Service Area: Medical centers within King County; does not travel out of King County to pick up/drop off clients.

Service Hours: Monday through Friday, 8:00AM to 5:00PM

Rider Eligibility:

- Must be 60 years and older
- Must be capable of getting in and out of vehicle without assistance
- Have limited transportation options
- Clients must be King County residents

Trip Priority: Provides trips to and from medical appointments only.

Scheduling a ride:

- Call (206) 448-3110 or 1-800-282-5815
- Ride scheduling hours: Monday through Friday, 8:00AM to 5:00PM
- Must call a week in advance to schedule a ride for the following week
- Unable to accommodate day-of ride requests
- Client is able to set up re-occurring trips

Payment: No charge to riders; donations accepted.

Eastside Easy Rider
COLLABORATIVE

PAGE | 13

ADDITIONAL VOLUNTEER DRIVER PROGRAMS IN KING COUNTY

The transportation programs listed below are currently operating and serving King County, however they were not involved in providing data or information to this project.

DISABLED AMERICAN VETERANS (DAV) VOLUNTEER TRANSPORTATION:

Website: www.dav.org/veterans/i-need-a-ride
Seattle VA Medical Center: (206) 762-1010

A free shuttle service to VA medical facilities for injured and ill Veterans.

NORTH EAST SEATTLE TOGETHER (NEST):

Website: https://nestseattle.org/portal/transportation/
Phone: (206) 525-6378
Email: info@nestseattle.org
Physical Address: 8008 35th Ave NE, Seattle, WA 98115

A village that provides a support network for older residents to age in place and stay engaged in their neighborhoods. Serves the neighborhoods north of the Montlake Ship Canal, south of Northgate Way and NE 110th St, west of Lake Washington, and east of Interstate 5.

MERCER ISLAND PARK AND RECREATION SENIOR TRANSPORTATION:

Website: https://www.mercerisland.gov/parksrec
Phone: (206) 236-7321
Physical Address: 2040 84th Avenue SE, Mercer Island, WA 98040

Provides transportation on Tuesdays and Thursdays for Mercer Island seniors to and from their homes and program sites.

SEATAC COMMUNITY CENTER SENIOR PROGRAM

Website: https://www.seatacwa.gov/services/senior-program
Sound Generations Hyde Shuttles: (206) 727-6262
Physical Address: 13735 24th Avenue S., SeaTac, WA 98168

Utilizes the Hyde Shuttle. Free van service for seniors age 55 and older and people with disabilities living in SeaTac and Tukwila. Ride anywhere within the city limits.

Eastside Easy Rider
COLLABORATIVE

Ride With Community Van! Flier, Hopelink Community Van

hopelink | King County METRO Community Van

Ride with Community Van!

Drive up to two hours away, any time of day, for the price of bus fare! Our program is open to everyone regardless of age, income, or ability! No application process required!

About Us

Community Van is a volunteer-driven transportation service, driven for the community by the community. Our wonderful drivers are available to take you anywhere you want to go, whether that's a trip to the grocery store, the airport, or a fun trip into the city with your family.

Please note: since we are a volunteer-driven program, we cannot guarantee a ride. If we are unable to find a volunteer for your trip, we are unfortunately unable to complete the trip.

Online trip request form

How to Ride

Submit a trip request
Submit a trip request via email, phone call, text, or online form. We require **at least two business days' notice** prior to a trip. However, we recommend a week notice for best results. We will ask for your contact information and trip details.

Wait for a Volunteer Match
We will reach out to our pool of volunteer drivers in the area to find a good match. This may take a few days as we wait for a response from our volunteers.

Ride!
We will send you a confirmation and connect you with your driver prior to your trip. You're ready to ride!

Program

Two rider minimum
- Rideshare program requires minimum 2 riders and one driver.
- Open to anyone regardless of income, age, or ability.
- No application process required.

Flexible Service
- Drive up to two hours away from starting location
- Vans are available 24/7 and can be taken all day (not overnight)

Low cost
- Riders pay standard King County Metro bus fare:
  - $2.75 for adults
  - $1.00 for seniors
  - Free for youth 18 years and under
- Pay with ORCA card, Transit GO app, or human services bus ticket.

Accessible
- 6-passenger wheelchair accessible vans with ramp
- 7-passenger and 12-passenger vans (not wheelchair accessible)
- Required accessibility training for all drivers

Contact Us

Call: 425-943-6721
Text: 833-202-3779

communityvan@hopelink.org

Borrow the Community Van! Flier, Hopelink Community Van

Customer Guidelines, WexExpress New Freedom Program, February 2018 (2 pages)

New Freedom Program

Customer Guidelines

The New Freedom volunteer driver program is a service provided by volunteers using their own vehicle. This service is primarily for seniors, persons with disabilities, veterans, and those seeking non-emergency medical transportation throughout the state of Michigan.

Guidelines for Requesting Transportation

1. Requests for rides must be made at least (3 business days) 72 hours in advance of the appointment.
2. Cancellation must be called into the office as soon as you know you will not need a ride. Our volunteers have arranged their schedules to accommodate your transportation needs, and they need to know of changes as soon as possible.
3. **Volunteers are not, under any circumstances, to be called at their homes by clients requesting transportation.** All requests must be made through the WexExpress Mobility Office or our partnering offices for insurance purposes. Please do not ask the driver to take you to an unscheduled appointment or stop.
4. Every effort will be made to provide a ride for you as requested; however, because this service is provided by volunteers, occasionally we may not be able to fill every request. **We also request that appointments be made no later than 2 PM – it is difficult to obtain drivers for appointments that require them to travel late in the day.**
5. Our mobility office operates Monday -Friday 8AM-4PM for scheduling transportation. The volunteers are available from 7AM-6PM Monday-Friday.
6. We ask that you inform us of any physical condition that may require extra assistance or if the use of any device such as a wheelchair, walker, or oxygen tank is necessary so we can provide the proper vehicle for your transport. Our volunteers can only provide minimal assistance.

Rules of the Road

1. **State law requires the use of seat belts. Our volunteer drivers must insist you wear a seatbelt.** If for some reason you cannot use a seat belt, a doctor's statement releasing you must accompany you on all trips. This is for your safety as well as the volunteer driver.
2. Transportation is for clients only. If it is necessary for a friend or family member to accompany you, we must be made aware of this when you call to request transportation.
3. All riders must be prepared to board the vehicle at the designated pick up time and location. **Volunteer drivers are directed to wait five (5) minutes before departing.** (Time is extended for customers with disabilities). If volunteer responds and receives a "No-Show," it will be documented and may result in a suspension of riding privileges.

C:\Users\Kristen\Desktop\Backup\New Freedom\Documents for training new freedom\New Freedom Documents\guidelines for clients revised.docx
Revised 02/16/18

4. **In the event of multiple cancellations or no-shows, WexExpress reserves the right to suspend transportation.**

5. All riders must be able to stand, bear weight, and enter or exit the vehicle with minimal assistance. If you are unable, please let us know, and we will try to make proper accommodations.

6. **Volunteers cannot act as the responsible party for your appointment; if the procedure requires any type of anesthesia, then you must have a person accompany you that can act as the responsible party for your appointment.**

7. Please limit your baggage. Volunteers reserve the right to deny transport of packages/objects that are unsafe or unable to be properly stored.

8. WexExpress will make every effort to serve you during adverse weather conditions. Delays and cancellations are possible.

9. Objectionable odors from any source, unavoidable by the driver or other passengers, will not be permitted.

10. Volunteers **do not allow eating, smoking, chewing tobacco, vaping, drinking, vulgar language, or playing of external audio equipment** without consent or permission.

11. Volunteers will not tolerate any type of violence, threats, intimidation, destruction of property, or insubordination. WexExpress and its partners have the right to refuse service and remove passengers when deemed necessary.

12. WexExpress demands that passengers conduct themselves in an acceptable and respectful manner at all times. Any type of lewd or indecent behavior is unacceptable. Failure to comply will result in immediate removal.

13. **No weapons, illegal drugs, hazardous materials or other dangerous-deemed items** will be permitted in the vehicle.

14. Any and all illegal behavior will be reported to law enforcement, and the customer will be permanently barred from service.

15. WexExpress has the right to temporarily or permanently ban passengers from service when necessary.

16. The privacy of our volunteer drivers must be respected.

17. **Volunteers do not accept monetary gratuity.**

Participants in the transportation assistance program agree to the guidelines set forth and agree to waive any and all claims of personal injury and/or property damage against the New Freedom Program and any of its partnering agencies, its elected and appointed officers, employees, volunteers, and agents, which may occur as a consequence of participation in or receipt of service under the transportation assistance program.

_____   _____
Customer Signature   Date

Risk Management and Insurance Resources

Section 2 - Volunteer Driver Programs offers guidance, information and resources related to the risk management and the types of insurance that a volunteer driver program will want to consider. The resources shared here are meant to serve as examples of how some programs have chosen to handle the risks associated with their individual programs. As discussed earlier in this Toolkit, it is always best to discuss any insurance issues and concerns with the organization's legal representative and a trusted insurance broker.

Included below:

- Insurance Coverage and Automobile Statement, WexExpress New Freedom Program, January 2018

- Volunteer Driver Release/Indemnification Agreement, WexExpress New Freedom Program, January 2018

Insurance Coverage and Automobile Statement, WexExpress New Freedom Program, January 2018 (2 pages)

New Freedom Program

Insurance Coverage & Automobile Statement

1. Excess Accident Medical Coverage

This coverage is in excess of any other health insurance that you have in place. The excess accident medical coverage will pay up to $50,000 for medical treatment, hospitalization and licensed nursing care required as the result of a covered accident. The insurance applies while you are traveling directly to and from, and while you are participating in, volunteer- related activities. Initial medical expenses must be incurred within 60 days of the accident. Expenses are then covered for a one-year period following the accident. See coverage details at www.cimaworld.com

2. Excess Volunteer Liability Insurance

All registered volunteers (collectively) of an organization are provided with excess volunteer liability insurance at a limit of $1,000,000 per occurrence (subject to an annual aggregate for each named organization.) This policy provides protection if you are liable for bodily injury or property damage arising out of the performance of your duties during your volunteer assignment. This coverage is in excess of and noncontributing with any other valid and collectible insurance you may have. See coverage details at www.cimaworld.com

A complete listing of the exclusions is included in the insurance policy details, which are available at www.cimaworld.com.

3. Excess Automobile Liability Insurance

This coverage provides an extra layer of protection for you as a registered volunteer driver while performing your duties. This insurance applies only after your own insurance is exhausted, or the policy's retention has been exceeded. This coverage protects you for bodily injury or property damage claims arising out of the operation of your own vehicle, during your volunteer assignment

It is important to remember that you must maintain your own auto liability coverage at least equal to the state-required minimums. Also, please remember that this coverage does not apply to any damage to your vehicle. See coverage details at www.cimaworld.com

_____(initial)   I have read and understood the insurance policies for WexExpress volunteers.

_____(Initial)   I certify that I have and will maintain automobile liability insurance at least equal to the minimum required by the State of Michigan, to cover myself and passengers whenever I use my vehicle in connection with my volunteer service.

_____(Initial)   I have provided a copy of my insurance and will maintain automobile liability insurance of at least equal to the minimum required by the State of Michigan, to cover myself and passengers whenever I use my vehicle in connection with my volunteer service.

_____(Initial)   I certify this I will have my automobility inspected by Fox Ford in Cadillac.

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I certify that I have and will maintain a valid motor vehicle driver's license, that I will maintain my vehicle in safe working condition and that I will ensure that my car complies with state seat belt requirements for those occasions when I will use my vehicle in connection with my volunteering. I understand that under no condition am I to use my vehicle in connection with my volunteering (e.g. transporting clients, doing errands, driving between client homes, driving to and from my service day etc.) without appropriate license, insurance, etc. or when my vehicle is not in safe working condition or if it doesn't comply with state seat belt requirements, I may be immediately terminated.

_____   _____
Volunteer Signature   Date

_____   _____
WexExpress - Representative   Date

Volunteer Driver Release/Indemnification Agreement, WexExpress New Freedom Program, January 2018

New Freedom Program

Volunteer Driver Release/Indemnification Agreement

The Cadillac/Wexford Transit Authority appreciates your willingness to volunteer for the volunteer driver program. Your duties and rules of your services will be explained in a handbook separately. The purpose of this document is to make sure you understand the following:

As a volunteer in the volunteer driver program, you will not be entitled to the same benefits as a Cadillac/Wexford Transit Authority employee. Therefore, you must have your own auto insurance and provide proof of that insurance.

In volunteering to be a driver in this program, you must execute the following: Release/indemnification, in which you release Cadillac/Wexford Transit Authority and its partners and each of its affiliated departments, divisions, successors, officers, employees and any and all representatives, may now have or hereafter have, and also all claims or right of action for damages which, I, my successors, agents, administrators, or any other representative have or hereafter may acquire, resulting from my participation as a volunteer in the Volunteer Driver Program.

_____ ....
Volunteer Driver Signature   Date

_____ ....
WexExpress-Representative   Date

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Organizational Policy and Procedure Resources

Section 2 - Volunteer Driver Programs/Policies and Procedures describes why policies and procedures are essential to the successful operation of volunteer driver programs. Program policies and procedures should be written and made readily available to all staff, both paid and unpaid. In some cases, it may be necessary to require that volunteers acknowledge understanding of certain policies in writing. The resources included here will be of great value in those cases.

Available on Program Website:

Ride Connection's Operation Manual

Included below:

Notice of Privacy Practices (Brochure), WexExpress New Freedom Program, January 2018

Confidentiality Agreement, WexExpress New Freedom Program, January 2018

First Aid Kit/Supply Order Form, WexExpress New Freedom Program, January 2018

Notice of Privacy Practices (Brochure Front), WexExpress New Freedom Program, January 2018

How is confidentiality most often violated?

- Client-related information is left exposed where visitors or unauthorized individuals can see it.
- Client information is discussed in a public place or with inappropriate, unauthorized individuals.
- Unauthorized people hear client-sensitive information.
- Client records are accessed for the wrong reasons or by inappropriate individuals.

Kristen Kendall

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Revised 1/29/18

wexexpress NEW FREEDOM VOLUNTEER DRIVER PROGRAM

Notice of Privacy Practices:

HIPAA Regulations

Enclosed you will find answers to:

- What is HIPAA?
- How does HIPAA protect client rights?
- What information does HIPAA cover?
- What are client rights and confidentiality?
- What are volunteers required to do?
- How is client confidentiality violated?
- How can volunteers make a difference?

Notice of Privacy Practices (Brochure Back), WexExpress New Freedom Program, January 2018

What is HIPAA?

HIPAA is the Health Insurance Portability and Accountability Act of 1996.

Congress passed the law to standardize medical record information and reduce the administrative costs of health care providers and other related businesses, including those like Cadillac/Wexford Transit Authority. It also outlines procedures for protecting clients' privacy rights.

What information does HIPAA cover?

The privacy law covers ALL communications regarding patients, written, electronic, oral, and ANY others.

That means that CWTA volunteers need to be mindful of all information that is written, computerized, transmitted, faxed, mailed and spoken.

What are client rights and confidentiality?

Rights: A person's right to control their protected health information is based on their right to control the health care itself.

Confidentiality: The services that WexExpress volunteers perform for clients are not anyone else's business.

How does HIPAA protect client rights?

• **It creates national standards** to protect individuals' medical records and other personal health information.

• **It set boundaries** on the use and release of health records and information.

• **It standardized codes** used to send client health information.

• **It establishes civil penalties** that hold violators accountable.

What are volunteers required to do?

Awareness: Ask the WexExpress staff to explain any HIPAA privacy procedures that are unclear.

Security: Keep all client records and information containing personally identifiable health information (PHI) confidential.

How can volunteers make a difference?

• By protecting and ensuring clients' rights. Respect the individual and his or her right to privacy.

What else can volunteers do to help?

• By limiting access to clients' health information.

• By disclosing information only to those who are rightfully entitled and those with a need to know so they can carry out their volunteer duties.

• If you have to discuss a client's condition (with appropriate individuals) in public areas, speak quietly.

• Avoid using clients' names in hallways, offices and other public areas.

• If you must discuss a clients' confidential information, note when the information was requested and to whom it was disclosed.

• Should you need to fax client information, verify all fax numbers first. Always use a fax cover sheet stating that the information is confidential.

• Take precautions to prevent inadvertent disclosures.

• Review the way you handle confidential client information to ensure that you are following these guidelines.

Confidentiality Agreement, WexExpress New Freedom Program, January 2018

wexexpress
New Freedom Program

Confidentiality Agreement

As a volunteer driver for the WexExpress New Freedom Program, I hereby agree to protect the confidentiality of all clients served by this program. I agree to keep client's names, information, and places of transport and/or any information learned about clients while involved with transportation confidential. I understand that any breech or violation of this confidentiality code will result in reprimand or loss of my volunteer driver status.

_____   _____
Volunteer Driver Signature   Date

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First Aid Kit/Supply Order Form, WexExpress New Freedom Program, January 2018

wexexpress
New Freedom Program

First Aid Kit/Supply Order Form

First Aid Kit - Driver _____

What You'll Find Inside: Please fill out this order form by placing an X in the box and put the number needed in the black provided, when you are in need of supplies.

☐ Abdominal bandage (1)
☐ Adhesive bandage, extra large (5) _____
☐ Adhesive bandage, standard size (25)_____
☐ Adhesive bandage, for knuckles (4) _____
☐ Adhesive bandage, for fingertips (4) _____
☐ Alcohol prep pads (10) _____
☐ Povidone-Iodine prep pad (5) _____
☐ Antiseptic cleansing wipes (6) _____
☐ Butterfly closure strips (6) _____
☐ Compass (1)
☐ Cold compress, disposable (1)
☐ Cotton tip applicator (10) _____
☐ CPR facemask (1)
☐ Emergency blanket (1)

☐ Elastic conforming bandage 5cm X 3.6m (1)
☐ First aid tape (1)
☐ Gauze pad, sterile (3) _____
☐ Glow Stick
☐ Metal tweezers (1)
☐ Moleskin blister relief pad (1)
☐ Poncho, disposable (1)
☐ Razor blade (1)
☐ Rescue whistle (1)
☐ Sewing kit (1)
☐ Safety pins (4) _____
☐ Scissors (1)
☐ Triangular bandages (1)
☐ Vinyl gloves, disposable (6) _____

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Transportation Plans and Trip Logs

Transport verifications and transport plans are necessary for accurate reporting.

Included below:

- Transport Verification (form), WexExpress New Freedom Program, 2023
- Transportation Plan (form), WexExpress New Freedom Program, 2018

Transport Verification (form), WexExpress New Freedom Program, 2023

Add header

wexexpress

Transport Verification

Date _____
Driver's Name _____
RTV/NF Vehicle # _____
Support Agency _____

Name of Rider	From (Current Address)	Time	Odometer Start	To (Destination Address)	Time	Odometer End	Total Miles

Total Miles _____
Total Passengers _____

I hereby certify the account of travel is accurate.

Driver's Signature _____

Date _____

Meal cost (over 4 hr trip); attach receipt $. _____

Customer Signature _____

Date _____

Trip Verification Report 2023

Revised 3/23

Transportation Plan (form), WexExpress New Freedom Program, 2018

New Freedom Program
Transportation Plan

Passenger Information

First and last name_____

Address_____

City _____   State__MI___   Zip code_____

Home phone (____)_____   Cell phone (____)_____

Emergency contact _____   Phone (____)_____

Are you able to provide payment   ☐ Yes   ☐ No _____
Have you ridden with us before?   ☐ Yes   ☐ No
Are you over 60 years old   ☐ Yes   ☐ No_____
Are you a Veteran?   ☐ Yes   ☐ No

Transportation request

Medical   Dental   Vision   Therapy   Other_____

Date of trip_____   Pick up time _____   Appt. time _____

Pick up location _____   Appt. Length _____Total Trip time _____

Address _____City_____State _MI_ Zip code_____

Destination_____

Address _____

City _____State _MI_   Zip code _____

Special instructions/directions/mobility needs _____

_____

_____

# of additional passengers _____   (Circle one)   Personal attendant   family member   Friend

OFFICE USE   Approximate miles _____
☐Contact Date: _____   Received by: _____   Return Call _____
☐ COA Wexford   ☐ Veterans   ☐ AAA   ☐ CWTA   ☐ Other_____
Approved by: _____   Date _____
☐ COA Wexford   ☐ Veterans   ☐ AAA   ☐ CWTA   ☐ Other_____
Volunteer Driver: _____   Vehicle _____Scheduled☐ Paperwork☐
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Training Materials

Volunteer driver programs and sponsoring organizations must have a plan for training volunteer drivers. A checklist, like the one used by WexExpress New Freedom, will be helpful.

Included below:

- Training Information (form), WexExpress New Freedom Program, 2018

Training Information (form), WexExpress New Freedom Program, 2018

New Freedom Program

Training Information

1. Fill out and collect additional paperwork
   a. Application
   b. background check
   c. Motor vehicle check
   d. driver's license
   e. insurance card
   f. vehicle registration.
2. Volunteer driver information
   a. Volunteer guidelines
   b. Information about vehicle safety checks
   c. Indemnification statement
   d. Limits on assisting passengers
3. Insurance information
   a. CIMA-excess automobile insurance
4. Customer information
   a. HIPAA – confidentiality statement
   b. Transporting oxygen tanks
   c. Limits on assisting passengers
5. Volunteer online training- CTAA
6. Scheduling a trip
   a. Transportation plan
   b. drop off/pickup how to contact about potential trips. (email, phone, text, mail, pick up.)
   c. maps will be provided.
7. Filling out mileage report
   a. Signature of customer on documents.
   b. Agent cashier report
   c. Meal policy
8. First Aid kits
   a. Replenish form
   b. Other materials
9. Shirt order
   a. Size _____
   b. Color _____

_____   _____
Volunteer Driver Signature   Date

_____   _____
WexExpress – Representative   Date

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Section 8 – Forms (Examples and Templates), Policies, and Procedures

The forms (examples and templates), policies, and procedures included in this section are updated versions of those included in the original Washington State Volunteer Program Guidebook (2013). They are composites of similar forms, policies, and procedures used by many of the contributing programs. Many of the examples use Washington State references (and links to websites). Review the examples but use what works best for your program.

Each volunteer driver program is advised to carefully read all elements in individual forms, policies, and procedures and edit to reflect its state and local policies and practices.

The items in red should be customized for the program and its own local policies. The term "sponsoring organization" has been used uniformly so that users can easily search and replace that name with the name of their program. The items in blue are additional notes and instructions related to customizing a template. Please make sure to delete these comments in the final policy document.

The materials can be freely downloaded and edited; however, forms and policies should always be reviewed by your legal counsel to ensure compliance with state and local laws and for liability purposes. This caveat particularly applies to the policy examples, such as confidentiality.

Please Note: The FBI Records Request form is a sample. The official form from the FBI must be used to submit a formal records request to the FBI.

In addition to the resources included here, users are encouraged to review the examples gathered from the case studies. See *Appendix to Section 7 – Case Studies and Methodologies*.

Policies and Procedures

- Abuse, Neglect, Abandonment, and Exploitation
- Bloodborne Pathogen Exposure Control Plan
- Child/Adult Abuse Record of Search Guidelines
- Code of Ethics
- Confidentiality Policy
- Disqualifying Crimes
- Donation and Contribution Request Policies
- Driver Code of Conduct
- Driver Job Description - Personally Owned Vehicle (POV)
- Driver Orientation

- Drug Free Workplace Policy
- Driver Selection Guidelines
- Driver Selection Standards
- Essential Driver Functions
- Harassment Policy
- Health/Social Services Training Content
- Liability, Standards, and Indemnification
- Meal and Incidental Expenses Reimbursement Policies
- Rider Grievance Procedure
- Training Standards
- Volunteer Transportation Release Form
- Waivers, Agreements to Participate, and Hold Harmless

Sample Forms (Templates)
- Adult Protective Services Reporting
- Back-up Plan for Daily Operations with Sample Emergency Card
- Back-up Plan for Vehicle Loans or Out-of-Area Service
- Volunteer Driver Availability
- Driver Evaluation
- Driver Medical/Physical Release
- Driver Reference Form
- Driver Road Test
- Driver Statement of Medical Condition
- Driver Statement of Understanding
- Driver Training Checklist
- Exit Interview
- Exposure Incident Report
- FBI Fingerprint Form (Sample)
- Incident and Collision Report
- Incident Report - Volunteer Driver
- Lift Operation Procedures and Checklist
- Personnel Checklist
- Pre-Trip Inspection and Checklist
- Pre-Trip Inspection Form
- Private Vehicle Registration

- Rider Registration/Trip Request
- Transportation Request
- Trip Description
- Trip Voucher
- Volunteer Driver Job Application
- Volunteer Transportation Program Client Survey

Policies and Procedures

Adult - Abuse, Neglect, Abandonment, & Exploitation
(Washington State Example)

It is important not to try to investigate on your own, but to report your concerns immediately to the office of the State Department of Social & Health Services that is responsible for Adult Protective Services. They will investigate and take action to prevent, correct, or remedy the situation, with the consent of the older person involved. The staff member (including volunteers) shall also report concerns to their supervisor to receive further instructions as needed. People in certain professions are mandated to report suspected abuse, neglect, exploitation or abandonment of persons sixty years of age or older who have a functional, mental, or physical inability to care for or protect themselves. Those mandated to report include:

- Police officers
- Social workers
- Employees* of welfare, mental health, or health agencies, or congregate care long term care facilities
- Licensed health care providers
- Employees of the Dept. of Social & Health Services
- Employees of social service agencies

*Note: Employees includes volunteers.

Persons who are required to report must call Adult Protective Services immediately, and follow up with a written report within ten (10) days.

Abuse and neglect of older persons includes several categories of acts and/or omissions generally referred to as abuse, neglect, exploitation, and abandonment. Signs of potential abuse or neglect include:

- An elderly person with bruises, welts or burns or evidence of physical restraints.
- An elderly person who appears over-or under-medicated.
- An elderly person with inadequate food or water, or with unclean clothes of bedding.
- An elderly person whose caregiver abuses alcohol or is emotionally unstable.
- An elderly person who previously has had excellent credit or resources but now seems unable to meet expenses.
- An elderly person whose caregiver is under severe stress such as illness, unemployment or family problems
- An elderly person living in a family with a history of violence such as child or spouse abuse.
- An elderly person who is not permitted visitors or direct, private communications with others.

Definitions:

Abuse: An act of physical or mental mistreatment or injury that harms or threatens a person through action or inaction by another individual. Abuse may be physical, sexual, verbal, or emotional. "Medical" abuse refers to over medication or withholding of medications or other needed assistance in order to control the older person.

Signs of abuse:

1. Suspicious bruising or other injuries to arms, face, or head.
2. Marks from tying or other restraints.
3. Purposeful isolation.
4. Unwarranted sedation.
5. Withholding of food, water, or medication (without consent).
6. Unexplained depression or anxiety.

Neglect: A pattern of conduct resulting in deprivation of care necessary to maintain minimum physical and mental health. Neglect occurs when; a caregiver does not provide enough care and support to meet the person's individual needs for physical emotional well-being. (The situation may be "self-neglect" when the needs of an older person are not being met, but there is not an identified caregiver.)

Signs of neglect:

1. Inadequate food or water.
2. Uncleanliness.
3. Serious bedsores.
4. Social isolation.
5. Lack of proper medical or dental care or equipment.
6. Unsanitary conditions.
7. Unpaid bills.
8. Untreated mental illness.

Exploitation: Illegal or improper use of a vulnerable adult or that adult's resources for another person's profit or advantage. Exploitation may involve obtaining access to and misusing an older person's income, financial resources or real property, obtaining money fraudulently, charging for services riot provided, misuse of a Power of Attorney, and emotional pressure to change a will sign over property.

Signs of exploitation:

1. Sudden change in an older person's spending habits.
2. Unexplained loss of resources or valuables.
3. Overdrawn accounts.
4. Loss checks or passbooks.
5. Unusual or suspicious withdrawals from bank.
6. An unfit person moving in.

7. Sudden quit-claim deeds of property.
8. Suspicious or unauthorized use of an older person's credit cards.

Abandonment: Leaving a vulnerable adult without the means to obtain food, clothing, shelter, or health care. This form of abuse involves a recognized caregiver who has been giving regular and substantial care to an older person, and willfully discontinues the care without assuring adequate replacement or giving appropriate notice to responsible parties.

Signs of abandonment:

1. Sudden departure of caregiver.
2. No movement in or around an older person's home.
3. No answer to telephone.
4. Uncollected mail or newspapers piling up.
5. Older person suddenly discontinuing routine social contacts.

I have reviewed and understand __(insert name of sponsoring organization)__'s Policy regarding the reporting of abuse, neglect, exploitation, and abandonment of adults.

Signed: _____ Date: _____

BLOODBORNE PATHOGEN EXPOSURE CONTROL PLAN (Example)

POLICY

The policy of __(insert name of sponsoring organization)__ is to comply with all statutory obligations and to apply all known and reasonable procedures to prevent the exposure of its employees and volunteers to potentially infectious materials.

BACKGROUND

The mission of __(insert name of sponsoring organization)__ is to provide safe, courteous, reliable transportation services to the people within our service area. In fulfilling this mission our employees and volunteers and volunteers may be exposed to body fluids, such as blood or other potentially infectious materials. While their risk of exposure is minimal, it is important for all employees and volunteers to have current information about bloodborne diseases, their methods of transmission, and preventive measures which will reduce risk of exposure. Because of their assignments, __(insert name of sponsoring organization)__'s employees and volunteers are at different levels exposure risk. Therefore, this Exposure Control Plan contains general requirements that pertain to all employees and volunteers and specific requirements that pertain only to the employees and volunteers in that department.

PURPOSE

The purpose of this Exposure Control Plan is to:

1. Increase employee awareness and understanding of the bloodborne diseases, Human Immunodeficiency Virus (HIV) and Hepatitis B Virus (HBV).
2. Instruct employees and volunteers concerning the transmission of HIV and HBV.
3. Alleviate employee fears associated with HIV and HBV.
4. Reduce employee risk of exposure to infection through the implementation of engineering and work practice controls and the provision of personal protective equipment.

RESPONSIBILITY

__(insert name of sponsoring organization)__ has the responsibility to develop a formal infection control program "tailored to the needs of the particular operation and to the type of hazards involved." This includes the following elements:

1. Training about bloodborne pathogen diseases and universal precautions.
2. Offering HBV vaccinations for those employees and volunteers identified as at risk.
3. Providing the proper equipment.

At-risk employees and volunteers are responsible for adopting behaviors at work that prevent or reduce their risk of exposure. These behaviors include following procedures and using appropriate equipment as described under the Universal Precautions section of this plan.

CLASSIFICATION OF WORK

__(insert name of sponsoring organization)__ will provide an opportunity for all of its employees and volunteers to receive training about bloodborne pathogen diseases and precautions that can reduce their risk of exposure. However, this plan applies to those employees and volunteers who in the course of their assigned duties have a "reasonably anticipated potential for exposure to blood and/or other potentially infectious materials." A review of all positions at __(insert name of sponsoring organization)__ identified the following job classifications as having a risk of exposure for all employees and volunteers in these classifications:

- Drivers
- Dispatchers
- Maintenance personnel

TRAINING

__(insert name of sponsoring organization)__ will train all employees and volunteers who have been identified as having an occupational risk of exposure in the provisions of this standard, the bloodborne diseases, and the universal precautions established for their particular job assignments. This training will take place within 1 month of assignment to tasks where occupational exposure may take place and at least annually thereafter.

__(insert name of sponsoring organization)__ will make training available to all employees and volunteers regarding bloodborne pathogens and universal precautions. For some job descriptions this training will be included in the established position training.

INFECTION CONTROL PROCEDURES

1. Medical Abatement
   __(insert name of sponsoring organization)__ will offer the Hepatitis B vaccination series without charge to all employees and volunteers in positions identified as having a risk of exposure within 1 month of their initial assignment to that position. Employees and volunteers may obtain the vaccination series through the (Name of Health District). Each affected employee must complete and sign a Hepatitis B Vaccination Decision Form. A copy of this form will be placed on file with the appropriate safety program manager and in the employee's medical record file.

2. Universal Precautions
   Universal precautions is a system of infectious disease control that assumes that every direct contact with body fluids is infectious and requires every employee exposed to direct contact with body fluids to be protected as though the fluids were HIV or HBV infected. __(insert name of sponsoring organization)__ employees and volunteers will follow established engineering and work practice controls and use appropriate personal protective equipment to prevent contact with blood or other potentially infectious materials. Under circumstances in which differentiation between body fluids types is difficult or impossible, all body fluids shall be considered potentially infectious materials.

PATHOGEN EXPOSURE CONTROL PLAN - UNIVERSAL PRECAUTION PROCEDURES (Methods of Control)

DRIVERS

1. Personal Protective Equipment

   a. __(insert name of sponsoring organization)__ will equip vehicles with paper towels and first aid kits which have latex or vinyl gloves, one way valve mouthpieces, tongs, sharps containers and disinfectant materials.

2. Collection and Disposal Practices

   a. Drivers who discover syringes or other items that may be contaminated with potentially infectious material shall notify dispatch. Trained personnel, wearing gloves, will remove the item and place any needles or like items in a sharps container.
   b. If body fluids are spilled on a van, Drivers shall notify the manager and request instructions. Cleanup of these body fluids will be done by personnel trained in universal precaution methods.
   c. Laundry such a blankets, clothing, cleaning materials, etc. that is overtly contaminated with blood or body fluids, shall be double-bagged in red plastic bags, or in a bag labeled "biohazard" and treated with bleach. These bags can be thrown in secure dumpsters. If an employee's clothing and check with a supervisor regarding the treatment or disposal of the items.
   d. In the case of an accident involving injury(ies), if employees or volunteers choose to provide initial first aid, they should follow universal precaution procedures including wearing gloves and using a one-way valve mouth piece.

MAINTENANCE

1. Personal Protective Equipment
   __(insert name of sponsoring organization)__ will provide the following: utility gloves, face shields, eye protection, grabbers or tongs, sharps disposal containers, and red plastic garbage bags.

   a. Gloves - __(insert name of sponsoring organization)__ will provide latex or vinyl gloves. Employees and volunteers will ensure gloves have no holes or discoloration prior to use and shall always have an extra pair. Gloves shall be worn when the employee has the potential for the hands to have direct skin contact with infectious waste, or while handling items or surfaces soiled with blood or other potentially infectious materials. Disposable gloves shall not be reused. Utility gloves may be washed for reuse. Any gloves will be thrown away if punctured or torn. While wearing gloves, employees and volunteers should not handle any personal items such as combs, wallets, pens and should avoid touching their faces or eyes.
   b. Band-Aids - Employees and volunteers will cover any open cuts, sores, abrasions, chapping, or wounds on their skin with a bandage or Band-Aids. (Particularly important for chapped hands, dermatitis).

    c. Face shields/eye protection - Masks, eye protection or chin-length face shields shall be worn whenever eyes, nose, or mouth might be splashed by body fluids or cleaning solution.

    d. Grabbers/tongs - As much as possible, employees and volunteers shall use "grabbers" or tongs and gloves to pick up potentially infectious materials. Gloves must be worn before picking up these materials and where feasible, grabbers, shovels, rakes, or other tools will be used to pick up materials (such as piles of leaves or trash) that may contain unknown objects.

    e. Paper towels - Used to clean up potentially infectious matter.

    f. Red Bags - Put all disposable (non-sharps) contaminated, or possibly contaminated, waste in red bags.

    g. Sharps Containers - Put all sharp objects, i.e., broken glass, needles, small sharp steel, into sharps container. DO NOT RE-CAP NEEDLES!!!

    h. Employees and volunteers must wear gloves while cleaning equipment which may have been exposed to potentially infectious body fluids. After cleaning equipment, employees and volunteers should discard gloves.

2. Collection and Disposal Practices

    a. Needles - Hold discarded hypodermic needles by the barrel and place needle- down in the rigid, leak and puncture-proof sharps containers provided by the Agency. DO NOT EVER re-cap, break, bend, or dismantle a needle or syringe unit.
Cap the sharps container when it is between one-half and three-quarters full. The container will be sealed, labeled, and stored as hazardous material. DO NOT dispose of in garbage cans or in the dumpster. Sharps containers will be disposed of by the program manager when quantities warrant.

    b. Condoms - May be thrown in the red bag.

    c. In the case of an accident involving injuries, tow truck crew members and other maintenance employees servicing the vehicle at the site will avoid contact and wear protective equipment where there is the possibility that the vehicles involved may be contaminated with body fluids. Maintenance personnel should contact a Maintenance supervisor if they suspect human debris has contaminated the vehicle(s). The Supervisor will contact County Police if needed.

    d. Employees and volunteers shall not use any body part such as feet, hands, etc., to compact trash.

    e. Feces/blood/vomit -DO NOT place human or animal feces in the trash. Disposal options are:
        i. Flush it down a toilet that is part of the sanitary sewer system.
        ii. Animal feces may be buried on site.
        iii. Human feces/blood/vomit may be washed down a drain that is part of the combined sanitary system, i.e., it winds up in the treatment plant. It is not acceptable to wash it into a storm drain as this is in direct violation of State and Federal codes.

    f. Laundry such as blankets, clothing, cleaning materials, etc. that is overtly contaminated with blood or body fluids, shall be double-bagged in red plastic bags, or in a bag labeled "biohazard" and treated with bleach. These bags

can be thrown in secure dumpsters. If an employee's clothing becomes contaminated, the employee shall change out of the contaminated clothing and check with a supervisor regarding the treatment or disposal of the items.

3. Personal Protection Procedures

    a. Gloves worn during contact with potentially infectious body fluids shall be removed in the following manner:
        i.   With the right hand, pinch the palm of the left glove and pull left glove down and off your fingers. Form left glove into a ball and hold it in the fist of your right hand.
        ii. Insert two fingers of left hand under the inside rim of your right glove on the palm side.
        iii. Push glove inside out down onto your fingers and over balled left glove.
        iv. Grasp gloves, which are inside out and together - with your left hand and remove them from your right hand
        v.   Discard gloves.

    b. After removing gloves WASH HANDS!!! Employees and volunteers shall wash their hands with soap and water immediately or as soon as possible after working with blood or other potentially infectious materials. Proper hand washing requires the use of soap and vigorous scrubbing for approximately 5 seconds, followed by 5 seconds of rinsing. Remember fingernails when washing hands.

    c. Employees and volunteers will follow normal hygiene practices, including washing of their hands at regular intervals throughout the day and especially before eating, drinking, smoking, applying cosmetics or lip balm, handling contact lenses, or putting anything in the mouth during the day, if they have been working in an area where there is potential for occupational exposure. Commercially packaged moistened towelettes are an acceptable alternative when soap and water are not available.

    d. If eyes are exposed, flush for 5 minutes with clean water.

POST-EXPOSURE PROCEDURES

1. Any employee who experiences a needle stick; splash of blood or body fluids to the eyes, nose, mouth, open wounds, or to chapped, abraded, or otherwise damaged skin; or human bite with broken skin shall:

2. Wash the affected area as quickly as possible with soap and water or cleaners to reduce contamination; or flush with water if the eye is affected.

3. Immediately notify their supervisor. Both will treat the exposure as an industrial injury and will follow those procedures.

4. The incident report for bloodborne pathogen exposure will contain the following elements:

5. Documentation of the route(s) of exposure, and circumstances under which exposure incident occurred;

6. The employee will then follow these procedures:

    a. Seek medical attention, no later than 24 hours after exposure.

    b. Follow the physician's recommendations regarding possible Hepatitis B vaccination, Hepatitis B Immune Globulin (HBIG) injection, and follow-up treatment.

    c. Report and week medical care for any acute illness that occurs within 12 weeks after the exposure, especially one characterized by fever, rash, or disease of the lymph nodes.

    d. The physician shall collect blood from the exposed employee as soon as possible after the exposure incident for the determination of HBV/HIV status. Actual testing may be done at that time or a later date if the employee so requests. Results are confidential, and are released only to the person tested. Confidentiality of the results are waived if the employee files a subsequent insurance disability claim.

7. An employee who tests negative for HBV/HIV should be retested at 6 weeks, 12 weeks, and 6 months after exposure to determine whether transmission has occurred.

8. If the employee or volunteer refuses to submit to #1 and 2 above, they will be required to complete a Hepatitis B Vaccination decision form indicating the decision to decline the vaccinations.

9. The appropriate manager must be notified when an exposure occurs.

IMMUNIZATIONS

__(insert name of sponsoring organization)__ will offer the Hepatitis B vaccination series to all employees and volunteers who have been identified as having risk of exposure. All employees and volunteers in these positions must complete a "Hepatitis B Vaccination Decision Form" that will be kept in the employees and volunteers' medical records files. In addition, a copy will be kept on file with the appropriate safety personnel.

RECORDKEEPING

__(insert name of sponsoring organization)__ will establish and maintain an accurate record of each occupational incident. As required by the OSHA standard, this record will include:

1. The name and social security number of the employee.

2. A copy of the employee's HBV vaccinations and any medical records relative to the employee's or volunteer's ability to receive vaccination.

3. A copy of all results of examinations, medical testing, and follow-up procedures.

4. The employer's copy of the healthcare professional's written opinion. A copy of the information provided to the healthcare professional.

__(insert name of sponsoring organization)__ ensures that such records will be kept confidential and will not be disclosed or reported without the employee's or volunteer's

express written consent to any person within or outside the workplace except as required by the standard, or law.

__(insert name of sponsoring organization)__ also will maintain a record of all training related to this standard. This record will include:

1. The dates of the training sessions.

2. The contents or a summary of the training sessions.

3. The names and qualifications of persons conducting the training.

4. The names and job titles of all persons attending the training sessions.

GLOSSARY

1. Bloodborne Pathogens - pathogenic microorganisms that are present in human blood and can cause disease in humans; include, but are not limited to, hepatitis B virus (HBV) and human immunodeficiency virus (HIV).

2. Collateral exposure risk - potential skin, eye, mucous membrane, or parenteral contact with blood or other potentially infectious materials that may result from situations in which they are placed because of their positions within the organization.

3. Exposure Incident -a specific eye, mouth, other mucous membrane, or parenteral contact with blood or other potentially infectious materials that may result from situations in which they are placed because of their positions within the organization.

4. Occupational Exposure - reasonably anticipated skin, eye, mucous membrane, or parenteral contact with blood or other potentially infectious materials that may result from the performance of an employee's duties.

5. Other Potentially Infectious Materials - Include:

    a. Human body fluids: semen, vaginal secretions, cerebrospinal fluid, synovial fluid, pericardial fluid, peritoneal fluid, amniotic fluid, any body fluid visibly contaminated with blood, and all body fluids in situations where it is difficult or impossible to differentiate between body fluids;

    b. Any unfixed tissue or organ (other than intact skin) from a human (living or dead).

6. Sharps - any object that can penetrate the skin including, but not limited to, needles, broken glass, and wires.

SUMMARY

This Exposure Control Plan contains the framework through which __(insert name of sponsoring organization)__ addresses bloodborne pathogen safety issues. Procedures specific to each Department are contained within their safety and training documents and materials. This plan will be reviewed and updated annually or whenever new tasks and procedures affect occupational exposure. It will be made accessible to employees and volunteers.

Child/Adult Abuse Record Search Guidelines
(Washington State Example)

Refer to Revised Code of Washington (RCW) [*43.43.830-43.43.845*] for complete and current information. Child/Adult Abuse Background checks may be conducted only by Washington State business, organizations or individuals, all other states must conduct searches under the Criminal Records Privacy Act.

1. *Searches can be conducted only on prospective employees, volunteers or adoptive parents. (For current employees or volunteers, see note below.)*
   Background checks can be requested on **prospective employees, volunteers or adoptive parents** who will or may have unsupervised access to children under sixteen years of age, developmentally disabled persons, or vulnerable adults. The background check is for **initial employment or engagement decisions only**.

2. *Applicants must be notified an inquiry may be made.*
   A business or organization shall not make an inquiry to the [Washington State Patrol] unless the business or organization has **notified the applicant,** who has been offered a position as an employee or volunteer, **an inquiry may be made**.

3. *A signed disclosure statement is required from applicant before a search is conducted.*
   A business or organization **shall require each applicant to disclose** to the business or organization whether the applicant has been:

   a. convicted of any crime against children or other persons;

   b. convicted of crimes relating to financial exploitation if the victim was a vulnerable adult;

   c. convicted of crimes related to drugs as defined in [RCW 43.43.830];

   d. found in any dependency action under [RCW 13.34.040] to have sexually assaulted or exploited any minor or to have physically abused any minor;

   e. found by a court in a domestic relations proceeding under [Title 26 RCW] to have sexually abused or exploited any minor or to have physically abused any minor;

   f. found in any disciplinary board final decision to have sexually or physically abused or exploited any minor or developmentally disabled person or to have abused or financially exploited any vulnerable adult;

   g. found by a court in a protection proceeding under chapter [RCW 74.34], to have abused or financially exploited a vulnerable adult.

The disclosure shall be made in writing, signed by the applicant, and sworn under penalty of perjury. The disclosure sheet shall specify all crimes against children or other persons, all crimes relating to drugs, and all crimes relating to financial exploitation as defined in [RCW 43.43.830] in which the victim was a vulnerable adult.

4. *Applicants must be notified of the response.*

   The requesting agency shall notify the applicant of the state patrol's response within ten days after receipt. The employer shall provide a copy of the response to the applicant and shall notify the applicant of such availability.

Notes:

- The business or organization shall use this record only in making the initial employment or engagement decision. Further dissemination or use of the record is prohibited. A business or organization violating this subsection is subject to a civil action for damages.

- Background checks pursuant to the Child and Adult Abuse Information Act do not expire and therefore should not be conducted routinely.

- Background checks on current employees or volunteers should be done through the Criminal Records Privacy Act, [RCW 10.97].

- Responses are limited to [Washington State records] only.

Code of Ethics (Washington State Example)

This code of ethics governs the performance of __(insert name of sponsoring organization)__'s officers, employees, board members, volunteers, and agents, (representatives) engaged in the administration of contracts supported by Federal assistance. Any employee in violation of these policies is subject to disciplinary action as outlined in the Employee Handbook. Any officer or board member who violates these policies will be subject to disciplinary action as determined by a majority vote of the Board of Directors. Any volunteer who violates these policies will be subject to disciplinary action as determined by the manager of the program in which the person volunteers.

1. **Gifts:** Representatives shall not accept gratuities, favors, gifts, or anything of monetary value (over $5.00) from present or potential contractors or sub-recipients.

2. **Personal Conflict of Interest:** Representatives who participate in the selection, award, or administration of a contract supported by Federal funds are prohibited from a real or apparent conflict of interest. Such a conflict would arise when any of the parties below has a financial or other interest in the entity selected:

    a. a __(insert name of sponsoring organization)__ representative;

    b. any member of the representative's immediate family;

    c. the representative's partner;

    d. an organization that employs, or is about to employ, any of the above.

3. **Organizational Conflict of Interest:** __(insert name of sponsoring organization)__ is prohibited from real or apparent organizational conflicts of interest. Such a conflict when the nature of the work to be performed under a proposed third party contract may, without some restrictions on future activities, result in an unfair competitive advantage to the third party contractor or impair its objectivity in performing the contract.

4. **Bonus or Commission:** __(insert name of sponsoring organization)__ affirms that it has not paid, and agrees not to pay, any bonus or commission for the purpose of obtaining approval of its application for Federal financial assistance

5. **Restrictions on Lobbying:** __(insert name of sponsoring organization)__ agrees to comply with the provisions of 31 USC 1352, which prohibits the use of Federal funds for lobbying any official or employee of any Federal agency, or member or employee of Congress. In addition, even though no Federal funds are use, __(insert name of sponsoring organization)__ agrees to disclose any lobbying of any of any official or employee of any Federal agency, or member or employee of Congress in connection with Federal assistance and to comply with USDOT regulations "New Restriction on Lobbying," 49 CFR Part 20.

6. **Employee Political Activity:** The terms of the "Hatch Act," 5 USC Section 1501 through 1508, and office of Personnel Management regulations, "Political Activity of

State or Local Officers or Employees," 5 CFR Part 151, apply to supervisory employees of __(insert name of sponsoring organization)__.

7. **False or Fraudulent Statements or Claims:** __(insert name of sponsoring organization)__ acknowledges that it will not make a false, fictitious, or fraudulent claim, statement, submission or certification in conjunction with any program supported by Federal assistance. __(insert name of sponsoring organization)__ is aware that Federal penalties could be imposed for making a false, fictitious, or fraudulent claim, statement, submission or certification in conjunction with any program supported by Federal assistance.

My signature below acknowledges understanding of __(insert name of sponsoring organization)__'s Code of Ethics:

Signature: _____ Date: _____

Confidentiality Policy (Washington State Example)

The principal of confidentiality is basic to the maintenance of professional ethics and community respect. All staff and volunteers of __(insert name of sponsoring organization)__ have a set of ethical responsibilities by which they are bound to the rider, the community, and themselves. __(insert name of sponsoring organization)__ riders act in good faith, expecting their circumstances and personal matters to remain confidential and __(insert name of sponsoring organization)__ is obligated by law and ethics to reciprocate. Confidentiality of rider information is maintained for the protection of the rider and for __(insert name of sponsoring organization)__.

Staff members, including volunteers, will use the following procedures. For the purposes of these procedures a "rider" is defined as a person registered as a program participant. Registration is accomplished by completion of a Rider Information Form (RIF).

1. All staff members will take responsibility for protecting the confidentiality of all riders. New staff members will receive instruction in these confidentiality procedures.

2. All written and unwritten information concerning riders of __(insert name of sponsoring organization)__ are considered as confidential.

3. All written information regarding the riders of __(insert name of sponsoring organization)__ will be maintained in files. Only those staff members with a "need to know" will have access to these files. No staff member may remove rider files from the office without authorization from the staff member's supervisor.

4. When it is necessary for a member of the staff to communicate information about a rider to another person or agency, a Release of Information Form will be signed by the rider or their legal representative. The signed release will be kept in the rider's permanent record. If the rider is unable to give written consent then the staff member releasing the information will document the circumstances.

5. When rider-related materials, i.e., lists, log and files are used outside the office, staff members are responsible and must take appropriate steps to safeguard the materials.

6. In emergency situations, when it is not possible to have a form signed, a verbal release may be given by the rider or their legal representative. The staff member who receives the verbal release will make a note in the rider's file and will obtain the written release as soon as possible.

7. A signed release may not be needed when the information is used for specific purposes. [DSHS Notice of Privacy Practices for Client Medical Information (November 1, 2024)]

8. When a __(insert name of sponsoring organization)__ staff member is working with a rider and finds it necessary to obtain written information from another person or agency, it will be necessary to obtain a signed release from the rider or representative. This release will indicate that the rider or representative has given

permission for release of information to __(insert name of sponsoring organization)__.

9. When a __(insert name of sponsoring organization)__ staff member either receives requested written information or releases written information about a rider to another person or agency, a written or verbal follow-up will be given to the rider. This follow-up will inform the rider as to what information was released or obtained and what progress has been made in helping with their individual situation. A record of the follow-up will be kept in the rider's file.

10. When a staff member receives unsolicited information from the rider the staff member may legally need to share that information, e.g., suspected abuse. The staff member may also ask the rider for permission to make an appropriate referral, i.e., [Gatekeeper] function.

11. When a staff member receives unsolicited information about a rider from family members, [Gatekeepers], etc. the staff member may share in the information with the rider. Professional judgment will determine what to share.

12. The fact that a situation has been made public through any of the new media does not alter the fact that this person still has confidentiality privileges with __(insert name of sponsoring organization)__. For example, if a rider has been having difficulties with a given problem and is arrested, __(insert name of sponsoring organization)__ confidentiality procedures will be maintained.

13. The fact that a case has been made public through any of the news media does not alter the fact that this person still has confidentiality privileges with __(insert name of sponsoring organization)__. For example, if a client has been having difficulties with a given problem and is arrested, __(insert name of sponsoring organization)__ confidentiality procedures will be maintained.

I have read and understand the above Confidentiality Policy:

Signature: _____ Date:_____

Disqualifying Crimes

Disqualifying Crimes (Washington State Example)

Disqualifying crimes are addressed in three areas by [Washington Administrative Code (WAC)]. Regulations of executive branch agencies are issued by authority of statutes. The [WAC] codifies the regulations and arranges them by subject or agency. The online version of the [WAC] is updated twice a month and should always be referenced for the most current regulations. Copies of the [WAC] as they existed each year since 2004 are available in the [WAC archive].

Permanent Prohibitions – Criminal convictions permanently prohibiting licensing, contracting, or authorizing unsupervised access to children or to individuals with developmental disability. [WAC 388-06-0170]

Other Prohibitions –Other criminal convictions that prohibit working with children or individuals with a developmental disability. Disqualification if it has been less than five years from time of conviction. [WAC 388-06-0180]

Exceptions –Persons with convictions may be able to have unsupervised access to children or individuals with a developmental disability under limited circumstances. [WAC 388-06-0190]

Donation and Contribution Request Policies

Donation Policy(Washington State Example)

1. Riders of volunteer transportation networks should be those persons, including their personal attendants, who because of physical or mental disability, income status, or age (too old or too young) are unable to transport themselves or purchase appropriate transportation.

2. Persons who receive services funded by Title III of the Older Americans Act must be given a free and voluntary opportunity to contribute to the cost of services provided. The same opportunity must be extended to persons who receive [Senior Citizens Services Act (SCSA)], funded services that are not subject to a means test. [Chapter 74.38 Revised Code of Washington (RCW)].

3. Other persons in need of special transportation, regardless of funding source, should be afforded similar opportunities, as are the persons in the categories above.

4. The service provider must protect each person's privacy with respect to his or her contribution, establish procedures to safeguard and account for all contributions made by users of the service and use all such contributions to expand the service that received the contribution.

5. The service provider may develop a suggested contribution schedule. If a schedule is developed, the provider must consider the income ranges of older persons in the community and the provider's other sources of income. No otherwise eligible person may be denied service because they will not or cannot contribute to the cost of service.

Contribution Request (Washington State Example)

1. Volunteer drivers are not allowed to receive donations. In order to assure that riders are afforded the opportunities described above, the may be mailed a detailed accounting of volunteer trips provided, length of the trip, and a suggested donation rate. Those factors may be totaled in the form of an aggregate suggested donation.

2. A copy of the aggregate accounting can be sent to persons who have agreed to pay for the transportation services. Included are family members, personal representatives, friends, and agencies such as [Washington Department of Veterans Affairs (DVA)] that have agreed to pay at the suggested donation rate.

Driver Code of Conduct (Example)

1. All volunteer drivers will act in a professional manner at all times.

2. Reports of staff or volunteer driver misconduct will be the cause for immediate suspension from client service. Confirmation of misconduct shall be cause for removal of the staff or volunteer driver involved from serving clients. The manager may be required to report all incidents to the state or federal funding agencies.

3. If the state funding agency(ies), and/or __(insert name of sponsoring organization)__ receives complaints regarding any volunteer driver transporting riders, and/or it is determined that the volunteer driver is not performing the service in a safe, reliable, or responsible manner and corrective action has not resulted in improved performance, the manager will remove the volunteer driver from service to riders.

4. If any volunteer is suspended from service due to complaints or a determination that the person is not performing the service in a safe, reliable, and responsible manner they will not return to service until the manager has developed a Plan of Improvement.

5. Volunteers shall perform the following **minimum** levels of service:

    a. A volunteer driver shall not:

        i. Make sexually explicit comments, or solicit sexual favors, or engage in sexual activity;

        ii. Solicit or accept controlled substances, alcohol, or medications from riders;

        iii. Solicit or accept money from riders;

        iv. Use alcohol, narcotics, or controlled substances, or be under their influence, while on duty. Prescribed medication can be used by a driver as long as their duties can still be performed in a safe manner and __(insert name of sponsoring organization)__ has written documentation that medication will not impact the ability of the driver;

        v. Eat or consume any beverage while operating the vehicle or while involved in rider assistance;

        vi. Smoke in the vehicle when riders are present. This rule also applies to clients and a client's escort;

        vii. Wear any type of headphones while on duty;

        viii. Be responsible for passenger's personal items.

    b. A volunteer driver shall:

        i. wear, or have visible, easy to read proper organizational identification;

        ii. as appropriate to the needs of the rider, exit the vehicle to open and close vehicle doors when passengers enter or exit the vehicle and

  provide assistance as necessary to or from the main door of the place of destination;

iii. properly identify and announce their presence at the entrance of the building at the specified pick-up location if a curbside pick-up is not apparent, or with attending facility staff;

iv. assist the passengers in the process of being seated, including the fastening of the seat belt, when necessitated by the rider's condition;

v. confirm, prior to allowing any vehicle to proceed, that all passengers are properly secured in their seat belts, car seats, and, when applicable, that wheelchairs and passengers who use wheelchairs are properly secured (Exception: Only a passenger who has a letter, carried on his/her person and signed by the passenger's physician, stating that the passenger 's medical condition prevents the rider from using a seat belt, may be transported without a fastened seat belt);

vi. provide an appropriate level of assistance to passengers, when requested, or when necessitated by a passenger's condition;

vii. provide support and direction to passengers. Such assistance shall also apply to the movement of wheelchairs and mobility-limited persons as they enter or exit the vehicle using the wheelchair lift/ramp, as applicable. Such assistance shall also include stowage by the driver of mobility aids and folding wheelchairs;

viii. be clean and maintain a neat appearance at all times;

ix. be polite and courteous to riders; riders shall be treated with respect and in a culturally appropriate manner when receiving transportation services. The manager should notify the volunteer driver of any known cultural issues significant to providing transportation services.); and,

x. respect passenger's rights to confidentiality.

I have received a copy of the above Driver Code of Conduct and will abide by the contents:

Signature: _____ Date: _____

Driver Job Description – Personally Owned Vehicle (POV)

Volunteer Transportation Driver (POV) (Example)

POSITION TITLE: Volunteer Driver

PURPOSE OF JOB: To provide transportation requested to families or individuals to help them access necessary services.

DUTIES OF POSITION: To be a careful and responsible driver.

To meet requests promptly as assigned.

To call immediately if unable to keep an assigned request.

To report any problem stemming from a transportation assignment immediately.

JOB QUALIFICATIONS: Must have a valid driver's license and good driving record (Records will be checked).

Must have vehicle liability insurance policy at least at State minimums. Must maintain vehicle in good working condition.

Must have access to a phone.

Must have and use seat belts. Must require use of car seats for infants and toddlers. Car seats will be provided by the (sponsor organization).

Willing to have children and small adults ride in the back seat if passenger side airbags are present and activated.

For the purpose of state insurance, volunteer status begins at the time the volunteer leaves their home or other point of dispatch.

REQUIRED COMMITMENTS: Must enjoy being with people and have desire to help with transportation of individuals with needs for special transportation.

Must follow volunteer Statement of Understanding.

JOB BENEFITS: Satisfaction of working with persons in need.

Reimbursement for mileage at the state's current rate and other out-of-pocket expenses.

Auto liability coverage over and above the policy amount carried by the Volunteer.

Personal liability insurance at $1,000,000.

Medical insurance though the State's Workman's Compensation program.

Errors and Omissions insurance at $1,500,000.

Driver Orientation (Example)

The __(insert name of sponsoring organization)__ is required to provide orientation to volunteers prior to their providing service. Orientation shall include:

1. Information about __(insert name of sponsoring organization)__.

2. The purpose of the Volunteer Transportation Program.

3. The role volunteers play in providing services.

4. An explanation and a copy of the job description.

5. A statement that the volunteer's personal auto insurance is their primary coverage, and

    a. That the volunteer should review their policies to ensure that there is not language that would prohibit the volunteer from providing volunteer transportation.

    b. That the Volunteer Agency maintains coverage only in excess of the driver's personal coverage.

    c. Explains what additional coverage __(insert name of sponsoring organization)__ maintains covering volunteers.

6. Volunteer's Rights and Responsibilities. Minimum requirements include:

    a. To maintain their vehicle in safe operating condition

    b. To assure that the vehicle has operable seat belts and that all passengers and the volunteer driver shall use them.

    c. To maintain client confidentiality.

    d. To exercise due care in operating the motor vehicle.

7. Reimbursement for mileage and other direct travel expenses.

8. Reporting requirements.

9. Evaluation.

10. __(insert name of sponsoring organization)__ contact and supervision.

11. Accident and other incident reporting.

Volunteer Driver Selection Guidelines (Washington State Example)

A good driver is the most important ingredient in any volunteer program. __(insert name of sponsoring organization)__ has established specific driver guidelines to qualify those persons who have volunteered to drive a public vanpool vehicle and to assure safe, reliable transportation to the public. Because the responsibilities of a volunteer driver include defensive driving and getting a group of people to and from work on time, a number of important items must be reviewed.

1. A record (abstract) of the applicant's personal and employment driving history will be obtained.

2. A [Washington] State Criminal History Background Check will be obtained by __(insert name of sponsoring organization)__.

3. An FBI Fingerprint Criminal History Background Check.

Selection of volunteer drivers is primarily dependent upon the following:

LICENSE AND EXPERIENCE: A potential volunteer driver must possess a valid [Washington] State Driver's License and have driven for at least 5 years.

AGE: A potential volunteer driver must be at least 21 years of age.

SUSPENSION OR REVOCATION OF LICENSE: Report of a suspension/revocation within the past 5 years may cause a potential volunteer driver's application to be rejected. Report of a suspension/revocation within the last 10 years for reckless driving, hit-and-run, leaving the scene of an accident, driving while under the influence of alcohol or drugs, driving while impaired, or a felony will result in application rejection.

VIOLATIONS: Any moving violations received by a potential volunteer driver will be reviewed and may result in application rejection. A "Failure to Appear" on a driving record may result in application rejection.

ACCIDENTS: Any accident in which a potential volunteer driver has been involved will be reviewed and may result in application rejection.

INSURANCE HISTORY: Cancellation or non-renewal of insurance coverage within the past 5 years will be reviewed. If the action is related to the applicant's driving behavior, the application may be rejected. Filing of a Certificate of Financial Responsibility by a potential volunteer driver due to their personal driving record may also result in application rejection.

ABILITY TO PERFORM DRIVING FUNCTIONS: A potential volunteer driver must be able to perform essential driving functions as listed in these guidelines.

DRIVER ORIENTATION COURSE: All potential volunteer drivers must complete Driver Orientation Course before receiving final approval and before driving in the program.

Final approval for a volunteer to drive a vehicle is dependent upon successful completion of the application process, successful completion of the driver orientation course, and a personal interview with the manager. On-the- road observation of any applicant or currently approved volunteer driver may occur at any time and for any

reason. Failure to meet any criteria may result in application rejection or suspension of driving privileges.

[Washington] State Legislature law allows licensed drivers aged 55 and over to receive reductions in automobile insurance premiums if they complete an approved eight hour vehicle accident prevention course. Each course includes information about the effects of aging on driving; driver problem areas such as yielding the right of way, driver awareness, speeding, passing, road signs and signals; and driving while under the influence of alcohol or drugs.

Driver Selection Standards

Selection Standards(Washington State Example)

This Selection Standards list is intended as a guideline in selecting new volunteer drivers and for evaluating the ongoing records of registered drivers. A periodic check of each driver's license record will be done <u>at least</u> annually. All drivers are informed of these standards for acceptable drivers and their responsibility to immediately report any citations or accidents, whether in their private auto or in a program vehicle. A potential volunteer driver is not approved until __(insert name of sponsoring organization)__'s requirements (application, motor vehicle records approval, review of selection guidelines, orientation, and a personal interview) have been satisfied.

To enable an objective evaluation of each applicant's record, a point system has been adopted. Above the recommended point level, a person is not allowed to drive as a volunteer driver without specific approval from the manager. The system works by running the [Washington] Department of Licensing record for the applicable driver and comparing any citations or accidents that have occurred within the last three (3) years with the list of point values. The driver's five-year record may also be reviewed in determining potential risk.

The total points are compared with the acceptable standard of four (4) or fewer points. Each citation is counted separately, even if the driver received more than one citation for the same incident. The potential volunteer driver must also meet all other standard requirements.

Points	Citation
1	Defective or problem equipment
1	Not at fault accident
1	No insurance in vehicle; expired insurance
1	Improper child restraint
1	Headphones or illegal TV
1	Expired license; license not on person
2	Failure to signal
2	Illegal turns
2	Failure to yield or stop
2	Speeding (5 to 9 over)
2	Violation of school bus sign
2	Impeding traffic (traveling too slowly)
2	Following too closely
2	Illegal lane change; improper lane travel
3	Illegal passing
3	No insurance
3	Speeding (10 to 14 over)
3	Failure to appear
3	At fault accident
3	No valid license
4	Speeding (15 or over)
5*	Driving with license suspended or revoked
5*	Hit & run (misdemeanor)
5**	Eluding a police vehicle
5**	DWI, DUI, Reckless (negligent driving)
5**	Vehicular assault/homicide, hit & run (felony)
5**	More than one accident in 3-5 years
5	Unsatisfied bench warrant

* Disqualified if in last five (5) years.
** Disqualified if in last ten (10) years.

Drug Free Workplace Policy (Example)

1. __(insert name of sponsoring organization)__'s employees and volunteers are prohibited from the unlawful manufacture, distribution, dispensing, possession, or use of a controlled substance at any of __(insert name of sponsoring organization)__'s facilities and/or during any of the programs offered by __(insert name of sponsoring organization)__.

2. Any violation of the prohibitions in item "1" above will be considered to be "Just Cause" for suspension and/or discharge under the procedures of __(insert name of sponsoring organization)__.

3. As a condition of employment or registration as a volunteer each employee or volunteer will:

   a. abide by the terms of item "1" above and;

   b. notify __(insert name of sponsoring organization)__ in writing of any criminal drug status conviction for a violation occurring in the workplace no later than five calendar days after such conviction.

4. __(insert name of sponsoring organization)__ will notify grantor agencies in writing within ten calendar days after receiving notice under item "3B" as referred to above, with respect to any employee or volunteer who is so convicted and will:

5. Take appropriate personnel action against such an employee, up to any including termination; or

6. Require such an employee to participate satisfactorily in drug abuse assistance or rehabilitation program approved for such purposes by Federal, State, or local health, law enforcement or other appropriate agency.

7. The employee and/or volunteer acknowledges by signature below that they have:

   a. been given a copy of this policy statement;

   b. reviewed this policy statement, and;

   c. understood the policy statement.

A copy of the policy will be maintained in the volunteer's Personnel File.

I have read and understand the above Policy.

Signature:_____ Date: _____

Adopted by __(insert name of sponsoring organization)__ on this date: _____

Volunteer Van Driver Essential Functions (Washington State Example)

A potential volunteer driver must be able to perform essential driving functions as listed below:

1. Safely operate 8-passenger, 12-passenger and 15-passenger vehicles on while adhering to an established time schedule.

2. Understand, adhere to, and apply [Washington State] traffic regulations and sponsoring organization's policies and procedures.

3. Able to fuel vehicle or obtain assistance from riders or service station attendant.

4. Able to clean interior and exterior of vehicle or obtain assistance from riders.

5. Able to change a flat tire or obtain assistance from riders.

6. Able to perform the daily inspection.

    a. Check for fluid leaks. Call the manager if leaks are observed.

    b. Check for body damage and report to the manager.

    c. Ensure that no obstacles are in the path of the vehicle.

    d. Check gauges after thirty-second vehicle warm-up. Report any irregularities to the manager.

    e. Ensure mirrors are clean and properly adjusted.

    f. Ensure windows are clean and clear of fog, ice, or snow before operating vehicle.

    g. Report any chips or cracks at service time or immediately if they are serious.

    h. Ensure that seat belts are all operational.

    i. Ensure that the interior of the van is clean and free of debris and that the area under the driver's seat is free of any items (flashlight, camera, etc.).

    j. Check that the brakes are working properly. Report any abnormalities immediately.

    k. Ensure that the steering operates properly. Report any abnormalities immediately.

    l. Check the exhaust system to ensure proper operation and ventilation.

7. Able to perform weekly inspection. (Optional depending on program format)

    a. Check oil level. Add oil, using container in van, if needed (keep containers).

    b. Check to ensure the coolant/antifreeze level is adequate. Add fluid if needed.

    c. Check the windshield fluid level. Add fluid if needed.

    d. Check the power steering fluid level. Add fluid if needed.

    e. Check the transmission fluid level. Add fluid if needed.

      f. Check the brake fluid level. Add fluid if needed.

      g. Check the tire pressure and tire tread. Fill air to appropriate level.

      h. Report unusual tire wear.

      i. Check the wipers. Replace or report at next maintenance.

8. Able to perform monthly inspection. (Optional depending on program format)

      a. Check belts and hoses. Report any unusual wear.

      b. Check that headlights, taillights, directional signals, and emergency flashers work properly.

      c. Check that the battery cable is tightly attached and free of corrosion.

      d. Ensure that the heater, defroster, and air conditioner work properly.

Harassment

Policy on Harassment (Example)

It is the policy of the __(insert name of sponsoring organization)__ that it will not tolerate verbal or physical conduct by any employee or volunteer which harasses, disrupts, or interferes with another's work performance or which creates an intimidating, offensive, or hostile environment.

1. All forms of harassment are prohibited but it is the __(insert name of sponsoring organization)__ 's policy to emphasize that sexual harassment is specifically prohibited. Each supervisor has a responsibility to maintain the workplace free of any form of sexual harassment. No supervisor is to threaten or insinuate, either explicitly or implicitly, that an employee's refusal to submit to sexual advances will adversely affect the employee's employment, evaluation, wages, advancement, assigned duties, shifts, or any other condition of employment or career development. In addition, no supervisor is to favor in any way any applicant or employee because that person has performed or shown willingness to perform sexual favors for the supervisor.

2. Other sexually harassing conduct in the workplace, whether committed by supervisory or non-supervisory personnel, is also prohibited. Such conduct includes:

    a. sexual flirtations, touching, advances, or propositions;

    b. verbal abuse of a sexual nature;

    c. graphic or suggestive comments about an individual's dress or body;

    d. sexually degrading words to describe an individual; and

    e. the display in the workplace of sexually suggestive objects or pictures, including nude photographs or illustrations.

3. Any employee who believes that the actions or works of a supervisor or fellow employee constitute unwelcome harassment has a responsibility to:

    a. tell the supervisor or fellow employee that their action or words are unwelcome and are considered harassment;

    b. report or complain as soon as possible to the appropriate supervisor or to the President of the Board of Directors if the complaint involves the director.

4. All complaints of harassment must be investigated promptly in a manner that is as impartial and confidential as possible. If the employee is not satisfied with the handling of a complaint or the action taken by the manager then the Grievance Procedure should be followed.

I have read and understand the above policy and signing below constitutes an agreement to adhere to this policy.

Signature: _____Date:_____

"Gatekeeper" Training Content (Washington State Example)

The [Local Social Service Organization] is committed to enhancing lives and supporting communities with Transportation, Nutrition, Information & Assistance/Care Management, Respite, and Home Care Services. The primary mission of this community-based [Social Service Organization] is to serve older persons in their homes for as long as possible. To target and identify those older adults who may be isolated and at-risk, the [Information & Assistance/Care Management Program] depends on community members, called [Gatekeepers], to assist the staff in locating vulnerable adults who may be in need of assistance.

The [Information & Assistance/Care Management staff members] make home visits to inform older people of the services available in [Program Area]. The [Care Managers] will assess each individual's needs or concerns.

These professional staff members assist older adults with filling out forms for Social Security benefits, Medicaid, Food Stamps, in-home services Energy Assistance, and Weatherization. They help provide access to transportation services through referrals to [Local Transportation Providers]. Many older adults and persons with disabilities need part-time help in order to remain in their own homes. The [In-Home Worker Registry] provides a list of screened and qualified people who want to do yard work, housework, or serve as live-in companions. The [Care Managers] help the client interview prospective workers and suggest terms of employment.

The [Care Managers] can also help locate health appliances, such as wheelchairs, walkers, and emergency response devices, e.g., Lifeguard/Lifeline, to help the individual remain at home. The [Care Managers] help clients sort through the confusing maze of Medicare claims and insurance policies. They also introduce older adults to the [Senior Nutrition Program]; a nutritious noon meal served in a social setting in [Names of Locations]. The workers also refer people to appropriate services including Home Health, State-funded home care programs, legal services, and hearing clinics.

In order to effectively assist area older persons, help is needed from community members. As volunteer drivers you can assist by letting us know about an older person who may want to utilize our services. While we would like to know every person over 60 years of age living in the county, certain situations demand immediate attention. Those situations we feel indicate a prompt call to our office which is listed on the next page.

CALL (LOCAL SENIOR SERVICES AGENCY) WHEN YOU OBSERVE:

1. Change in appearance: hair uncombed, dirty; soiled clothes; clothing inappropriate for weather.

2. Condition of the home:

   a. Exterior/interior in need of repair

   b. Little or no food

   c. Old newspapers/possessions lying around

     d. Calendar on wrong month or year

     e. Strong odors

     f.   Neglected pets

     g. Stove burner left on

3. Little or no understanding of what is being said; confused; inappropriate response; not oriented to person, place, time; forgetful; repetitive; constant reminiscing.

4. Depression:

     a. Recent loss or death of a relative, friend, or pet

     b.   Remarks such as "I don't care...what's the use."

     c. Complaints about not eating/sleeping

     d. Anxious, uncomfortable, fidgety appearance

     e. Anger; hostility directed at self, you, or another; suspicious

     f.   Relies on tranquilizers/alcohol

     g. Recent personality changes

5. Physical losses:

     a. Loss of hearing, sight

     b. Inability to move easily

     c. Chronic (continual) illness

     d. Numerous medicine bottles/prescriptions

     e. No contact with a doctor in years

     f.   Any other changes in health

6. Lack of social relationships; no mention of family or friends.

7. Change in the usual support system; loss of dependable helper such as a friend or neighbor.

8. Very low income or inability to manage money.

9. Any person living alone over the age of 80.

PLEASE CONTACT __(insert name of sponsoring organization)__ TO GET HELP FOR AN OLDER PERSON

PHONE: _____ E-MAIL: _____

Liability, Standards, and Indemnification (Washington State Example)

1. Liability:

   a. Under [RCW (Revived Code of Washington) 24.06.035], a member of a non-profit board of directors or an officer has immunity from liability as granted in [RCW 4.24.264].

   b. Under [RCW 4.24.264] member of a board or an officer is not individually liable for any discretionary decision or failure to make a discretionary decision within his or her official capacity as a director or officer unless the decision or failure to decide constitutes gross negligence.

2. Standards:

   a. Under [RCW 23B.08.300] and [RCW 23B.08.420] the general standards for a director or officer are to:

      i. act in good faith;

      ii. with the care an ordinary prudent person in a like position would exercise under similar circumstances; and

      iii. in a manner the director reasonably believes to be in the best interests of the corporation.

   b. A director is entitled to rely on information, opinions, reports, or statements, including financial statements and other financial date, if prepared or presented by:

      i. one or more officers or employees of the corporation whom the director reasonably believes to be reliable and competent in the matters presented;

      ii. legal counsel, public accountants, or other persons as to matters the director reasonably believes are within the person's professional and expert competence; or

      iii. a committee of the board of which the director is not a member, if the director reasonably believes the committee merits confidence.

   c. A director is not acting in good faith if the director has knowledge concerning the matter in question but makes reliance otherwise permitted by subsection (B) of this section unwarranted.

   d. A director is not liable for any action taken as a director, or any failure to take any action, if the director performed the duties of the director's office in compliance with this section.

3. Indemnification (To repay for loss or damage):

   a. Under [RCW 23B.08.520] unless limited by its articles of incorporation a corporation shall indemnify a director.

b. Under [RCW 23B.08.570], Section 2, (the corporation may indemnify and advance expenses under [RCW 23B.08.510 – 23B.08.560] to an officer, employee, or agent (e.g., volunteer) who is not a director.

c. Under [RCW 2SB.08.560] a corporation may purchase and maintain insurance, on behalf of an individual who is or was a director, officer, employee, or agent of the corporation, against liability asserted against or incurred by the individual in the capacity or arising from an individual's status as a director, officer, employee or agent.

Meal Reimbursement and Incidental Expenses Policies

Meal Reimbursement and Incidental Expenses Policies (Example)

Meal Reimbursement Policy

1. __(insert name of sponsoring organization)__ will only accept:

    a. Original restaurant meal receipts **or**

    b. Original grocery store/convenience store receipts for prepared, ready-to-eat food items that will be eaten by the volunteer driver immediately. Any extra items for spouses or clients will not be reimbursed nor will additional food items be reimbursed, such as cartons of ice cream, canned goods or frozen food items.

2. Reimbursement **cannot be paid** when Supplemental Nutrition Assistance Program (SNAP) funds (previously known as Food Stamps) are used to pay for reimbursable meal expenses at restaurants or for reimbursable ready-to-eat food items purchased from grocery stores/convenience stores.

3. All receipts must be have a date and time on them that corresponds to the time span of the authorized trip.

4. Receipts for meals will only be reimbursed when volunteering for *at least* a 4-hour time period. Also, please note that:

    a. Meals are reimbursed only for the volunteer.

    b. Meal reimbursements are **not** authorized for spouses, significant others or clients.

5. __(insert name of sponsoring organization)__ does not reimburse for tobacco or alcohol products.

Incidental Expenses Policy

1. In addition to meals, __(insert name of sponsoring organization)__ will reimburse for incidental travel expenses related to the non-automobile costs the volunteer incurs. Examples are:

    a. Parking.

    b. Highway and/or bridge tolls.

    c. Ferry tolls.

2. __(insert name of sponsoring organization)__ will reimburse for motel/hotel expenses, either pre-authorized, or as a result of weather conditions, delayed/cancelled plane flights, etc.

3. In the case of either 1 or 2 above, the expenses must be documented by original receipts.

4. Automobile expenses such as: traffic/parking fines, towing charges, gasoline, etc., will not be reimbursed. These expenses are considered to be included in the mileage reimbursement.

I have read and understand the above Policies.

Signature: _____ Date:_____

Rider Grievance Procedure

ABC Transit Customer Complaint Policy (Washington State Example)

ABC Transportation is committed to providing reliable, safe, and satisfying transportation options for the community. Customers of ABC Transportation are a fundamental aspect of our business and as such, their feedback is crucial to the growth and development of the agency.

The ABC Customer Complaint Policy has been established to ensure that riders of the system have an easy and accessible way to provide feedback to the agency. ABC transportation is open to hearing any customer feedback including complaints, comments, suggestions, or concerns.

Contacting ABC Transportation: Riders can contact ABC Transportation in the following ways:

1. **US Mail:** Riders can mail their feedback to the ABC Transportation office at 1 Main Street. Anywhere, [WA 98546].

2. **Feedback Line:** Riders can contact ABC Transportation toll free at xxx-xxx-xxxx. This line is available 24 hour a day, seven days a week

3. **E-mail:** Riders can contact ABC Transportation by e-mail at [**feedback@abctransportation.com**].

4. **Fax:** Riders can send written feedback by fax to xxx-xxx-xxxx.

5. **Language Line:** For riders who speak a language other than English, ABC Transportation will utilize the services of the AT@T Language Line to facilitate the call.

6. **Website:** Riders can offer feedback on the ABC Transportation Website.

Feedback Review Process: All feedback from customers is valued and will be reviewed by the Customer Service Manager. After review, the Customer Service Manager will distribute the customer communication to the appropriate agency representative(s).

1. Customer concerns, complaints, or employee commendations will be forwarded to the appropriate supervisor.

2. Recommendations for service or system modification will be sent to the planning department.

3. Questions regarding discrimination or bias will be sent to the agency Equal Opportunity Officer.

Feedback Acknowledgement: Anyone who submits a comment, complaint, or service suggestion to ABC Transportation shall receive a response provided they give legible contact information.

1. Feedback sent via mail or fax will receive with a response within seven business days.

2. E-mail, phone, or web originated messages will be returned with 72 hours.

Customer Appeals Process: Any person who is dissatisfied with the response they receive from ABC Transportation is welcome to appeal the decision. A review team consisting of the General Manager, ABC Customer Ombudsman (may also be County or City ombudsman or customer relations officer); a rider representative and one other staff member will review customer appeals.

Information about Policy: Information about the Customer Complaint Policy, including how to submit a complaint, will be made available to riders:

1. When customers are approved for ADA paratransit service

2. When customers are re-evaluated for ADA paratransit service or if customers are not re-evaluated, every three years

3. On comment cards available on all transportation vehicles

4. At the downtown station

5. On the website

Reporting: The General Manager shall compile a summary of rider responses for the board, staff, and employees for use in reviewing and evaluating service.

Tracking: ABC Transportation shall maintain a tracking system for all feedback from customers that provides a unique identification of each customer communication and allows ready access to information on the status of the comment at any time.

Protection from Retribution: Customers of ABC transportation should be able to submit feedback without fear of retribution from the agency. If a rider feels like they are being treated unfairly in response to the feedback that they provided, they should contact the ABC Transportation Customer Ombudsman. ABC will appropriately discipline any employee that retaliates against a customer.

Training Standards (Example)

1. **Program Orientation:** All drivers must complete basic orientation training before they transport passengers.

2. **Vehicle Orientation with Wheelchair Securement and Road Test Training:** All van drivers, paid and volunteer, must complete a vehicle orientation, wheelchair securement, and road experience/test training prior to transporting passengers. All drivers using their own vehicles are not required to complete vehicle orientation training but must have road experience/testing prior to transporting passengers. It is recommended that drivers be periodically re-evaluated. This training must be documented in the driver's Personnel File.

3. **Certified Defensive Driving Course:** All drivers, paid and volunteer, operating a __(insert name of sponsoring organization)__ vehicle or providing transportation in their own vehicle, must complete Defensive Driving Training. **The course must be completed within the first six months of driving and repeated every three years for drivers under the age of 70 and every two years for drivers over the age of 70.** __(insert name of sponsoring organization)__ offers certified Defensive Driving Instruction (8 hour) and Basic Defensive Driving Instruction (4 hour). A copy of the training certification must be kept in the driver file.

4. **Disability Awareness:** All transportation program drivers and escorts, paid and volunteer, must complete a mobility awareness and assistance training. **This course must be completed within the first six months and repeated every three years.** A copy of the training certification must be documented in the driver file.

A copy of the certifications of completion for these courses must be kept in the driver/escort's file.

Recommended Supplemental Training (not required):

      Certified CPR/First Aid Training

      Commercial Drivers License (CDL) (For van drivers)

      Customer Service Training

These training requirements apply to all volunteer driver programs:

Waivers, Agreements To Participate, and Hold Harmless* (Example)

*Forms and policies should always be reviewed by your legal counsel to ensure compliance with state and local laws and for liability purposes.

1. **RELEASE:** A Release or waiver excuses the provider of a service from responsibility from their duty to protect the participant. It is an exculpatory agreement that releases the provider from duty owed. A Release is signed prior to the service being provided. The Release is a contract between the participant and the provider organization that the participant, for consideration (payment and/or the ability to participate) will not sue for damages or injuries. The Release can include an agreement not to sue even for the negligence of the provider.

   Courts examine certain criteria before holding a Release to be valid:

   a. The Release must be signed by a participant of majority age. Since minors cannot contract they cannot legally enter into a Release agreement. Parents cannot sign for a minor, but they can sign for themselves, on their own behalf, and this would hold.

   b. There must be alternatives available to the potential participant.

   c. The Release must be voluntarily signed, that is, it must not be an adhesion contract.

   d. The adult signing the Release must be mentally competent.

   e. The language of the Release must be very clear, explicit, without ambiguity, and printed in an obvious place, that is, not hidden in small type.

2. **AGREEMENT TO PARTICIPATE:** An Agreement to Participate (ATP) or Assumption of Risk (AR), goes to two legal concepts, assumption of risk and contributory negligence. The ATP is not a contract, it is a signed acknowledgment that the participants understand all the dangers, inherent in the activity or program, that they know the rules, and that they appreciate the risks that could result from participation.

   An effective ATP will have several criteria:

   a. Must be explicitly worded.

   b. If there are rules that must be followed, it is preferable that the rules be listed in the agreement or listed on the reverse side of the paper.

   c. The possible dangers inherent in the activity, including dangers from other passengers and/or equipment, must be spelled out in detail along with the potential consequences.

   d. The ATP must be signed.

3. When transporting a minor child, or incompetent adult, an effective practice would be for the Release to be signed by the parent or legal guardian and the Agreement to

Participate to be signed by the minor. This is a good combination and affords protection to the Sponsoring Organization.

4. **HOLD HARMLESS:** An Indemnification Agreement (IA), and/or Hold Harmless Agreement (HHA) are methods of protecting staff, volunteers, and agencies from financial loss in the event of a judgment against them. An IA comes into action after an award has been made. If a participant signs an IA, is injured, sues for negligence and is awarded recovery, the Agreement comes into force. The Agreement causes the plaintiff to reimburse the defendant for the amount of the recovery. The effect is that there is no payment. The Indemnification Agreement will not help against an insolvent client if the provider is sued by a third party not bound by any agreement.

5. **GENERAL INFORMATION:** Private enterprises can use the Release successfully. Public agencies cannot depend on a Release for defense because it may be contrary to public policy: however, an Agreement to Participate and a Hold Harmless Agreement are useful for a public agency.

The use of signature forms is not suggested for fixed-route transit services; although they can be used with a specific group trip, e.g., a charter, particularly if the group is considered difficult to transport. Releases, and other legal forms, are extremely useful for specialized one-on-one transportation services provided by paid or volunteer staff using private or agency owned vehicles. Regardless of the particular circumstances they should be used for any transport considered high-risk, or non-routine.

A Driver Release section is included in the Volunteer Transportation Release form. In order for any specialized transportation provider to deliver reasonable and prudent, professional service, the legally required standard, the driver must have the right to refuse to provide the service. For the Driver Release to hold, the driver must sign voluntarily which means that the driver will not suffer adverse consequences for making a reasonable and prudent professional decision.

The service provider must have a "Policy On Refusing Service," based on the staff's judgment of the situation rather than on rules. For example, service would not be refused because a potential rider was in an unfamiliar, difficult to secure, wheelchair. Instead, a Release could be used to protect the service provider. In contrast, an obviously drug influenced, hostile person would be refused service based on the driver's professional judgment. A specialized transportation service provider faces many situations of potential liability if the driver is not appropriately trained and expected to exercise professional judgment. Rules and policies cannot substitute for judgment; they only can supplement judgment.

Sample Forms (Examples and Templates)

Adult Protective Services Reporting Form

Adult Protective Services Reporting Form (Example)

Identification of Individual(s)

Name: _____ Address: _____ Telephone: _____

Identification of Suspected Perpetrator(s)

Name: _____ Address: _____ Telephone: _____

Relationship to Individual Being Reported:

Son	Brother	Spouse	Son-in-law
Daughter	Sister	Caregiver	Daughter-in-law
Father	Mother	Other	

Description of Suspected Abuse/Exploitation/Neglect or Abandonment (Use back of report if needed.)

_____

_____

Identification of Significant Others: (if known)

Name: _____ Address: _____ Telephone: _____

Agencies Currently Providing Services to Individual(s) (if known)

Name: _____ Address: _____ Telephone: _____

Source of Report:

Reported by: (name): _____ Date of Oral Report: _____

Agency: _____

Relationship to Individual Being Reported _____

Report to:

Back-Up Plan for Daily Operations (Example)

In the event of a collision or mechanical breakdown, the driver will contact the dispatch center or the manager and inform of incident. Driver will place proper hazard equipment in the appropriate locations to alert other drivers of his/her position. The driver will remain with the vehicle and passenger(s). If possible, the vehicle will be moved to a safe location until assistance arrives. Follow appropriate collision procedures in the event of a collision.

Dispatch Center Phone #s: _____

Towing Company: _____ Phone: _____

Repair/Service Company: _____ Phone: _____

Manager or Dispatch Staff will: *

1. Contact towing company to remove vehicle and deliver to designated location.

2. Contact location where vehicle is to be towed for repairs/service.

3. Contact driver and update him/her of who is coming and approximate time of arrival.

4. An alternate driver and vehicle is dispatched to pick-up passengers and deliver them to their destination.

5. Adjustments are made to the schedule to assure passengers are delivered safely to their final destination.

6. Arrangements are made for the driver to return to dispatch after the vehicle is removed.

* *Note: This is meant to only serve as a sample to develop your back-up plan specific to your program. Your back-up plan should include names and phone numbers to contact and more in depth plans. All of this information should be laminated onto a Driver ID number.*

Sample Emergency Card:

Emergency Numbers: In case of emergency, please phone:

1. **During the Week** (8:00 to 5:00),   (insert name of sponsoring organization)__ Office(s):

Ask for: _____ Name of Manager: _____

2. **Evenings or Weekends**:

Name: _____ Phone: _____

Name: _____ Phone: _____

Name: _____ Phone: _____

3. **If no one is at home**, call "The Line": Phone: _____

Remember, in the case of accident, Call the Police.

Back-Up Plan for Vehicle Loans or Out-of-Area Service

Back-Up Plan for Vehicle Loans or Out-of-Area Service (Example)

[Date]

[Name of Borrowing Program]

[Address]

[City/Town, State Zip Code]

Attention: [Manager of Borrowing Program]

On (Date of Trip), __(insert name of sponsoring organization)__ has authorized [Name of Borrowing Program], to travel to [Destination]. The driver will be [Name of Driver] and has been approved and trained to transport passengers.

In the event that an unforeseen collision or mechanical breakdown was to occur, the driver should phone [Name of On-Call Person]. The __(insert name of sponsoring organization)__ back-up vehicle would retrieve the passengers and return them safely home. __(insert name of sponsoring organization)__ will arrange for the vehicle to be towed back to the provider site or to an alternate location for repairs.

If you have any questions regarding this trip please contact [Name of Contact] at this phone number [Phone Number(s) of Contact].

Sincerely,

[Name of Person Responsible for Back-Up Plan]

[Position of Person Responsible For Back-Up Plan]

Driver Availability

Volunteer Driver Availability (Example)

Name: _____

Please check the boxes below for the days of the week you would be interested in volunteer driving, including weekends and holidays. If there are certain time periods in which you wish to volunteer, please note. If there are particular regular dates of the month you are not available then note them in the **Comments** section below.

Day of the Week	Yes	No	Restricted Times of the Day or Daylight Only
Sunday			
Monday			
Tuesday			
Wednesday			
Thursday			
Friday			
Saturday			

Comments:

__(insert name of sponsoring organization)__ attempts to estimate the approximate length of client appointments, but realize that doctors can request more tests or procedures. Please be patient and if you think that you are going to be short on time, do not accept the ride request.

Below, please list any trips that you may not be interested in accepting. Most client medical information is confidential. __(insert name of sponsoring organization)__ is not routinely allowed to release the medical reason for appointments. The dispatch center will have this information. There may be some trips that you would prefer not to accept; for example, trips to dialysis, mental health appointments, family planning clinics, etc. Please note if you feel uncomfortable transporting certain ages and/or persons of a different sex. Note if you are comfortable with using car seats and willing to be trained.

Name: _____ Signature: _____ Date: _____

Driver Evaluation

Driver Evaluation (Example)

Date of Evaluation: _____ Driver Evaluated: _____

Ratings Abbreviations : **E**xcellent, **G**ood, **F**air, **N**eeds Improvement, **N**ot **O**bserved

Ratings	E	G	F	N	NO	Remarks
SECTION ONE						
Dresses appropriately; uniform and shoes neat and clean						
Observes condition of vehicle						
Checks fluids, lights, brakes and tires						
Secures all loose items in vehicle						
Adjusts mirrors						
Checks gauges						
Adjusts and fastens seat belt						
SECTION TWO						
Starts and stops vehicle smoothly and properly						
Checks traffic prior to moving vehicle						
Enters traffic lanes properly, using signals						
Maintains position in traffic lane						
Maintains proper speed						
Uses mirrors while driving						
Uses turn signals as appropriate						
Uses proper turning radius						
Stops at unmarked railroad crossings using flashers						
Yields as appropriate						
Passes other vehicles safely						
Anticipates traffic problems, keeping eye on the road						
Places vehicle in park when loading /unloading passengers						
Operates radio properly, including radio check						

Date of Evaluation: _____ Driver Evaluated: _____						
Ratings Abbreviations : **E**xcellent, **G**ood, **F**air, **N**eeds Improvement, **N**ot **O**bserved						
Ratings	**E**	**G**	**F**	**N**	**NO**	**Remarks**
Sensitive and courteous to passengers						
Assists passengers in and out of vehicle (paratransit)						
Informs passengers of seat belt requirement (paratransit)						
Operates lift safely						
Secures wheelchairs safely and courteously						
SECTION THREE						
Submits complete and correct driver logs in a timely manner						
Communicates well with drivers, dispatchers and supervisors						
Accepts varied assignments willingly						
Follows instructions, both written and verbal						
Attends driver meetings and training as required						
Handles donations and fare boxes appropriately						

Key To Ratings:

Excellent - Performs task with exceptional skill.	Good - Performs task well.
Fair - Performs task adequately.	Needs Improvement - Performs task inadequately; Needs additional training.
Not Observed - No opportunity to observe.	
_____	_____
Signature of Evaluator	Signature of Driver

Driver Medical/Physical Release

Volunteer Driver Medical/Physical Release (Example)

_____ I verify;

_____ I do not verify;

That (name): _____ is physically capable of operating a personal automobile for the purpose of providing volunteer transportation for individuals eligible for this service.

In addition, I have reviewed all prescription and/or over-the-counter medications currently being taken by the above individual. I have no concerns regarding their use while (name):_____ is operating a motorized vehicle.

Physician's Name: _____

Address: _____ City/Town: _____ State: ____ Zip: _____

Phone: _____ Email: _____

Physician Signature: _____ Date: _____

Please return this form directly to:

__(insert name of sponsoring organization)__: _____

Address: _____ City/Town: _____ State: ____ Zip: _____

Phone: _____ Email: _____

Volunteer Driver Reference (Example)

Name of Volunteer Applicant: _____

Name of Reference: _____

Address: _____ Phone: _____

CIRCLE OR CHECK ALL THAT APPLY FOR EACH QUESTION

1. What is the nature of the relationship with this applicant? (Check all that apply)

   employer ____ friend ____ neighbor ____ family friend ____ counselor ____

   teacher ____ relative ____ coworker ____ other

2. How long have you known the applicant? _____

3. How well do you know this person? very well ____ fairly well ____ acquaintance ____

4. Volunteers will be required to keep confidential any information given about a client. In your experience, have you ever known him/her to keep things confidential? _____

5. How would you describe this person's style with people?

   sincere ____ shy ____ shallow ____ distant warm ____ demanding ____ caring ____

   consistent ____ accepting ____ judgmental ____ indifferent ____ patient ____

   don't know ____

6. Do you feel the applicant would be compassionate and caring to the following populations? Check all those that you feel would apply:

   mentally challenged ____ physically challenged ____ behaviorally challenged ____

   low income ____ older adults ____ Non-English speaking____

7. What is the applicant's relationship with young children?

   communicates effectively ____ mild conflict ____ over protective ____

   caring ____ much conflict ____ don't know ____

8. How would you rate the applicant's relationship with teenagers?

   friendly __ has "Generation Gap" __ understanding __ impatient __ patient __

   lacks confidence __ well-liked __ stern __ accepting __ don't know

9. Would you trust the applicant with your own child or a child close to you in an unsupervised setting? Yes ____ No ____ If No, please explain:

   _____

   _____

10. Do you believe that the applicant has the moral character necessary to transport a child without supervision? Yes ____ No ____ If No, please explain:

11. Check as many of the following that describe the applicant:

    confident __ nervous/tense __ outgoing __ sense of humor __ responsible __

    temperamental __ judgmental ___ friendly __ unreliable __ flexible

12. Does this person deal well with the responsibilities and problems of everyday living?

    almost always ___ usually ___ sometimes ___ rarely ___

13. In your experience as a passenger in the applicant's vehicle, have you found him/her to be a safe and cautious driver?

    _____

14. How would you rate this person's health?

    excellent ___ good ___ poor ___ some problems ___

15. Please describe this person's strengths and weaknesses:

    Strengths:

    _____

    Weaknesses:

    _____

16. Does this person have or ever had a drinking or drug abuse problem?

    _____

17. Has this person ever been arrested for an illegal activity, including drugs or DUI?

    _____

18. Do you know any reason why this applicant would not serve well as a volunteer driver?

    _____

If you have any additional information or comments about this applicant that you would like to share with us, please feel free to call at: _____ Ask for: _____

Thank you for your cooperation!

Signature: _____ Date: _____

Driver Road Test

Volunteer Van Driver Road Test (Example)

Driver					
Date:	Satisfactory		Unsatisfactory		Corrected
Before Starting					
Pre-Trip Inspection					
Seat Adjustment					
Seatbelt Adjustment					
Mirror Adjustment					
Starting					
Trans. In Neutral or Park					
Emergency Brake On					
Instrument Check (Driver Indicate)					
Backing					
Hands at 9 and 3 o'clock					
Thumbs Not Hooked Under Wheel					
Use of Mirrors					
Emergency Flashers					
Use of Horn					
Slow Speed					
Smoothness					
Pulling Out					
Signal Use					
Clear Lane of Traffic					
Traffic Observation					
Smooth Acceleration					
Following Other Vehicles					
1,000 and 4 Rule					
Within Speed Limit					
Surveying the Road					

Driver					
Date:	**Satisfactory**		**Unsatisfactory**		**Corrected**
Intersections					
Reduces Speed					
Surveys Road					
Yields Right-of-Way					
Takes Right-of-Way					
Smooth Handling					
Counts to 3 Before Following					
Railroad Crossings					
Emergency Flashers in Advance					
Stops Short of Tracks					
Looks for Train					
Listens for Train					
Smooth Handling					
Far Right Lane Usage					
Overall Driver Performance	**Excellent**		**Good**		**Training**
Surveying the Road					
Smooth Braking					
Smooth Accelerating					
Smooth Handling					
Speed Control					
Driver Attitude					
Signature of Trainer:					

Driver Statement of Medical Condition

Volunteer Driver Statement of Medical Condition (Example)

Below is a checklist of certain conditions, the drugs commonly prescribed, and their potential side effects on driving. Check any that apply to you and describe below your condition, level of medication, the effects it has on your driving, and any other comments relative to how your physical or emotional condition and/or drugs taken influences your ability to drive safely. Then sign in the space below.

If you have no physical or emotional conditions that impair your driving and are currently taking no drugs that impair your driving, simply sign and date this page below. The information you provide will be kept confidential as required by the Privacy Act. Based on the information provided, __(insert name of sponsoring organization)__ may request a physician's release prior to authorizing volunteer driving.

CHRONIC CONDITION	DRUG TYPE	SIDE-EFFECTS ON DRIVING
_____ Arthritis	Analgesics	Drowsiness, inability to concentrate
_____ Allergies	Antihistamines	Drowsiness, confusion
_____ Common Cold	Antihistamines	Drowsiness, blurred vision, dizziness
_____ Diabetes	Oral Hypoglycemic	Drowsiness, inability to concentrate
_____ Hypertension	Antihyperactives	Drowsiness
_____ Rheumatism	Analgesics	Drowsiness, inability to concentrate
_____ Weight Control	Stimulants	False feeling of alertness, over excitability
_____ Heart Condition	Blood thinners	Drowsiness, blurred vision
EMOTIONAL STATE	**DRUG TYPE**	**SIDE EFFECTS ON DRIVING**
_____ Anxiety	Sedatives	Drowsiness, staggering
_____ Depression	Stimulants	False feeling of alertness, over excitability
_____ Fatigue	Stimulants	False feeling of alertness, over excitability

Comments

Name (Print): _____ Signature: _____Date: _____

Driver Statement of Understanding

Volunteer Driver Statement of Understanding
(Washington State Example)

The purpose of the volunteer driver is to provide safe and reliable transportation to and from essential services (e.g., medical facilities, social services, nutrition sites, etc.). Volunteer drivers in this program drive their own cars and may, or may not, be reimbursed for expenses incurred. Only expenditures that have been requested by __(insert name of sponsoring organization)__ will be considered for reimbursement. __(insert name of sponsoring organization)__ provides general liability insurance for the overall program and covers the volunteer driver with state medical insurance.

The rider being transported by a volunteer driver is a person who has been determined by __(insert name of sponsoring organization)__ to have no appropriate means of personal transportation available.

[The following minimum insurance coverage is required by the State in the Code of WA (RCW 46.29.090): $25,000 bodily injury, each person: $50,000 bodily injury, each accident: $10,000 property damage.]

I understand that I must meet these standards for motor vehicle insurance, policy, or bond. My personal insurance is the primary liability protection and must be issued by a company authorized to do business in my state of residence.

I will provide proof of coverage of my vehicle insurance. In the event that my coverage changes or is canceled, I will immediately notify __(insert name of sponsoring organization)__ of such changes or cancellations.

I have had a valid driver's license for the past five (5) years. I will provide a copy of my valid driver's license. I understand that the (Sponsoring Organization) will be requesting a State Patrol Identification History Check.

I have had no at-fault vehicle accidents in the past three years and agree to have __(insert name of sponsoring organization)__ verify my driving record. I will notify immediately & provide __(insert name of sponsoring organization)__ with a copy of:

1. A report in the event I am involved in a vehicle accident.

2. Any traffic citation that I may receive while this agreement is valid.

I am physically capable of driving my vehicle safely and will not drive while using any drug that may affect my driving ability, either prescription or "over the counter." If requested, I will provide a statement from my physician stating that I am capable of participating in this program.

My vehicle is mechanically sound and is equipped with seat belts which I will use and enforce use by my passengers. Children aged 12 & under will be placed in the rear of the vehicle & child restraint (seats chairs) will be properly used for all children under 3 years or 40 lbs. __(insert name of sponsoring organization)__ will provide appropriate child restraint equipment.

I will maintain all records required by __(insert name of sponsoring organization)__. I will not accept donations from riders, but will encourage riders to make any donation directly to __(insert name of sponsoring organization)__.

I will protect the rider's right to confidentiality. I will also respect their right to pursue an independent lifestyle, and be non-judgmental in my interactions with them.

I have been provided with information about __(insert name of sponsoring organization)__, the purpose of the Volunteer Transportation Program, and my role as a driver and responsibilities.

I will notify __(insert name of sponsoring organization)__ at the time I no longer wish to be involved in this program. Either __(insert name of sponsoring organization)__, or I, may terminate this agreement at any time.

I have read and understand the above statements.

Signature:_____ Date: _____

Driver Training Checklist (Example)

Driver's Name: _____ Driver Application Date: _____

DOB: _____ Program Orientation Date: _____

Driver Type: Agency Vehicle: __ Personally Owned Vehicle (POV): __ Combination: __

Insurance Confirmed: _____

TRAINING COURSE	DATE	DATE	DATE
Vehicle Orientation (N/A for POV)			
Wheelchair Securement Training			
Road Experience Training/Testing			
Defensive Driving Course			
4-Hour			
8-Hour			
Re-certification			
Disability Awareness			
Aging Awareness			
Assisting Mobility			
Communication Skills			
ENHANCEMENT TRAINING			
CPR			
First Aid			
Customer Service Training			

Exit Interview

Exit Interview (Example)

Name of Volunteer Driver: _____ Date: _____

Name of Interviewer: _____

1. Did the position match the work you desired?

2. Why have you decided to leave your position?

3. How would you describe your relationship with other volunteers and/or paid staff?

4. How would you describe your relationship with program staff?

5. What did you like most about your experience?

6. What was the hardest part of the job?

7. What recommendations for change would you make?

8. Would you recommend this opportunity to others?

9. Is there any other information that you would like to provide?

10. Would you consider volunteering for the (Sponsoring Organization) in the future?

Exposure Incident Report (Example)

Use this form to report any bloodborne pathogen exposure incidents. An exposure incident is a specific contact of blood or other potentially infectious bodily fluid with non-intact skin, eye, mouth or other mucous membranes.

Date and time of exposure: _____ Report Date: _____

Name (person exposed): _____

Address: _____ Phone: _____

Agency: _____

Name of Customer (Source of bodily fluid): _____

Address: _____ Phone: _____

Name(s) of witnesses: _____

Part of body exposed to bodily fluid: _____

Type of bodily fluid: _____

Describe incident: _____

_____

_____

_____

Treatment received at: _____

Name of physician: _____

Employee/volunteer signature: _____ Date: _____

Supervisor signature: _____ Date: _____

Action taken: _____

_____

_____

_____

Email form to: (Email address of __(insert name of sponsoring organization)__)

FBI Fingerprint Form (Sample)

The FBI does not allow copies to be submitted. An actual FBI Form 258 has to be used. These forms either can be ordered in bulk or secured from local law enforcement officials.

Front of FBI Form 258

Back of FBI Form 258

FEDERAL BUREAU OF INVESTIGATION
UNITED STATES DEPARTMENT OF JUSTICE
CJIS DIVISION/CLARKSBURG, WV 26306

OMB Control No. 1110-0046

APPLICANT

1. LOOP
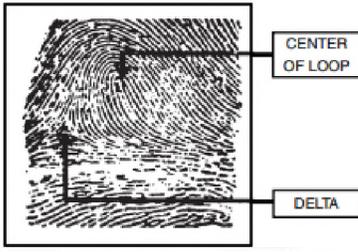
CENTER OF LOOP

DELTA

THE LINES BETWEEN CENTER OF LOOP AND DELTA MUST SHOW

2. WHORL
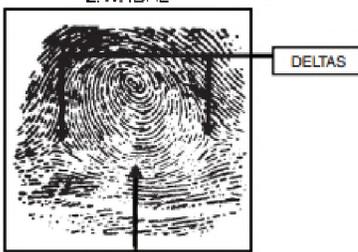
DELTAS

THESE LINES RUNNING BETWEEN DELTAS MUST BE CLEAR

3. ARCH
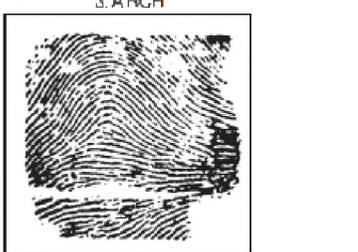
ARCHES HAVE NO DELTAS

FD-258 (Rev. 10/31/2023)

THIS CARD FOR USE BY:

1. LAW ENFORCEMENT AGENCIES IN FINGERPRINTING APPLICANTS FOR LAW ENFORCEMENT POSITIONS.*

2. OFFICIALS OF STATE AND LOCAL GOVERNMENTS FOR PURPOSES OF EMPLOYMENT, LICENSING, AND PERMITS, AS AUTHORIZED BY STATE STATUTES AND APPROVED BY THE ATTORNEY GENERAL OF THE UNITED STATES. LOCAL AND COUNTY ORDINANCES, UNLESS SPECIFICALLY BASED ON APPLICABLE STATE STATUTES DO NOT SATISFY THIS REQUIREMENT.*

3. U.S. GOVERNMENT AGENCIES AND OTHER ENTITIES REQUIRED BY FEDERAL LAW.**

4. OFFICIALS OF FEDERALLY CHARTERED OR INSURED BANKING INSTITUTIONS TO PROMOTE OR MAINTAIN THE SECURITY OF THOSE INSTITUTIONS.

Please review this helpful information to aid in the successful processing of hard copy civil fingerprint submissions in order to prevent delays or rejections. Hard copy fingerprint submissions must meet specific criteria for processing by the Federal Bureau of Investigation.

Ensure all information is typed or legibly printed using blue or black ink.
Enter data within the boundaries of the designated field or block.
Complete all required fields. If a required field is left blank, the fingerprint card may be immediately rejected without further processing.

• The required fields for hard copy civil fingerprint cards are: ORI, Date of Birth, Place of Birth, NAM, Sex, Date fingerprinted, Reason Fingerprinted, and proper completion of fingerprint impression boxes.

Do not use highlighters on fingerprint cards.
Do not enter data or labels within "Leave Blank" areas.
Ensure fingerprint impressions are rolled completely from nail to nail.
Ensure fingerprint impressions are in the correct sequence.
Ensure notations are made for any missing fingerprint impression (i.e. amputated).
Do not use more than two rolls per fingerprint impression block.
Ensure no stray marks are within the fingerprint impression blocks.

Training aids can be ordered online via the internet by accessing the FBI's website at fbi.gov, click on "Fingerprints", then click on "Ordering Fingerprint Cards & Training Aids". Direct questions to the Biometric Services Section's Customer Service Group at (304) 625-5590 or by e-mail at identity@fbi.gov.

Social Security Account Number (SSAN): Pursuant to the Privacy Act of 1974, any Federal, state, or local government agency that requests an individual to disclose his or her SSAN, is responsible for informing the person whether disclosure is mandatory or voluntary, by what statutory or other authority the SSAN is solicited, and what uses will be made of it. In this instance, the SSAN is solicited pursuant to 28 U.S.C 534 and will be used as a unique identifier to confirm your identity because many people have the same name and date of birth. Disclosure of your SSAN is voluntary; however, failure to disclose your SSAN may affect completion or approval of your application.

PRIVACY ACT STATEMENT

Authority: The FBI's acquisition, preservation, and exchange of fingerprints and associated information is generally authorized under 28 U.S.C. 534. Depending on the nature of your application, supplemental authorities include Federal statutes, State statutes pursuant to Pub.L. 92-544, Presidential Executive Orders, and federal regulations. Providing your fingerprints and associated information is voluntary; however, failure to do so may affect completion or approval of your application.

Principal Purpose: Certain determinations, such as employment, licensing, and security clearances, may be predicated on fingerprint-based background checks. Your fingerprints and associated information/biometrics may be provided to the employing, investigating, or otherwise responsible agency, and/or the FBI for the purpose of comparing your fingerprints to other fingerprints in the FBI's Next Generation Identification (NGI) system or its successor systems (including civil, criminal, and latent repositories) or other available records of the employing, investigating, or otherwise responsible agency. The FBI may retain your fingerprints and associated information/biometrics in NGI after the completion of this application and, while retained, your fingerprints may continue to be compared against other fingerprints submitted to or retained by NGI.

Routine Uses: During the processing of this application and for as long thereafter as your fingerprints and associated information/biometrics are retained in NGI, your information may be disclosed pursuant to your consent, and may be disclosed without your consent as permitted by the Privacy Act of 1974 and all applicable Routine Uses as may be published at any time in the Federal Register, including the Routine Uses for the NGI system and the FBI's Blanket Routine Uses. Routine uses include, but are not limited to, disclosures to: employing, governmental or authorized non-governmental agencies responsible for employment, contracting, licensing, security clearances, and other suitability determinations; local, state, tribal, or federal law enforcement agencies; criminal justice agencies; and agencies responsible for national security or public safety.

PAPERWORK REDUCTION ACT NOTICE
According to the Paperwork Reduction Act of 1995, no persons are required to provide the information requested unless a valid OMB control number is displayed. The valid OMB control number for this information collected is 1110-0046. The time required to complete this information collected is estimated to be 10 minutes, including time reviewing instructions, gathering, completing, reviewing and submitting the information collection. If you have any comments concerning the accuracy of this time estimate or suggestions for reducing this burden, please send to: Department Clearance Officer, United States Department of Justice, Justice Management Division, Policy and Planning Staff, Washington, DC 20530.

INSTRUCTIONS:

* 1. PRINTS MUST GENERALLY BE CHECKED THROUGH THE APPROPRIATE STATE IDENTIFICATION BUREAU, AND ONLY THOSE FINGERPRINTS FOR WHICH NO DISQUALIFYING RECORD HAS BEEN FOUND LOCALLY SHOULD BE SUBMITTED FOR FBI SEARCH.

2. IDENTITY OF PRIVATE CONTRACTORS SHOULD BE SHOWN IN SPACE "EMPLOYER AND ADDRESS". THE CONTRIBUTOR IS THE NAME OF THE AGENCY SUBMITTING THE FINGERPRINT CARD TO THE FBI. UNIVERSAL CONTROL NUMBER, IF KNOWN, SHOULD ALWAYS BE FURNISHED IN THE APPROPRIATE SPACE.

** 3. MISCELLANEOUS NO. - RECORD: OTHER ARMED FORCES NO. PASSPORT NO. (PP) ALIEN REGISTRATION NO. (AR), PORT SECURITY CARD NO. (PS), SELECTIVE SERVICE NO. (SS) VETERANS' ADMINISTRATION CLAIM NO. (VA).

Incident & Collision Report

Incident & Collision Report (Example)

Accident: _____   Incident: _____

Date: _____   Time: _____   Region #: _____   County: _____

Medical Treatment: Yes or No

    Injuries: Yes/No   911 Called: Yes/No   ER Visit: Yes/No Admitted Yes/No

Driver Sent for Drug and Alcohol Testing: Yes/No   Test Results: _____

Client Name: _____ PIC: _____   Non-Ambulatory: ___ Ambulatory: ___

Accident/Incident Narrative: _____

_____

_____

_____

Insurance Company Name, Contact, Policy # _____

(Attach Additional Documentation)
Driver Report: __ Dispatcher Report: __ Broker Report: __ Other: __

FOLLOW-UP: **Date: _____**

Driver Status: Terminated: _____   Suspended: _____   Re-trained: _____ Other: _____

Narrative:

_____

_____

_____

_____

Client or Advocate Re-Contacted: Date: _____

Narrative:

_____

_____

_____

_____

No follow-up required; investigation closed:

Date: _____   Initials:_____

Volunteer Driver Incident Report (Example)

1. Driver Name: _____

2. Date of Incident: _____

3. Time of Incident: _____

4. Location of Incident: _____

5. Name of Rider(s) Involved: _____

6. Address: _____

7. Phone Number: _____ Authorization Code: _____

8. Car Seat or Booster Seat in Use? _____

9. Name & Phone Number of Witnesses to Incident:

   Name & Phone: _____

   Name & Phone: _____

   Name & Phone: _____

10. Explain in Detail: _____

PLEASE FILL OUT THIS FORM COMPLETELY AND MAIL TO:

Lift Operation Procedures* and Checklist (Example)

Wheelchair lifts make it possible to load wheelchairs of all weights in an efficient and safe manner. However, lifts are potentially hazardous equipment. They must be maintained and operated properly. Considerable caution and awareness is needed when operating a lift. No one but the vehicle operator should operate the vehicle wheelchair lift. Lifts may differ slightly in structure and operation. Therefore, each vehicle operator should be familiar with all the lifts likely to be used. __(insert name of sponsoring organization)__ may have specific policies pertaining to wheelchair lift operations. It is recommended that you check with your manager or supervisor concerning these policies.

What follows is general information and guidance for lift operation procedures. Programs should ensure that current policies and procedures agree with manufacturer's guidelines for the securement systems currently in use. For more information about where to find training for volunteer drivers, see Section 4 – Establishing and Managing a Volunteer Driver Pool.

Loading Riders Who Use Wheel Chairs: ....**Checklist**

1. Upon arriving at your destination:

    a. Stop on level ground. ....☐

    b. Make certain there is room for the lift platform to open without hitting obstacles. ....☐

    c. Put vehicle in Park, not Neutral.
    The lift will not work if the transmission is in Neutral. ....☐

    d. Set the parking brake. ....☐

2. Opening doors:

    a. Open lift doors from outside vehicle. ....☐

    b. Securely lock doors in open position. ....☐

3. Deploying the lift:

    a. The lift is always operated from the ground ....☐

    b. Do not remain in the vehicle while raising and lowering the lift platform. ...☐

    c. Lower the lift platform until it rests entirely on the ground. ....☐

    d. Unfold the outboard roll stop. ....☐

    e. Fasten the wheelchair seat belt around the rider. ....☐

4. Interacting with passengers and getting onto the lift platform:

    a. Greet passengers; talk to them, not around them. ....☐

    b. Ask passenger if they would like assistance in getting onto the lift platform.☐

    c. If lift is ADA approved, the passenger may ride on the lift facing the van...☐

    d. If the lift is not ADA approved, explain the potential hazard and request that the passenger ride on the lift with their back to the vehicle.
Remember, under the ADA, it is the rider's choice....................................☐

    e. If the lift is equipped with a safety belt make certain that it is attached and secure. ....☐

5. Lift operation:

    a. Set the wheel chair locks..☐

    b. Have the rider hold on the handrails if able..☐

    c. Remind the rider to keep arms and hands within the lift area and clear of moving parts...☐

    d. Stand on ground with one hand on the wheelchair and one hand operating the controls..☐

    e. Raise the platform only a couple of inches...☐

    f. Check the front safety barrier to make sure it is locked.............................☐

    g. Continue raising the lift platform to the floor level......................................☐

6. Transferring to the vehicle:

    a. Put lift controls in secure position with one hand while holding onto the wheelchair with the other..☐

    b. Release the wheelchair wheel locks. ....☐

    c. Push the wheelchair into the van. ....☐

    d. Reach in and lock the wheels..☐

    e. Fold the lift into the travel position and shut the doors. ....☐

7. Unloading: Use a logical reversed sequence for unloading.

Notes on power chairs and scooters - Caution is needed when loading a power wheelchair onto a lift. If the chair's power is left on, there is potential for the chair to move while on the lift, even if the brakes are applies. Many individuals operating these chairs are slow in reaction, or may have involuntary movements which may cause their hand or arm to hit the control stick. It is recommended that the power sources be disengaged while lifting a power wheelchair.

Boarding standees on the lift - The ADA allows anyone who wishes to board the vehicle standing on the lift. The procedures for loading a standee are similar to those used for boarding a person in a wheelchair. With an ADA approved lift the person should board facing inward after the roll stop has been lowered. The person should be encouraged to let go of any mobility device like a walker and to grasp the hand rails. The safety belt, if there is one, should be secured behind the standee. Once the lift is in level with the floor of the van, the standee should be instructed to move into the vehicle.

Walking Aids - When transporting people who use walking aids, it is the driver's responsibility to store the walking aid in a safe and secure place. Ask the passenger if there is a special way they would like the walking aid to be handled. If a passenger is using a cane, they may prefer to keep it with them.

Manual operation of the lift - Most lifts are equipped with a hydraulic pump located within the plastic motor housing on the side of the lift. A steel pump arm is found on the outside of the housing or the lift frame.

- **Lowering:** To lower the platform manually, turn the bleeder valve, located near the pump opening, just enough to allow the platform to drop slowly. Do not unscrew it too far or hydraulic fluid will leak. When the platform has reached the ground tighten the valve.

- **Raising:** To raise the platform, insert the pump arm into the pump opening. Pump the arm. The platform will rise very slowly.

Personnel Checklist

Personnel Checklist (Example)

ITEM	DATE IN FILE	DATE UPDATED		
		2025	2026	2027
Volunteer Job Description Signed				
Volunteer Registration Form				
Acknowledgement of Requirements				
Confidentiality Certificate				
DMV/Medical Problems Statement				
Copy of Driver's License				
Copy of Current Insurance				
Consent for PFP Criminal History				
Consent for MVR Driving Record				
Medical History release form				
Vehicle Inspection				

Vehicle #1 Description:

Make: _____ Model: _____ Year: _____ Color: _____ License Plate: _____

Vehicle #2 Description:

Make: _____ Model: _____ Year: _____ Color: _____ License Plate: _____

Signed Job Description Mailed to Volunteer:

Supervisor Signed All Forms:

Provider Number Assigned: _____ Date: _____

Pre-Trip Inspection (Example)

1. **Conducting the Inspection:** Before you begin, you should have a copy of the checklist in hand and have a pen to write with. The checklist will help you in performing the inspection in a logical sequence and assist you in doing a complete and thorough inspection of the vehicle. If your vehicle does not contain all of the equipment that is reflected in the checklist, i.e., organization van vs. personally owned vehicle (POV), simply cross out the items that do not apply and move on to the next item.

2. **Fluid Levels, Hoses, Belts:** Before you start the engine, lift the hood. Check the fluid levels in the radiator, battery, and windshield washer. Note any excessive usage and add the appropriate fluids. Check the oil level and add if indicated. Note any of the fluid additions.

   Visually check the hoses for signs of leaking and/or cracking. In a similar way check the belts.

3. **Interior, Lights, Dials, Gauges and Ventilation:** Once you get behind the wheel, set the emergency brake, start the vehicle, check the appropriate lights, dials, and gauges. For example, the oil gauge or warning light should give you an indication as to whether the oil pressure is sufficient to keep the engine running without damaging it. Do not allow the engine to "race" when you first start it. If the engine seems to be running too fast (idle,) and will not slow down, do not put it into gear. Shut it down and report the problem to the manager.

   If the alternator or generator light stays on or if there is a gauge that tells you the battery is not charging, you could end up with a dead battery on the route. If you do get such an indication you should have it corrected before starting out on your assigned trip.

   Check to see if heater and air conditioning are working. Notice any foreign smells coming from the ventilation system. Inspect the interior for any hazards, torn upholstery, loose objects, etc. Check the interior lights, and seat belts. If car seats or other child restraint systems are to be use, check to determine if they are matched to the vehicle and that they can be properly activated. Note the presence of driver side airbags in planning for the anticipated passengers, i.e., if they are present and activated then children and small adults should not ride in positions with functioning air bags.

   Check for the vehicle registration and proof of insurance; make sure that neither has expired. Check for presence of EZ Clean Kit in the vehicle. Check supplies in the kit.

4. **Windows and Mirrors:** Make sure that all windows and mirrors are free of ice, snow, or frost before moving the vehicle. If it is not too cold outside, you can check to see that the windshield washer and wipers are working.

   Adjust all of your mirrors to make sure that you can see what it is you need to see within your safety zone.

5. **Horn, Steering Wheel, and Brakes:** Tap the horn to make sure it works.

Move the steering wheel from side to side to make sure that it does not have excessive "play" in it. Push on the brake pedal. It shouldn't feel soft or spongy.

6. **Doors and Emergency Exits:** Examine all regular and emergency doors to make sure that they are functional and not obstructed or otherwise damaged. The time to find out that an emergency door does not work is before the vehicle is put into service.

7. **Left Front:** Turn on all the exterior lights, including the high beams, turn signals and emergency flashers. Make sure the emergency brake is on and get out and check the left front vehicle lights to make certain that they are clean and not burned out. As you begin this outside inspection, remember to note any new damage to the vehicle.

8. **Left Side Tires:** Look at the left front and left rear tires for signs of damage or obvious pressure problems. An over inflated tire will give a rougher ride. An under inflated tire will build up heat and make it more susceptible to damage from obstacles or potholes in the road. If you have a tire gauge, check the pressure against recommended levels.

9. **Trunk, Rear Lights, and Signs:** Check in the trunk, interior, or under the vehicle for the spare tire and tire changing tools. Check inflation of the spare. Check for presence of an emergency equipment kit (chains, flashlight, flares, blankets, ice scrapers).

   Inspect all lights on the rear of the vehicle such as the emergency flashers, taillights, etc. If there are any signs on the back of the vehicle make sure that they are clean. If lights are dirty clean them.

   Check to determine if the license tabs have expired.

10. **Under Vehicle Inspection:** Stand back a few feet from the rear of the vehicle and look under the vehicle or any foreign objects or fluid leaks. If there any objects hanging or wedged under the vehicle, either remove them or determine if part of the vehicle is hanging down. If a part of the vehicle is hanging down, report it to the manager for repair before starting your run. If you see any puddles of any kind other than obvious rainwater or water from melted snow/ice, check the source of the leak and report it to the manager.

11. **Right Side Tires:** Now check the right rear and right front tires just as you did the tires on the left side. Again, look for any signs of fresh vehicle damage.

Pre-Trip Inspection Form

Pre-Trip Inspection Form (Example)

VEHICLE INSPECTION:											DATES
	am	pm	am	pm	am	pm	am	pm	am	pm	Comments
PRE-START UP											
Check Oil											
Radiator, Washer Fluid											
Battery Fluids, Connections											
INTERIOR (Start Engine)											
Fuel Level											
Alternator Function											
Heat/ Defrost/ AC											
Interior Lights											
Upholstery, Loose Object											
Child Car Seats/Booster											
Seatbelts/ Straps/ Cutter											
First Aid Kit/Body Fluids Kit											
Fire Extinguisher											
Emergency Exits/Doors											
Registration/ Insurance											
Radio/Cell Phone											
Horn											
Brakes (Travel, Feel)											
Steering Wheel (Play)											
WINDOWS/MIRRORS											
Cleared of Ice/Snow											
Foot Brake/ Parking Brake											
Wipers/Washers											

VEHICLE INSPECTION:										DATES
	am	pm	am	pm	am	pm	am	pm	am	pm	Comments
Mirrors/ Glass/Scraper										
EXTERIOR										
Head Lights (High/Low)										
Turn Signals (Front/Rear)										
Emergency Flashers										
Tires (Wear, PSI w/gauge)										
Tail Lights/Back-Up Lights										
Exhaust (Sound, Emissions)										
TRUNK/STORAGE AREA										
Spare Tire (Pressure)										
Emergency (Chains, Flares, Flashlight, Blankets)										
UNDER VEHICLE										
Obvious Leaks										
Loose/Hanging Objects										
OPERATION										
Lift										
Transmission										
Engine/Idle Speed										
DRIVER'S INITIALS										

Private Vehicle Registration

Private Vehicle Registration (Washington State Example)

Name: _____

Address: _____ City/Town: _____ Zip: _____

Phone: _____ E-Mail: _____

Vehicle(s)   #1 Make: _____ Year: _____ Air Bag(s): _____

                Model: _____ Color: _____ Seating: _____

                License #: _____

                #2 Make: _____ Year: _____ Air Bag(s): _____

                Model: _____ Color: _____ Seating: _____

                License #: _____

Insurance Company: _____

Insurance Agent: _____

Address _____ City/Town: _____ Zip: _____

Telephone: _____

I certify that I am currently insured through the above company for automobile liability insurance in an amount in excess of or equal to the minimum required under [Washington State law. (Liability: $100,000 per individual/$300,000 per occurrence/Property Damage: $50,000 per occurrence).]

Further, I agree to forward a photocopy of my Proof of Insurance Card at each renewal period.

Further, I agree to immediately notify __(insert name of sponsoring organization)__ in the event that the above liability insurance is revoked, cancelled or altered in such a manner as to no longer meet the minimum vehicle insurance requirements for the State of [Washington].

Further, I agree not to a transport any passengers as part of the volunteer driver program if these minimums liability requirements are not met, or if my [Washington] vehicle operator's license is not current and/or valid, or if the registration and license of the vehicle (s) I use to transport passengers is not current and/or valid.

Further, I certify that my vehicle(s) is in safe operating condition.

Further, I agree to hold harmless and indemnify __(insert name of sponsoring organization)__, the manager, and the passenger(s) against any or all claims arising, all or in part, from my negligence.

Further, I authorize __(insert name of sponsoring organization)__ to make periodic checks of my driving and criminal record.

Signature: _____Date: _____

Rider Registration/Trip Request (Example)

MUST BE FILLED OUT COMPLETELY   SUBMIT REQUEST TO: (Program Contact)

Riders Name: _____   Billed to: _____

Address: _____   Birthdate*: _____

City: _____   State: _____   Zip: _____

Phone: _____   Email: _____

Does rider have any other transportation available?: _____

Live Alone: Yes ____ No ____   Low Income: Yes ____ No ____   ID#: _____

Medicaid: Yes ____ No ____   Minority: Yes ____ No ____   ID#: _____

Understands English: Yes ___ No ___   Program Eligibility: _____   Race Code: _____

Have we worked with Rider Before?: Yes ___ No ____   Sub-Allocation: ____   Billing: _____

Single Parent Household: Yes ____ No ____   Social Security Number: _____

Ambulatory; Wheelchair; Walker; Attendant; Other: ____   Disabled Placard: _____

Contacted by: _____   Phone: _____

Out of Area: _____   Referring. Physician.: _____   Phone: _____

*If age is below six (6) years: Height: _____   Weight: _____

Directions/Comments:

_____

_____

Entered in database by (Initials): _____

Trip Date: _____   Car Seat Required: Yes ___ No ___   Booster Seat: Yes ___ No ___

Appointment Time: _____   Pick Up Time _____   Return Time: _____

Physician: _____   Doctor or Clinic Phone: _____

Address: _____

Purpose: _____

Provider Recommended:_____   Provider Chosen: _____   Phone: _____

Estimated Mileage: _____   Called Rider To Confirm Ride: _____

OFFICE USE ONLY:

Intake by: _____ Date: _____

Completed by: _____ Date: _____

Voucher Mailed by: _____ Date: _____

Additional Information

Transportation Request

Transportation Request (Example)

MUST BE FILLED OUT COMPLETELY

Riders Name: _____ Billed to: _____

Address: _____ Birthdate*: _____

City: _____ State: _____ Zip: _____

Phone: _____ Email: _____

Does rider have any other transportation available?: _____

Live Alone: Yes __ No __   Low Income: Yes __ No __   ID#: _____

Medicaid: Yes __ No __   Minority: Yes __ No __   ID#: _____

Understands English: Yes __ No __   Program Eligibility: _____   Race Code: _____

Have we worked with Rider Before?: Yes __ No __   Sub-Allocation: ___   Billing: ____

Single Parent Household: Yes __ No __   Social Security Number: _____

Ambulatory; Wheelchair; Walker; Attendant; Other: ____   Disabled Placard: _____

Contacted by: _____ Phone: _____

Out of Area: _____   Referring. Physician.: _____ Phone: _____

*If age is below six (6) years: Height: _____ Weight: _____

Directions/Comments:

_____

_____

Entered in database by (Initials): _____

Trip Date: _____   Car Seat Required: Yes __ No __   Booster Seat: Yes __ No __

Appointment Time: _____ Pick Up Time _____ Return Time: _____

Physician: _____ Doctor or Clinic Phone: _____

Address: _____

Purpose: _____

Provider Recommended:_____   Provider Chosen: _____   Phone: _____

Estimated Mileage: _____   Called Rider To Confirm Ride: _____

OFFICE USE ONLY:

Intake by: _____ Date: _____

Completed by: _____ Date: _____

Voucher Mailed by: _____ Date: _____

Additional Information

Trip Description

Trip Description (Example)

The purpose of the following agreement is to provide the framework for better understanding among all the participants involved in the transportation described below.

To be completed by the staff of __(insert name of sponsoring organization)__:

Rider's Name: _____ Phone: _____

Address: _____ City/Town: _____ Zip: _____

Physician's/Nurse's Name: _____ Phone: _____

Address: _____ City/Town: _____ Zip: _____

Trip Destination: _____ Phone: _____

Address: _____ City/Town: _____ Zip: _____

Approximate distance and length of time for travel: _____

Special Instructions/Directions:

_____

_____

_____

Trip Purpose:

_____

_____

_____

If for hospital admission, has admitting office been notified?   Yes: ___ No: ___

Further instructions:

_____

_____

_____

Vehicle used: Organization Van: _____   Private Auto: _____

Trip Voucher

Trip Voucher (Example)

MONTH: _____ VOUCHERS DUE IN OFFICE BY THE ___ OF EACH MONTH

Date	Name of Rider(s)	From	To	Description of trip or expense	Miles	Stops	Hours	Amount
Totals								

I hereby certify that this account of travel is accurate.

I am requesting reimbursement: YES: _ NO: _

TOTAL MILES: _____ X $. _____ = $ _____ Report Incidental Expenses Above: _____

SIGNATURE OF VOLUNTEER DRIVER: _____ DATE: _____

VOLUNTEER NAME (Print): _____

ADDRESS: _____ CITY: _____ STATE: _____ ZIP: ____

PROGRAM CODES: (OFFICE USE)

Volunteer Driver Job Application

Volunteer Driver Job Application (Washington State Example)

This application will be used to establish your eligibility as a volunteer driver for __(insert name of sponsoring organization)__. The information you provide helps us assure you, this organization, and the public that the highest standards of safety and accountability are maintained. We appreciate your cooperation and interest in our volunteer driver program. Return completed application to your __(insert name of sponsoring organization)__ Vanpool Coordinator.

Application for: Volunteer Personally Owned Vehicle (POV) Driver: ___
Volunteer Van Driver: ___   Combination: ___

Full Name:	Spouse:		
Address:	City:	State:	Zip Code:
If less than 2 years at this address, previous address:			
Phone:	E-mail:		
Date of Birth:	Social Security Number: / /		
Employer:	Job Title:		
Work Address:	City:	State:	Zip Code:
Wk. Phone:			
Supervisor:	Supervisor's Phone:		
Do you have a current and valid (Washington) State Driver's License? (please attach a copy) ☐Yes ☐No If no, please explain:			
How long have you had a driver's license? Years: _____ Months: _____			
Driver's License Number:	Expiration Date:		
If licensed in [Washington] State less than five years, list licenses previously issued: License Number/State: _____ License Number/State: _____			
Are there any restrictions on your driver's license? ☐Yes ☐No If restricted, state type and date of restriction:			
Have you ever had your driver's license suspended, revoked, or refused? ☐Yes ☐No If yes, please explain:			
Have you ever been required by the State to file evidence of Financial Responsibility (SR22)? ☐Yes ☐No If yes, please explain:			
Name of Your Automobile Insurance Company (please attach a copy of insurance card):			

Has an insurance company ever refused, cancelled, non-renewed, or given notice of intention to non-renew automobile insurance to you? ☐No ☐Yes, Cancelled ☐Yes, Refused ☐Yes, Non-renewal			
If yes, please explain and list company and agent name and phone:			
Date: Reason:			

Have you been convicted during the last 10 years of driving while intoxicated or under the influence of drugs? ☐Yes ☐No			
If yes, please explain (date, charge, jurisdiction, etc.):			

Indicate all moving violations or citations (other than parking) that you have been convicted of, forfeited bail, or paid any fines for during the past 3 years. Please give full details, including dates, below. If more space is needed, use a separate sheet.

A	Date:	Time:	Location (City and State):
	Conviction:		
	If speeding, legal limit:	Your speed:	Amount of Fine: $
	Remarks:		
B	Date:	Time:	Location (City and State):
	Conviction:		
	If speeding, legal limit:	Your speed:	Amount of Fine: $
	Remarks:		

List all motor vehicle accidents of any type or cause that you, either as owner or operator, have been involved in during the last 5 years.

#1	Date:	Time:	Driver:	Violation:
	Who was at fault?		Damage to your vehicle?	Amount: $
	Bodily injury?		Damage to other property?	Amount: $
	Description:			
#2	Date:	Time:	Driver:	Violation:
	Who was at fault?		Damage to your vehicle?	Amount: $
	Bodily injury?		Damage to other property?	Amount: $
	Description:			

Can you perform all the requirements of operating the vanpool vehicle as explained in the Volunteer Driver Selection Guidelines and have you completed the Essential Functions checklist? ☐Yes ☐No	
If no, please explain:	
Have you driven a van before? ☐Yes ☐No	
If yes, state for whom, when, where, how long:	

This application warrants a criminal history background check, and/or verification of my motor vehicle record as authorized by my signature below.

For Drivers Only. My signature below authorizes __(insert name of sponsoring organization)__ to obtain, at its sole discretion, my employment and non-employment driving record, including all Department of Licensing actions that have taken place regarding the driver's license I now hold, have held, or in the future may obtain. It also authorizes __(insert name of sponsoring organization)__ to conduct a criminal history background check from the source of its choice. I further agree to any other conditions described herein. This release continues in effect as long as I continue to serve as a __(insert name of sponsoring organization)__ volunteer driver.

Signature:	Date:

Volunteer Transportation Program Client Survey

Volunteer Transportation Program Client Survey (Example)

Name: _____   Date: _____

Address: _____   Phone: _____

PLEASE RATE THE FOLLOWING AS:	EXCELLENT	GOOD	FAIR	POOR
Were you picked up on time?	☐	☐	☐	☐
Did you arrive at your destination on time?	☐	☐	☐	☐
Was the ride comfortable?	☐	☐	☐	☐
Did you feel safe in the vehicle?	☐	☐	☐	☐
Was the driver courteous?	☐	☐	☐	☐
Did the driver wear a nametag?	☐	☐	☐	☐
When you scheduled your ride was the person on the telephone courteous?	☐	☐	☐	☐
Did the driver request you to wear a seat belt?	☐	☐	☐	☐
Was the vehicle clean?	☐	☐	☐	☐
Did the driver ask if you needed to make appropriate rest area stops?	☐	☐	☐	☐

What was the name of the driver who transported you?_____

How can we improve service to you?_____

(Please use additional paper if needed)

Please Return the Survey to:

Program Manager:

__(insert name of sponsoring organization)__:

Address:

Volunteer Transportation Release

Volunteer Transportation Release (Example)

1. **Rider:** (Indicate appropriate responses and sign)

   The undersigned assumes all reasonable risks involved in this round-trip. The length of the trips, both miles and time, has been explained to me. The vehicle to be used has been explained to me. I know that the driver (Name), **has / does not have** first aid and CPR training. The driver **has / does not have** special training in passenger assistance techniques.

   The undersigned understands and expressly assumes all the dangers of the round-trip. The undersigned waives all claims arising out of the transport whether caused by negligence, breach of contract or otherwise, and whether for bodily injury, property damage or loss or otherwise, that I may ever have against __(insert name of sponsoring organization)__, its successors and assigns, and its officers, directors, agents (e.g., volunteers), and employees, and their executors, administrators and heirs.

   Signed: _____ Date: _____

2. **Physician/R.N:** (Please sign/R.N. sign following telephone authorization.)

   There is no reason or condition that may cause the above named person difficulty during the previously described round trip. The rider does not require oxygen nor require medical attention in route. The rider may be transported in a sitting position in a private auto or agency van. Related to this transport, I hereby waive all claims that I may ever have against __(insert name of sponsoring organization)__, its successors and assigns, and its officers, directors, employees and agents (e.g., volunteers), and their heirs, executors, and administrators.

   Signed: _____ Date: _____

3. **Volunteer Driver:** (Please indicate appropriate responses and sign)

   I have read the particular circumstances of this transport and **will/will not** drive the person named above **with/without** another person to accept the responsibility of care in route. The undersigned waives all claims arising out of the transport whether caused by negligence, breach of contract or otherwise, and whether for bodily injury, property damage or loss or otherwise, that I may ever have against __(insert name of sponsoring organization)__, its successors and assigns, and its officers, directors, employees and agents and their heirs, executors, and administrators.

   Signed: _____ Date: _____

Wheelchair and Rider Securement Procedures* and Checklists (Examples)

What follows is general information and guidance for wheelchair and rider securement. Programs should ensure that current policies and procedures agree with manufacturer's guidelines for the securement systems currently in use. For more information about where to find training for volunteer drivers, see Section 4 – Establishing and Managing a Volunteer Driver Pool.

General information about securing wheelchairs.

1. Proper securement of the wheelchair and the rider are two of the most important duties a volunteer van driver has when transporting a person who uses a wheelchair or scooter.

2. All ADA-compliant buses and vans are required to have a two-part securement system, one to secure the wheelchair, and a seat belt and shoulder harness for the wheelchair user. (Department of Transportation's Americans with Disabilities Act (ADA) Accessibility Specifications for Transportation Vehicles Section 38.23(d).)

3. Wheelchairs meeting the standard set by the American National Standards Institute (ANSI)/Rehabilitation Engineering & Assistive Technology Society of North America (RESNA), ANSI/RESNA standard WC-19 have standardized securement attachment points. For more information on this standard and its applicability to transit and wheelchair transportation, see University of Michigan Transportation Research Institute's summary of WC19: Wheelchairs.

4. For more information on seat belts, see U.S. DOT Questions and Answers Concerning Wheelchairs and Bus and Rail Service Disability Law Guidance web page.

5. Wheelchair must be forward-facing.
   a. The securement system is designed to be used with the wheelchair facing forward.
   b. Wheelchair securement positions are inherently safer and wheelchairs and the human body are better capable of surviving a frontal crash when facing forward.
   c. Sled tests show that side-facing wheelchairs are unstable and often collapse.
   d. Lap and shoulder belt restraint systems are designed to be most effective in the frontal impact position. Wheelchairs are stronger in frontal loading conditions as opposed to side loading.

Procedures for securing the wheelchair.   **Checklist**

1. The wheelchair is forward facing...□

2. Center the wheelchair with the anchorages on the floor.   □

3. Set the brakes on both sides.. □

4. If applicable, turn off the wheelchair power.. □

5. At a minimum, the front straps must be the same type and the back straps the same type..   □

6. Do not interchange systems.
Use only one manufacturer's tie-down system for each wheelchair.   □

7. The wheelchair is anchored at 4 points using the manufacturer's instructions. □

8. Secure the hooks at the end of the straps to appropriate position on the front and rear of the wheelchair frame.   □

9. The ratchets are used in back and the cams are used in front.   □

10. Tighten the back first.   □

11. Operating the ratchet straps:

    a. Before attaching the tie-down to the wheelchair/scooter, ensure that the ratchet strap moves freely on the ratchet spool by pulling back on the release. ....□

    b. While holding the release back, move the ratchet handle to a fully open position. (the handle should be straight). This will allow the strap to move freely on the ratchet spool for adjustment when securing the wheelchair/scooter. ....□

    c. The ratchet lever will move freely when Steps A and B are complete. The ratchet lever will then tighten the strap securely. ....□

    d. The ratchet must be left in the fully closed position to complete the procedure. ....□

    e. To release: pull back on the ratchet lever and open the assembly side. .....□

12. The straps are attached properly:

    a. They are at as close to a 45 degree angle as possible. ....□

    b. The angle is no less than 30 degrees and no more than 60 degrees.........□

    c. They are not attached to the wheels or any detachable portion of the wheelchair. ....□

    d. They do not bend around any object...□

    e. They are away from sharp edges or corners...□

    f. They don't crisscross. ....□

    g. They are not twisted...□

    h. There is no forward or reverse movement..☐

    i. Never use the 4-point system (wheelchair securement) without
       the 3-point (seatbelt and shoulder harness) lap and shoulder belt.............☐

General information about securing the rider.

1. Always use a 3-point system (seatbelt and shoulder harness) to secure the rider.

2. The occupant restraint system is separate from the wheelchair securement.

3. The 3-point system secures the rider's pelvis and torso.

4. The occupant restraint system can be attached in several ways.

    a. To vehicle anchorage points.

    b. To the wheelchair securement system.

    c. To the wheelchair itself.

5. Follow manufactures guidelines.

Procedures for securing the rider   **Checklist**

1. Position the lap belt.

    a. Over the pelvic bones, not the abdomen. ....☐

    b. Inside the armrests, between the side panels and the seat cushion. ....☐

2. Adjust the lap belt so it is snug.   ☐

3. Position the shoulder belt.

    a. So that it does not cross the riders face or neck. ....☐

    b. Never under the rider's arm where it would cross the rib cage..................☐

4. Adjust the shoulder belt to achieve firm but comfortable tension. ☐

5. Never twist the belts.   ☐

6. Belts should always lie flat against the body.   ☐

Glossary

What Definitions Are Used?

In addition to the definitions listed below, there are many standard terms and acronyms used in the public transportation industry. National RTAP's [Transit Manager's Toolkit](#) and [Americans with Disabilities Act (ADA) Toolkit](#) include glossaries with carefully compiled lists of those terms and acronyms. To clarify information in this Toolkit, the following definitions were used for specific terms:

Agent: A person authorized by an organization to represent or act for the organization.

Legally Constituted Organization (Sponsoring Organization): Organization that is responsible for all aspects of a volunteer program. Could be public, private, non-profit, or private-for- profit.

Volunteer Drivers: Those who volunteer to drive their own cars or organization owned vehicles.

Volunteer Auto Transportation (Volunteer Escort, Personally Owned Vehicles (POV)): Transportation provided by volunteers who drive their own vehicles. The volunteers may be reimbursed expenses by a Sponsoring Organization. This mode of transportation may be used as an alternative to regular specialized transportation or to supplement paid services.

Manager: The term "manager" is used throughout the Toolkit to designate the person who is ultimately in charge of the day-to-day operations of the volunteer transportation program.