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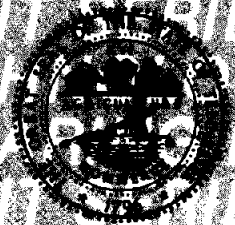
The Volunteer Transportation Program

April 1982



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Prepared for
Tennessee
Department of
Transportation



THE VOLUNTEER TRANSPORTATION PROGRAM:
SOME SUGGESTIONS AND CAUTIONS IN THE USE OF VOLUNTEERS
AS DRIVERS, ESCORTS AND OTHER TRANSPORTATION WORKERS

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PREFACE

This manual is designed to aid social service agencies, voluntary associations and churches in utilizing volunteers to provide transportation. Transportation is a constant problem for the carless elderly person living too far from the bus route or with a slight difficulty in walking that makes riding a bus inconvenient. Transportation may be difficult for the blind or retarded individual who lives in a community without a signing system which gives them the proper instruction in using mass transit. Transportation may not be available from some government sponsored program for such trip purposes as shopping, social visits, or the beauty parlor.

Volunteers can and do provide essential and nonessential transportation for many persons in need. Yet volunteers are not like other employees. They must be recruited, trained and rewarded. They must be supervised. But in each of these relationships, volunteers are different from paid staff.

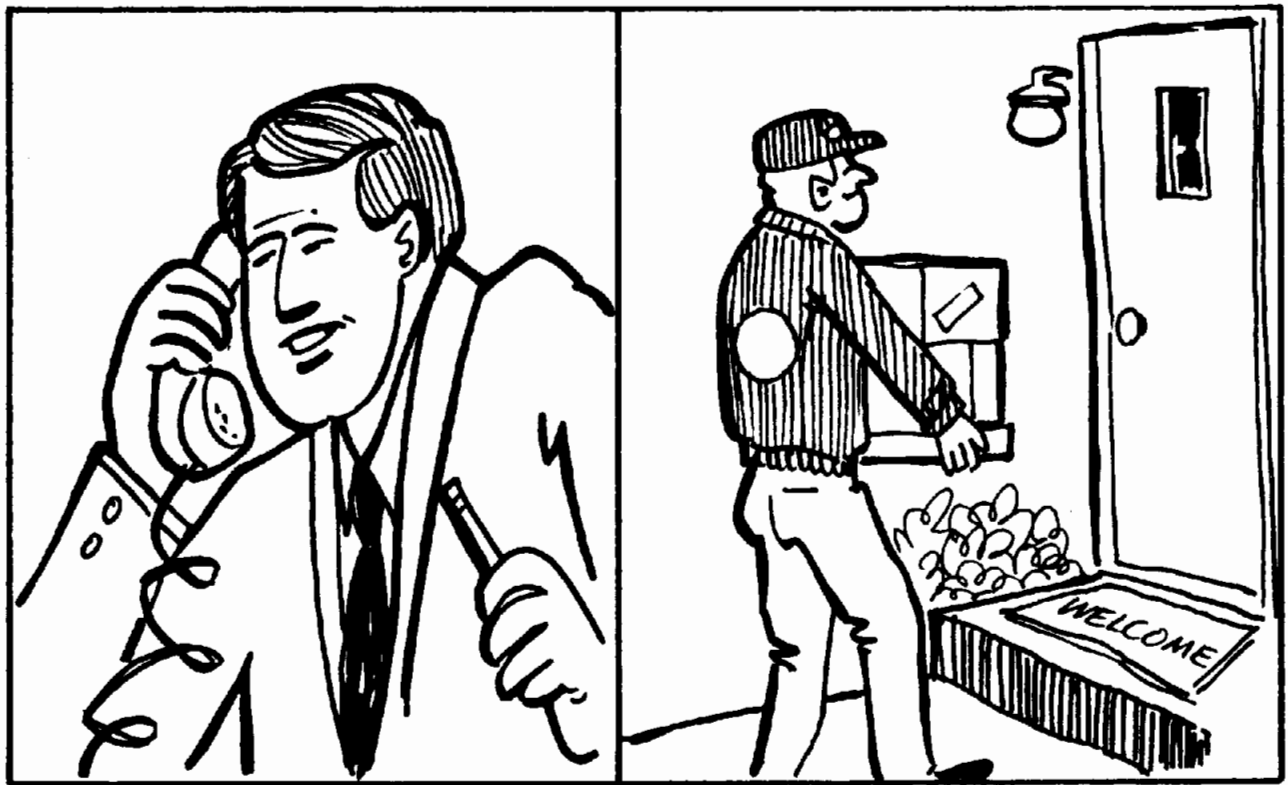
This manual is designed to discuss these problems. For persons who are long-time supervisors of volunteer programs, some material will be familiar. Nevertheless, the transportation area presents some special problems.

The learnings on which this manual is based come from many persons who were interviewed and who shared their experiences. Several of the books listed in Chapter IV were very helpful. The Bureau of Mass Transit of the Tennessee Department of Transportation supported the study and did some of the interviewing. Of course, any errors that remain in the manual are the responsibility of the authors.

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WHY A VOLUNTEER TRANSPORTATION PROGRAM?



I. WHY A VOLUNTEER TRANSPORTATION PROGRAM?

Does an Agency Need a Transportation Program?

Before any agency starts a transportation program of its own, the director or some other responsible person should ask if a transportation program is needed. All agencies need access for their clients. The question is whether or not adequate means of access are available in the community served. To answer this question, the agency needs to examine the routes, schedules and policies of various providers in the area. Available bus service should be examined as well as any policies which might provide discounts or special services for clients such as elderly, low income or handicapped individuals. Plans to make bus service more accessible to special groups may have been implemented. Taxi service or some form of demand-responsive service may be available. Some communities, such as Oak Ridge, Tennessee, subsidize taxi riders through a reduced fare coupon plan. Other agencies may operate transportation programs with unused capacity which can serve client needs. Finally, a specialized transportation program or agency may exist in the community.

Autonomous transportation programs deserve a special word because they can provide economies of scale, can reduce duplication of effort, can eliminate unused capacity and can coordinate with other programs for the disadvantaged. Such programs define their mission as transportation and exist to serve the needs of cooperating programs. Their budgets come from the funds allocated to transportation by cooperating programs, becoming contract providers for the cooperating agencies. Sometimes these autonomous programs originate from combined organizing efforts of existing agencies. Sometimes such programs are

an idea that catches on with one sponsoring group, such as the Junior League or other service-oriented civic association.

After the availability of other transportation programs to serve client needs has been evaluated, the decision to start a transportation program should examine several other questions. If no existing transportation program is adequate to meet client needs, how many clients require additional service? In considering services needed, both client characteristics and trip characteristics should be considered. Client characteristics should include any transportation-related handicap, such as inability to climb steps to board the bus. Ability to drive and access to a car should be included. Trip characteristics often are related to trip purposes. Work trips are regular and frequent, and time of departure is known in advance. Medical appointment trips are both regular and irregular but can be scheduled in advance. However, medical appointment return departure times can be less certain. Emergency trips, by definition, are unscheduled. Visits with friends are scheduled during traditional leisure hours, weekends or evenings.

Transportation services are differentially available for meeting such needs as those described immediately above. Once the nature and extent of the need that is not met by existing providers has been determined, an informed decision on whether or not to establish a transportation program can be made. Transportation programs are expensive to operate, particularly if only a few persons use them. Often insufficient records are kept to calculate accurately how costly the program is. In short, while clients must have transportation, that transportation should be the most economical service available with an acceptable level of quality.

Should an Agency Use Volunteers in Providing Transportation?

Once an agency decides to establish a transportation program, another decision must be made. Should volunteers be used in providing the service? The answer from the research performed for this handbook is an emphatic Yes! But there are some qualifications.

The best reason for using volunteers is that use of volunteers can save money. This is true particularly when volunteers donate their vehicles, the money to operate the vehicles and their time as drivers. In this instance, the only costs are the cost of administering the program (scheduling requests and dispatching volunteers), additional insurance that the agency takes out to protect volunteer drivers and clients, and the incidental expenses associated with the customary recognition banquets and/or token awards that constitute the volunteer maintenance of most volunteer programs. These few costs can be relatively expensive if the volume of requests for transportation is high; but they are still small compared to total costs since the cost of using volunteers does not involve vehicle depreciation, vehicle maintenance, driver salary, fuel or (often) basic insurance. Reimbursement for mileage or partial reimbursement such as for fuel are found in some programs; reimbursement costs less than agency-operated vehicle programs with volunteer drivers.

A second advantage is that volunteers can improve client relations. As long as volunteers are given tasks for which they are trained (basic driving) and clients they can help (an escort, if needed), volunteers are motivated to perform services for the clients. Many agency directors see the desire to serve the client population as an important aspect of the motivation involved. Further, agencies sometimes match a given client and a volunteer on a continuing basis. Such matching encourages the formation of friendly helping relationships

which improve agency-client relations. Through providing a personal touch and establishing a gift relationship with clients, volunteers serve as excellent representatives of the agency.

Two major disadvantages limit the usefulness of volunteer programs. The first is the limited schedule availability of volunteers. Several successful volunteer programs limit themselves to trips which can be scheduled several days in advance and between 8 a.m. and 5 p.m. on weekdays. The reason for such limitations is that it allows the agency to schedule services when volunteers are available. Volunteer drivers are available at their convenience during their "free" time, not during the agency's hours of operation or on emergency call. Thus, the trip purposes for which volunteers may be used most effectively are those which can be scheduled in advance, during the daytime hours and when fill-in or backup drivers are available. Some agencies note that volunteers are not as reliable as paid employees and that no-show problems occur.

A second general disadvantage is having too few volunteers to meet the demand. Since transportation is such an important and pressing need, requests for transportation are likely to outstrip the volunteers' ability to provide that transportation--in short, there may not be enough drivers and/or vehicles available. This has led several volunteer programs to document their unfilled requests. Such documentation provides a basis for recruiting new volunteers and for getting more funding for the program. Such documentation can form the basis for setting up a specialized transportation service.

How Can Volunteers Be Used in a Transportation Program?

There are a number of ways to divide the work of the transportation program as it increases in size. A small program answering only one or two requests per day is very different from a program answering ten requests per day, which in turn is different from a program answering 100 requests per day.

Since few agencies operate a fixed-route, fixed-schedule transportation service staffed by volunteers, the first point of contact between agency and client will occur when the client contacts an agency staff member to schedule a trip. Since calls for the service may arrive at anytime the agency is open for business, arrangements must be made to staff the position continuously. Shifts of volunteers or paid employees may be used. Once the request has been taken, the request must be matched with an available source of transportation. This job may be combined with that of scheduler or may be assigned to persons who match different requests and develop a route for the agency vehicle or volunteer driver to follow. This assignment or dispatching function does not require continuous availability and can be handled by volunteers, if the volume is not too heavy and if an easily mastered system of matching clients and means of transport has been developed. The position of record keeper for the agency transportation program is probably the least desirable position for volunteers, because record keeping involves developing accurate records and coordinating various reports from the drivers and other portions of the transportation program.

The two most common uses of volunteers in transportation programs are as drivers and as escorts. Both of these tasks are well suited to the use

of volunteers since neither requires much continuity of knowledge from one part of the task to the next. Drivers are interchangeable with other drivers of the same skill level. Escorts are interchangeable with other escorts. This is particularly true if drivers are supplied with route information as well as addresses of clients and their destinations. When volunteer drivers are supplying their own vehicles, their interchangeability is increased because lack of experience with a particular type of vehicle will not be a concern. Escorts who have been trained to work with particular types of clients--for example, those having passenger assistance training--will be less interchangeable than escorts who are simply available as a means of passenger control as with mentally handicapped children.

In summary, volunteers can be used successfully in any transportation system provided:

1. The volunteers are trained;
2. The work of the volunteers is well planned and coordinated;
3. Volunteers are not asked to do work for which they are untrained;
4. Scheduling of the work of the volunteers is agreed upon in advance; and
5. Volunteers are assigned to those jobs which require a small amount of continuity of knowledge.

Having Decided to Use Volunteers, Does an Agency Need a Director of Volunteers?

The answer to this question is an unqualified Yes! Many of the past failures of voluntary efforts within social service agencies have been due to lack of effective leadership and its concomitant organizational problems (e.g., inadequate supervision and training of volunteers, staff resistance, apathy and lack of goals and objectives). All too often, social service agencies regard the

management of their volunteer programs or services as a low priority task. The job of managing voluntary efforts frequently is delegated to any staff person having free time. Thus, the job of director or coordinator of volunteers (if the title is even employed) is usually a part-time job, filled by a person with little, if any, training.

It is imperative that social service agencies recognize that effective leadership is crucial to the success of any volunteer program. The director of volunteers, as the manager of the volunteer program, plays many significant roles with diverse responsibilities (decision maker, recruiter, mediator, record keeper, planner, organizer, disciplinarian, etc.). The diversity of the roles attached to this job requires a wide, interdisciplinary range of skills and knowledge. The haphazard assignment of an untrained staff member with little commitment to this job can be destructive for the agency, the clients and the volunteers.

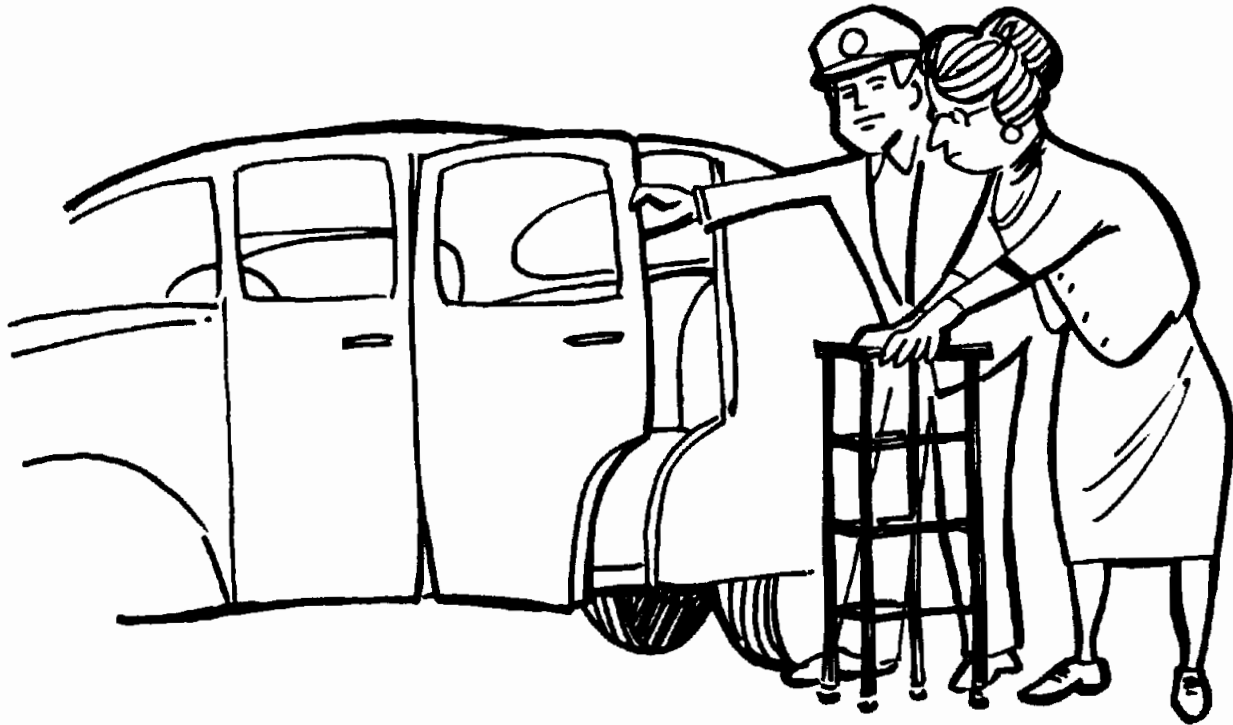
In the last decade social service agencies have witnessed the growth of a new administrative position, the director of volunteers. Until the last decade, directors of volunteers or managers of volunteer programs have had very few resources to draw on in order to execute their job effectively. However, the last decade has seen the growth of many valuable resources (national volunteer associations and resource organizations; college and university courses and degrees in volunteer administration; books and journals on the recruitment, training and supervision of volunteers; conferences and workshops for directors of volunteers; etc.). (These resources are discussed in Chapter IV.)

Large voluntary organizations frequently have a director of volunteers with subordinate volunteer coordinators for their various programs. In such

cases, the director of volunteers is responsible primarily for long-term planning; recruitment, interviewing and placing of volunteers; and coordinating the efforts of the volunteer coordinators. Volunteer coordinators are responsible primarily for short-term planning and supervising the volunteers assigned to their programs. Social service agencies which utilize a large number of volunteers may want to adopt a similar organizational scheme. For example, those agencies which have transportation programs may find it beneficial to have both a director of volunteers and a director of transportation volunteers.

Regardless of the type of volunteers being directed, the director of volunteers, like any manager, has five main tasks--planning, staffing, directing, record keeping and evaluation. (These functions are discussed in Chapter III.)

CHARACTERISTICS AND PROBLEMS OF A VOLUNTEER TRANSPORTATION PROGRAM



II. CHARACTERISTICS AND PROBLEMS OF A VOLUNTEER TRANSPORTATION PROGRAM

The volunteer transportation program has a number of characteristics which should be considered before organizing and beginning to operate a program. Some of these are characteristics of transportation programs, and others are problems unique to volunteer programs.

Characteristics of a Volunteer Transportation Program

Tasks Related to Operation. Tasks may be delegated to different persons or to the same person; but in programs where vehicles are volunteer-owned, three basic jobs must be performed. These are: (1) receiving the request and matching the request to an available driver; (2) transporting the client; and (3) making records of both requests and trips. When the agency owns vehicles, additional tasks include vehicle maintenance, vehicle records and replacement of vehicles. As programs increase in size, specialization of personnel may increase. Even in the smallest programs, different persons usually record the request and transport the client.

Most agencies that own only a few vehicles will want to establish maintenance programs with an auto repair shop rather than employing their own mechanic. However, routine checks of vehicle maintenance are particularly important in a vehicle driven by many different drivers. Preventive maintenance schedules should be established, and a chart should be kept with the vehicle to ensure regular preventive maintenance (e.g., lubrication, oil changes, filter changes, tire pressure).

Coordination of Transportation Services Between Suppliers. Coordination of services is an important aspect of all transportation programs. Some volunteer programs may wish to take clients to an intercity bus where they

will be transported between cities and to meet a returning bus to return them to their homes. Such a strategy as this, when coordinated with an existing bus schedule and with a program in the destination city, could save substantially on costs in driver time and mileage. The coordination of such a trip requires establishing contact with the bus line and with an agency in a destination city. The agency in the destination city would provide a volunteer to meet the bus and to transport the client to a final destination, such as to some therapy or treatment. This example illustrates the two types of contacts often made by volunteer programs with other suppliers. These contacts are only one aspect of coordination of transportation services.

Another example would be where an agency uses funds from its budget to support a transportation specialty program. Some transportation programs using volunteer drivers and vehicles receive support for their paid staff (e.g., director, dispatchers) from funds contributed by other social service agencies. Such a specialized transportation program can be particularly beneficial for smaller social service programs that cannot afford to fund a transportation program of their own and yet require more transportation or larger vehicles than their volunteers can provide. Agency-operated transportation programs should always be evaluated in terms of the possibilities of setting up a cooperative volunteer transportation program to service all the needs of the area in question.

The practical mechanics of consolidating agency or program-operated transportation services in a given community are as follows. First, suppliers of transportation services within the community should set up a meeting where they describe their transportation programs and their clients' needs for transportation. Second, a person should be appointed to determine which services

are duplicated, which agencies or programs appear to have excess capacity and the problems and prospects for setting up a cooperative program. Subsequent meetings would explore the organizational structure of a cooperative transportation agency as well as possible services to be offered and potential funding. (An example of a cooperative transportation program is Wheels, Inc., of Philadelphia, Pennsylvania. Appendix A describes the program.) Even if such a group meeting does not produce an effort to establish a specialized transportation service, the meeting could result in arrangements between specific agencies or programs to service one another's clients.

Keeping Records of Transportation Services. Keeping records of the number of filled and unfilled requests for service indicates the need the program is filling and the demand for its services. Records on vehicle occupancy and on mileage during trips provide estimates of productivity and cost of providing the service. Records of paid staff time devoted to training, scheduling, coordinating and rewarding the work of drivers are important in calculating the cost of programs as well. Insurance companies are interested in accident records, safety records and amount of absenteeism and turnover among drivers. Training program records provide arguments for reducing rates because of increasing knowledge of safe driving practices. Record keeping on vehicles is, as noted above, an important aspect of preventive maintenance which reduces the out-of-service time for vehicles and increases vehicle service life. Record keeping may be rather simple or complex depending upon the system's needs. Some suggestions for types of records and methods of keeping them appear later in the report.

Insurance. All transportation programs should carry insurance to protect themselves, their drivers and their passengers. The type of insurance needed will vary with the type of transportation programs and with vehicles used.

Agency owned vehicles will need protection. Several reports on insurance for transportation programs are available. One such report is Frank W. Davis, Jr., et al., The Social Service Insurance Dilemma: Problems, Analysis and Proposed Solutions, Washington, D.C.: Office of University Research, U.S. Department of Transportation. (This report is available through the National Technical Information Service, Springfield, Virginia 22161.) Social service agency transportation programs present special problems due to the characteristics of their clients and their lack of training in the transportation area. Prior to work stimulated by the Surface Transportation Act of 1978, some agencies experienced difficulty in obtaining insurance for their transportation programs. All states now have reviewed insurance in this area, and rates for such programs are being established by state regulatory boards in cooperation with the insurance industry.

In addition to insurance on vehicles, agencies should provide add-on insurance for volunteers using their own vehicles in transporting clients. Research has shown that reimbursement of volunteers and the recent interpretations of good samaritan and guest statutes* are not sufficient legal protections for the volunteer-client relationship. Therefore, adequate liability insurance must be obtained to add on coverage to the volunteer's own policy. (Such coverage is usually quite inexpensive.)

Marketing/Publicizing. Transportation programs take for granted that they are providing a needed service. Often they operate by the principle that if they provide a needed service, clients will come to them. On the contrary, to quote another common saying, "It pays to advertise." Transportation programs are increasingly aware that they provide service for definable segments of the

*Guest statutes are laws which have protected the driver from liability for a passenger riding voluntarily as a guest.

population. Sometimes these segments of the population know of the availability of service; more often they do not. The objective of the marketing program is to make the service known to the segments of the population who are eligible for and in need of the service. Simply establishing a transportation service in response to an expressed need is not enough. Relying on word-of-mouth recommendations is not enough. What is required is both identifying the clients in need and developing a set of techniques to explain the service and the way it works. Other agencies and voluntary associations of clients may provide such communication channels, or a variety of standard marketing techniques may be used.

Funding Sources. Funding sources are a continual problem for agency-based transportation programs. Some funding programs sources and problems are discussed in Market Opportunity Analysis for Short Range Public Transportation Planning: Transportation Services for the Transportation Disadvantaged, National Cooperative Highway Research Program Report 209, Washington, D.C.: Transportation Research Board, 1979. As a general principle, transportation funds for operation should be obtained from local sources, if possible, since local funds often are more stable. Funds for purchasing and operating vehicles are obtainable through grants from the federal government. By building transportation funds into the local program budget, rather than by deriving them from state or national grants, the stability of the transportation program is improved.

Special Problems with the Use of Volunteers

The second section of this chapter deals with the special problems involved in using volunteers in transportation programs. This list of problems is not meant to be all inclusive but merely to highlight some problems of special concern. Chapter III gives a comprehensive treatment of problems facing the person organizing a volunteer transportation program. Here, four areas of

potential problems are highlighted to alert those persons interested. The reader will find suggested solutions as well.

Coordination of Volunteers with Staff. Two aspects of this problem exist. Job assignments present a major problem if the volunteer transportation worker does not understand the limits of her/his training and capability. Staff must understand what the volunteer driver is trained to do. A driver inexperienced in handling a van should not be asked on the spur of the moment to perform this task. If all staff members involved with a volunteer transportation program are not sensitive to the contract or job definition that has been negotiated with each volunteer, problems for the volunteer and/or program can result. Another important aspect of coordination in the job definition area is the question of when and how volunteers should be assigned to do work that staff perform as well. This is a matter which must be handled quite carefully, since it puts the volunteer in the position of being compared to the paid staff person. Fill-in assignments for paid staff can be taken by volunteers who are qualified to do the work, but the director of the transportation program should be sure to clear the matter by checking the contract and by talking with the paid employee if possible. An example in the transportation area would be substituting a well-trained volunteer bus driver for a staff bus driver.

According to the study of agencies in Tennessee that use volunteer drivers, one of the problems with volunteers which occurs with some regularity is scheduling. Coordination of volunteer delivery of clients to programs or of goods to clients may require reserve drivers who can be called on in the event that a volunteer must cancel or fails to show. Emphasis should be placed on encouraging volunteers to call in advance if they cannot fulfill an assignment. An alternative solution is to have a list of qualified volunteer drivers available and ask the volunteer to make and report alternative arrangements in the

event that they cannot fill an assignment. This solution has the advantage of encouraging conversations and relationships among the volunteer drivers.

Record Keeping for Volunteers. The second major problem area in volunteer transportation programs is record keeping. Currently several important studies are going on in the record keeping area. The section on directing the volunteer program found in Chapter III describes how best to keep records. Further information may be found in Frederick J. Wegmann and Arun Chatterjee, Rural Transportation Record Keeping: Problems and Opportunities, Knoxville: Transportation Center, The University of Tennessee, 1980 (available from the Bureau of Mass Transit, Tennessee Department of Transportation, Nashville, Tennessee 37219); in John Lai and Pat Mooney, Human Service Agency Transportation Service in Pittsburg, California, Sacramento: Caltrans, May 1977; in Michigan Small Bus Program System Management Handbook, Washington, D.C: U.S. Department of Transportation, June 1978; and in Frank W. Davis, Jr., et al., Driver Selection and Training for Human Service Agencies, Washington, U.S. Department of Health and Human Services, forthcoming (see page 51 for details).

When volunteers are used, the time and money which they contribute to the program can be used to match funds from granting agencies. To do this, accurate records should be kept not only of time spent by volunteers but also of the donation of the costs of operating their vehicles if the agency does not reimburse for mileage. Volunteers are often safe drivers; however, this must be documented for insurance companies and their representatives. Volunteer programs do cost the agency something to operate in terms of administration, training and award programs. Often administrators are not able to document how much time they spend with volunteers.

Client characteristics are another area where records may be needed for funding purposes, since some grants to agencies are for servicing a particular portion of the population. In addition, records of client characteristics such as particular handicaps and frequencies of requests for service by persons with particular handicaps can reveal the need for training volunteers in certain skills, such as Passenger Assistance Training.* An analysis of types of trip purposes may be important for funding agencies since some funds are tied to trip purpose rather than client characteristics.

Volunteer transportation programs may be classified as trip purpose oriented or as client oriented. These programs may be located within an agency which is a general purpose or multipurpose organization, or they may be housed within a program or agency which is oriented toward the needs of a particular client group. Figure II-1 illustrates these distinctions. Record keeping needs (as well as other organizational problems) vary for the four different types of transportation programs. The budget for transportation, varies with different types of agencies. Client oriented agencies may have a single transportation budget, with the funds from different programs. Function oriented agencies may have transportation as a budget item in each of several programs. Recognizing the four types of programs is an important first step in the consolidation of programs within the agency as well as in coordination of transportation needs with other agencies. Even though agencies differ in their definition of mission, they may discover possibilities for cooperation when trip purposes are similar and/or when clients are similar. The important thing in both record keeping and cooperation is recognizing the areas of similarity of transportation services provided.

*This is the name of a specialized training program designed to show how to load and unload persons with physical disabilities and persons in wheelchairs. For details contact William H. Henderson, Management Service Associates, Austin, Texas.

Transportation Programs¹

		Trip Purpose Oriented and/or Funded	Client Characteristic Oriented and/or Funded
Agency or Program Type ²	Function Oriented ³	Red Cross Meals on Wheels	Educational Transportation for Mentally Retarded
	Client Specific	Medical Trips for Welfare Clients	Various Trips for Senior Citizens; Easter Seal Society Trips for Handicapped

1. Transportation programs often receive their funds based on the clients which they serve (e.g., elderly), or they receive funds based on filling the need for a particular trip purpose (e.g., medical trips, nutrition).
2. Agencies or programs may be divided into those which limit their clients on the basis of the need for a particular service or services (e.g., the Red Cross, Meals on Wheels, family planning) and those which restrict their services to a particular client group (e.g., United Cerebral Palsy, Easter Seal Society, senior citizen centers, Boys Clubs).
3. Both multifunction and single function agencies and programs are included in this group.

FIGURE II-1

TYPES OF TRANSPORTATION PROGRAMS

Insurance on Volunteers. Insurance for volunteer drivers and escorts has been a problem in the past, but this is being handled now in a variety of ways. The insurance industry and state governments have been reviewing insurance needs across the country in relation to the Surface Transportation Act of 1978. This review has resulted in establishing rates for insuring agency operated vehicles which can be obtained from a local agent. Several companies such as Insurance Company of North America offer add-on packages to increase the coverage for volunteer drivers while they are carrying passengers or making deliveries of goods for the agency. Check with an agent for more details.

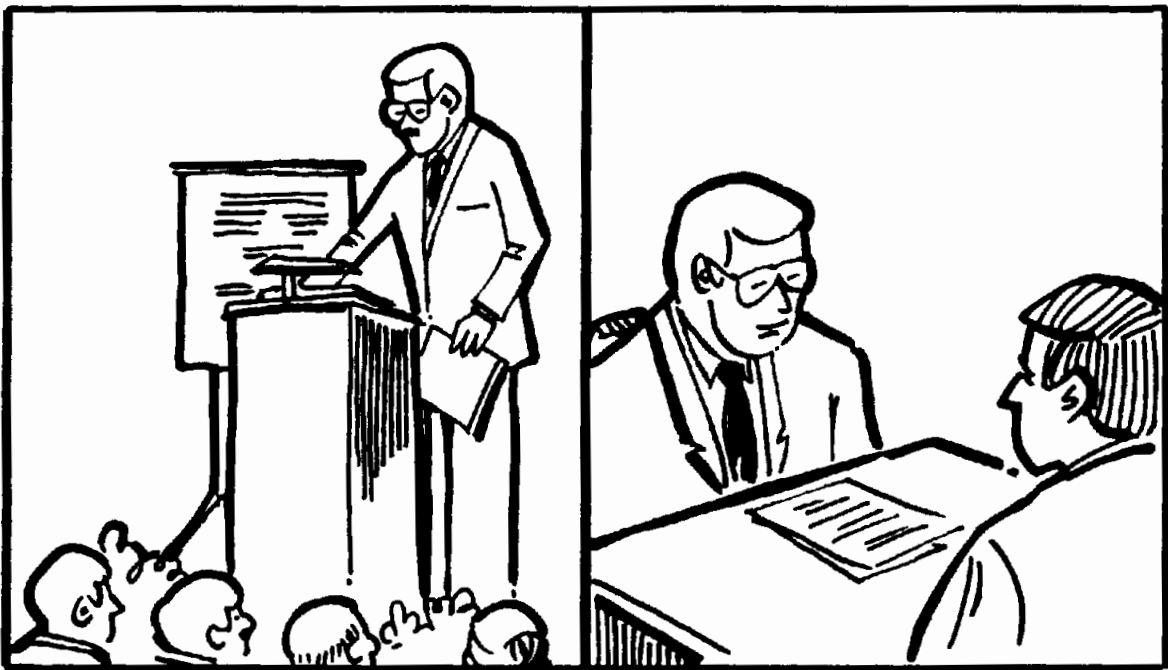
Legal Questions. Several legal questions confront agencies using volunteers. These questions are mainly in the area of liability. This is treated more systematically in David A. Burkhalter, "Improving Transportation Services for the Disadvantaged Through Volunteer Programs," Knoxville: Transportation Center, the University of Tennessee, undated. Agencies should understand that guest statutes no longer protect the volunteer and the agency from liability. Suits against agencies that show negligence in adequately screening or training drivers may result in agency liability in the case of accidental injury or death of clients. Adequate driver selection and training programs are very important as a way of protecting the agency against such proceedings.

Summary

This chapter has reviewed briefly areas which cause concern for transportation programs for the transportation disadvantaged and for transportation programs which use volunteer drivers and/or escorts. Problem areas for transporting the disadvantaged included tasks related to operation, coordination of transportation services between suppliers, keeping records of transportation service, insurance, marketing/publicizing and funding sources. Special problems

in the use of volunteers were coordination of volunteers with staff, keeping records for volunteers, insurance on volunteers and legal questions in the use of volunteers. This chapter included a typology of transportation programs in agencies which will help an agency to identify similarities between programs within the agency for accounting and planning purposes and to identify similarities between the agency's programs and those of other agencies for the purpose of stimulating interagency cooperation in providing transportation services.

HOW TO ORGANIZE A VOLUNTEER TRANSPORTATION PROGRAM



III. HOW TO ORGANIZE A VOLUNTEER TRANSPORTATION PROGRAM

This chapter examines five essential tasks in organizing and maintaining volunteer transportation programs--planning, staffing, directing, record keeping and evaluation. This chapter borrows heavily from and is deeply indebted to the valuable research and experiences of experts in the field of volunteerism--Ivan H. Scheier, Marlene Wilson, Harriet Naylor, Bobette W. Reigel, Anne K. Stengel and Helen M. Feeney. (See the publication section of Chapter IV for works by these authors.)

Planning

One of the basic functions of any director or manager is planning. Planning is the means of carrying out an agency's goals and objectives. Before any program is launched, be it a transportation program or otherwise, plans should be developed carefully.

Planning for social service agencies often involves an assessment of both organizational and client needs. This is particularly crucial in planning transportation programs. Before agencies plan transportation programs, they should identify their clients' transportation needs. Agencies need to know which and how many clients cannot use other available means of transportation, what types of disabilities they have, what types of assistance they need (wheelchair lift, etc.), for what purposes they need transportation, what times of the day transportation is needed (Are there peak periods of demand? Do they need transportation after normal working hours?) and what type of vehicle they are able to use (sedan, van with lift, etc.).

This assessment of the transportation needs of their clients should enable agencies to determine the number and type of vehicles as well as personnel required to meet these needs. Having made this determination,

agencies should identify various funding sources, both those which provide funds for mileage reimbursement and those which provide funds for the purchase of vehicles and equipment.

An important factor to take into account when examining these funding sources is their stability. As noted in Chapter II, stable, long-term financial support for transportation programs traditionally has been a problem for social service agencies. While federal funds are more abundant, they tend to be short-term. Furthermore, regulations regarding use of federal funds may limit transportation services to only a few trip purposes and may restrict the coordination of transportation at the local level. More localized funding sources tend to be more stable and less restrictive.

Properly trained and supervised volunteers have proven to be a dependable, cost-effective and efficient source of manpower for transportation programs. They have been used successfully to augment staff in dispatching, scheduling, record keeping, driving, delivering services and attending clients who need assistance in transit.

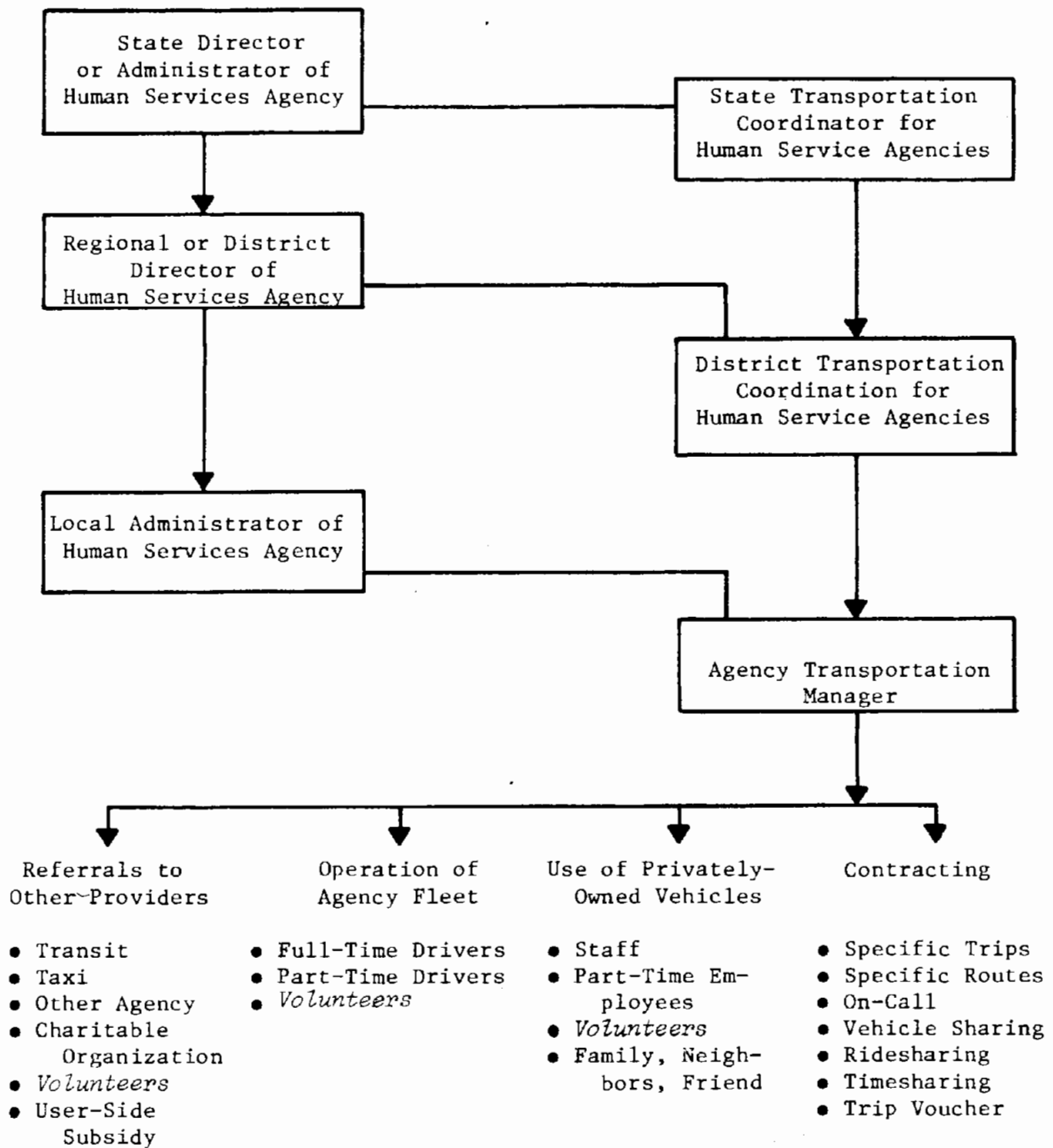
Remember that each transportation program is different in some way. Some programs provide a high volume of service, while other programs provide a low volume. Some programs' clients are severely disabled, while other programs' clients are ambulatory. Some transportation programs offer a fixed-route service, some a demand-responsive service, while others offer a combination of the two. Because of these differences, the duties and knowledge required for different transportation jobs (i.e., dispatcher, scheduler, driver, etc.) may vary widely from program to program. Not only do these jobs vary, but the ability to fill these jobs with volunteers also varies, and it depends on the community's pool of volunteers, i.e., their abilities, skills and knowledge.

The variability of program needs makes consultation with the person responsible for the agency's transportation program essential. In Figure III-1 Davis' proposed organizational model shows that volunteers can be used as providers within the agency (through the use of their own or agency-owned vehicles) or through volunteer programs outside the agency. Early in the transportation planning process, the agency must decide how and to what extent volunteers will be used to provide client transportation. The way(s) in which volunteers are used will influence how the director of volunteers writes job descriptions and supervises the work of volunteers.

Staff Involvement. The involvement of volunteers in any program requires, at least initially, extra time, effort and commitment on the part of the staff. Typically, social service agency staff are already overburdened with duties and responsibilities. Under these conditions, staff may be resistant to the active involvement of volunteers.

Staff resistance and lack of staff acceptance or support can lead to the early failure of volunteer programs. Therefore, staff participation should be solicited in every phase of the volunteer program, from planning to evaluation. In planning for the active involvement of volunteers in any program, staff should be involved in the design of volunteer jobs. This will help ensure that volunteer jobs will be time-saving rather than time-absorbing for staff. This inclusion of the staff in the initial planning stage also will help to create the feeling among staff members that the volunteer program is their program, designed for their assistance.

If a staff member will be working with a particular volunteer, the staff member should be involved in developing the job description, selecting the volunteer used and training the volunteer. While the supervising staff member may not



Source: Frank W. Davis, Jr., et al., Driver Selection and Training for Human Service Agencies, Washington, D.C.: U.S. Department of Health and Human Services, forthcoming.

FIGURE III-1

ORGANIZATIONAL MODEL FOR HUMAN SERVICE TRANSPORTATION COORDINATION

complete any of these stages alone, the staff member's involvement ensures better satisfaction with the volunteer and provides feedback to the person(s) primarily responsible for these aspects of the program.

Job Descriptions. An essential task in organizing any volunteer program is the development of job descriptions. Clearly defined duties and responsibilities are a key to successful use of volunteers. Job descriptions outlining duties and responsibilities should be developed before recruitment and should be used in recruitment and given to the volunteers at the time of assignment.

Each job description should be precise and concise. It should contain (1) a descriptive title, (2) name and title of supervisor, (3) a statement of duties, (4) time required to perform job, (5) qualifications or skills needed and (6) training provided by the agency. Figure III-2 provides four examples.

Staffing

Recruitment. The characteristics of volunteers changed in the 60s and 70s. Typical volunteers are no longer middle-aged, unemployed, middle or upper class women. The age range of volunteers has increased. Student volunteers and senior citizen volunteers now comprise a larger proportion of the volunteer work force than in the past. A broad cross section of society is volunteering. Retired professional people, blue-collar workers, office workers, the poor and clients have been added to the list of those volunteering. Because of these changes, a wider range of skills, talents and expertise is available to social service agencies utilizing volunteers. Nevertheless volunteers are more common among those with high education and annual household incomes of at least \$20,000, according to the Gallup Poll in Voluntary Action Leadership (Winter 1982 issues).

TITLE: Transportation Telephone Aide

RESPONSIBLE TO: Ms. Jane Smith, Director of Transportation Volunteers and
Mr. Mark Aide, Scheduling Supervisor

DUTIES: Answer telephone request for transportation. Keep records of
requests and confirm transportation appointments.

TIME REQUIRED: One afternoon (1:00 to 5:00) per week.

QUALIFICATIONS: Pleasant phone personality, legible handwriting.

TRAINING PROVIDED: An orientation session to acquaint volunteer with the
agency's goals and objectives. A short training session
on record keeping. Two hours of on-the-job training.

TITLE: Volunteer Transportation Recruiter/Speaker

RESPONSIBLE TO: Mr. Jack Jones, Director of Transportation Volunteers

DUTIES: Assisting Mr. Jones in recruiting volunteers for various transporta-
tion jobs by giving assigned speeches and/or presentations to various
service organizations, churches, clubs and other community groups.

TIME REQUIRED: 4 to 6 hours per month. Interested groups generally will
meet over lunch or dinner.

QUALIFICATIONS: Public speaking, enthusiasm, belief in the value of volunteers,
and a commitment to the agency's goals. Contacts with community
service clubs, organizations and churches will be valuable.

TRAINING PROVIDED: Volunteer will be thoroughly acquainted with the goals
and objectives of the agency and its volunteer program.
Volunteer also will be taught how to operate visual aide
equipment.

Note: These job descriptions follow the design suggested by Marlene Wilson in
The Effective Management of Volunteer Programs, Boulder, Colorado:
Volunteer Management Associates, 1976.

FIGURE III-2

JOB DESCRIPTIONS

TITLE: Special Transportation Escort

RESPONSIBLE TO: Mr. Roger Black, Scheduling Supervisor and Ms. Elaine Pot,
Entertainment Coordinator

DUTIES: To assist in special group trips involving the elderly and/or handi-
capped. Assisting includes helping clients in boarding and unboarding
and helping Ms. Pot in coordinating the group's activities. Assists
in planning outings or other group activities for clients.

TIME REQUIRED: Approximately four hours per month. Special group trips vary
in length and may occur on nights and on weekends.

QUALIFICATIONS: Physically able, patient, pleasant personality. Experience
with elderly helpful but not required.

TRAINING PROVIDED: Orientation session to acquaint volunteer with agency's
goals and objectives. Training in passenger assistance
and in use of vehicles special equipment. On-the-job
training with another escort.

TITLE: Driver (own vehicle)

RESPONSIBLE TO: George Coffee, Director of Transportation Volunteers

DUTIES: Transport clients who can enter a car without assistance to their
destination and back in your own car. Follow schedule of trips pro-
vided and keep records of mileage traveled for reimbursement.

TIME REQUIRED: One afternoon 12:30 to 4:30 or one morning 8:30 to 12:30 per week.

QUALIFICATIONS: Valid driver's license, no accidents in last two years, good
health, ability to pass agency's driving test, vehicle in
good condition.

TRAINING PROVIDED: Defensive driving course, how to relate to clients, orienta-
tion session on agency goals, purpose and organization,
first-aid course.

FIGURE III-2 (continued)

An often overlooked group in recruitment is clients. Clients benefiting from an agency's transportation program are aware of just how important such a program is and may be eager to help in any way possible, e.g., dispatching, scheduling, escorting and answering the telephone. This opportunity to volunteer decreases their isolation, a characteristic of the transportation disadvantaged, by increasing their interaction with others and by giving them the opportunity to develop friendships outside of their previous narrow range of family and neighbors. Furthermore, because they are doing something meaningful, they are able to develop an increased sense of self-worth and pride.

Families and relatives of transportation disadvantaged clients are also a good recruiting source. Because of their relationship with the client, they are aware of the problems and needs of their relative and other similarly disadvantaged persons. Furthermore, they have gained the basic skills needed in handling the problems and needs of this particular client group.

A key to effective recruiting is creativity. A variety of recruitment techniques should be used.* Some suggestions are:

Volunteer Bureau, Voluntary Action Center, Retired Senior Volunteer Program

Written job descriptions should be submitted to any of these agencies serving the community.

Volunteer opportunity advertisements or weekly features

In some areas, local newspapers carry volunteer opportunities as a weekly feature. A coalition of agencies may be successful in this approach with the local newspaper editor or may be successful in establishing a "Volunteer Opportunities" column in the Sunday addition of the classified advertisements.

Newspapers

News releases on the program's volunteer accomplishments and needs should be developed.

*These recruiting channels may be used to advertise the availability of the service as well.

Radio and television

Agency officials should participate in interview or talk shows. Public service spots (free) should be run. These sources should be made aware of human interest stories involving volunteers.

Person-to-person contact

Staff, volunteers and clients should be encouraged to recruit on a one-to-one basis. This is the most successful form of recruiting.

Newsletters

Volunteer news articles should be featured in an agency's newsletter.

Brochures and other printed material

Any printed material advertising an agency or any of the agency's programs should have an appeal for volunteers. If funds are available, an agency should have a separate brochure on volunteer activities.

Displays

If an agency has educational displays at local fairs, shopping centers and/or conferences, part of that display should be devoted to volunteer recruitment. Handouts on current volunteer opportunities could be made available.

Presentations and speeches

Recruitment talks to church groups, service clubs, professional organizations, etc., should be given.

Welcome Wagon or other welcome organizations

Volunteering is an excellent way of getting to know and becoming involved with a new community. Materials on an agency's program and its volunteer job descriptions should be distributed through local welcoming organizations and groups.

Interviewing, Selecting and Placing. The task of interviewing and selecting a volunteer for a particular job should be taken seriously. Agencies are under no obligation to accept anyone volunteering services, nor should they want to do so. Selecting volunteer drivers and escorts requires particular care. Some volunteers may do more damage than good--damage to the agency's reputation, to the clients and to volunteer/staff relations.

The interview/selection process acts as a quality control mechanism. Any volunteer program should be as sound as the agency of which it is a part.

Only suitable volunteers with appropriate skills and qualifications should be selected. Those clearly unsuited should be screened out and, if possible, redirected toward jobs in which their particular qualifications or skills can be used.

Before or during the interview (preferably before to save interviewing time), volunteers should be given the opportunity to look over the agency's written job descriptions. This will enable them to match their skills and interests with particular job options.

During the interview, the need for reliability, punctuality, responsible behavior and observance of agency policies should be stressed and agreed upon. The duties and responsibilities of the jobs should be defined clearly and discussed.

Selection of drivers requires particular care if accidents are to be minimized. The report, Driver Selection and Training for Human Service Agencies, by Frank W. Davis, Jr., et al., Washington, D.C.: U.S. Department of Health and Human Services (forthcoming, see p. 51) suggests that the following criteria be used as standards for evaluation:

1. The driver should have four or more years of driving experience.
2. There must be no alcohol and/or drug abuse.
3. Applicants should have full use of both arms and legs and should not be subject to chronic conditions such as epilepsy, diabetes and heart problems which might cause a sudden loss of control. However, management should use functional age rather than chronological age as a yardstick.
4. The driver must have a good driving record with few violations and accidents.
5. The driver must have a stable job history. Frequent job changes have been associated with poor driving performance.
6. The driver must have a willingness to absorb training and directions and a commitment to the mission of the agency. Hence, the following personality profile emerges. The driver must be:

- a. patient with children;
- b. emotionally stable--not easily given to excitement or anger;
- c. understanding and tolerant of others;
- d. independent and responsible;
- e. agreeable rather than aggressive;
- f. safety conscious--not inclined to gamble or take chances;
- g. reality oriented--not given to fantasy; and
- h. able to accept blame and to recognize limitations.

Specific skill criteria should be added if a van or bus is to be driven or the driver should be trained before operating the vehicle.

Care should be taken in selecting escorts as well since escorts may need special skills or strengths to assist clients in boarding and getting off a vehicle. Examination of such requirements as passenger assistance training should help to determine what characteristics are needed. For further information, see Davis et al. mentioned above or Transportation for the Elderly and Handicapped: Programs and Problems, Washington, D.C.: Office of Technology Sharing, U.S. Department of Transportation.

Effective interviews allow effective placements, i.e., the matching of volunteer characteristics and skills with the requirements of the job. Effective interviews also can detect those volunteers with unique skills, capabilities or areas of expertise. Such volunteers should not be underutilized or assigned to jobs that do not fit. If their skills cannot be matched with current job descriptions, further possibilities should be explored. Many potential volunteer jobs are overlooked simply because it never occurs to the agency's staff that particular jobs can be filled with volunteer help. Such potential jobs should be explored with staff in order to ensure optimum utilization of volunteer skills. For example, an effective interview may uncover a graphics artist with experience in public information and education. Rather than placing this volunteer in an assignment which may not be satisfying

personally and which would underutilize the volunteer's skills, ways of utilizing this person's unique skills should be explored. Such a person may have media contacts (radio, television, newspaper contacts) which could prove invaluable in helping to establish the agency and its programs' visibility and credibility in the community. Such a person also could be used to develop new recruitment campaigns and to redesign brochures and other printed materials on the agency and its programs.

Orientation. The overall goal of orientation is to prepare volunteers for effective job performance. In order to perform their jobs effectively, volunteers should be acquainted with (1) the agency's organization and its goals, (2) the community the agency serves, (3) the importance of their duties to the total program and (4) the staff with which they will be working. An orientation session or program should be designed to meet these four needs.

Initially, orientation begins during the interview. During the interview, the general purpose of the agency should be discussed as well as the volunteer's job itself (duties, hours, supervisor, etc.) and the volunteer's responsibilities to the agency (dependability, punctuality, responsible behavior, etc.). Later, more detailed orientation can be accomplished on a person-to-person basis or in a group session.

During orientation, a volunteer should be acquainted with the agency's and the volunteer program's goals, policies and regulations. Special emphasis should be placed on those policies and regulations which are relevant to the volunteer's job. Attention should be given to how to answer client inquiries about the agency's program.

A volunteer should also be acquainted with the relationships of the agency to the community and to other community agencies. This should include

information about the social and physical (types of disabilities) characteristics of the clients the agency serves.

During orientation, the volunteer's specific job and job responsibilities should be reemphasized. The relationship of this job and the importance of this job to the total program should also be clarified.

Another essential part of orientation should be the introduction of the volunteer to the staff and other volunteers. Introductions to the staff within the department in which the volunteer will be working can be handled by the volunteer's supervisor. In addition, the volunteer should be familiarized with the agency's physical layout (i.e., the locations of the various departments, lounge, exits, entrances, restrooms, etc.).

Training. In addition to orientation, most volunteers will require specific training. The type and amount of training needed will be determined by the volunteer's job or assignment. Training may be divided into two general types--pre-service training and on-the-job training. Some jobs require only one of these types of training while others require a combination of the two.

Pre-service training focuses on the development of skills or knowledge needed for a particular job or assignment. For an escort, pre-service training may include training in the use of a vehicle's special equipment (e.g., training in how to operate a wheelchair lift) and how to handle passengers with special needs (e.g., the mentally retarded). For a telephone aide, pre-service training may include training on record keeping (i.e., how to keep records on filled and unfilled transportation requests).

On-the-job training is frequently one-to-one instruction. This type of training should be developed by the volunteer's immediate supervisor but may

be carried out by another staff member or volunteer. This type of training allows the volunteer to practice knowledge and skills developed in pre-service training and/or to improve existing skills.

Training is particularly important for the driver and escort. Ideally, training for drivers should include a review of basic driving skills and accident avoidance and/or defensive driving. Both escorts and drivers would profit by having basic first-aid and emergency skills. Passenger assistance techniques for working with persons with physical disabilities are essential if the agency's client population includes such persons. Basic human relations skills should be emphasized as well as how to handle nonmedical emergencies. Special programs have been developed for older drivers. The 55 Alive Mature Driving Course is available from the National Retired Teachers Association/American Association of Retired Persons in Washington, D.C. Some other training programs for various skills are being developed at this time. See Frank W. Davis, Jr., et al., Driver Selection and Training for Human Service Agencies, Washington, D.C.: U.S. Department of Health and Human Services (forthcoming, see p. 51).

Directing

Supervision. Like staff, volunteers require supervision to ensure that the duties and responsibilities of their job are being performed. Also like staff, the type and amount of supervision they need will depend upon the requirements of the job and the particular volunteer.

On-the-job supervision should be performed by the person directly responsible for the volunteer's task performance, for example, the head dispatcher, the scheduling supervisor or the head of the department in which the volunteer

is working. This daily supervision should be supplemented by periodic evaluation conferences with the individual volunteer and the director of volunteers or whoever is responsible for the administration of volunteers. Before this conference, the volunteer's supervisor should submit a written statement of satisfactions and dissatisfactions with the volunteer, stressing the volunteer's strengths and weaknesses. The director of volunteers should discuss this report with the volunteer and should solicit the volunteer's satisfactions and dissatisfactions with the job or assignment. An evaluation conference should be held after two or three months of service and periodically (every six months or a year) thereafter.

These periodic evaluation conferences will enable the director of volunteers to alleviate problems as they arise, to assess the quality of volunteer work, to render positive reinforcement for good performance, to determine the extent to which various staff members work effectively with volunteers, to weed out volunteers whose job performance is inadequate, to revise staff assignments and to strengthen the teamwork between staff and volunteers. The director of volunteers can use these conferences to obtain evaluations of his own performance from subordinates.

Motivation. An essential task of administering volunteers is maintaining volunteer motivation. Highly motivated volunteers are crucial to the success of any type of volunteer program.

It is a popular assumption that the primary motivation (need or desire) for doing volunteer work is altruistic in nature, i.e., a desire to help others. However, studies of volunteers have shown that there is a wide range of motivations for doing volunteer work. Of these motivations, self-directed

or self-serving motives are as important, if not more important, than other-directed or altruistic motives. Some of these self-serving motives for volunteering are to meet people, to gain status or recognition, to get out of the house, to gain job experience, to occupy spare time, to fulfill job obligations, to share social activities with friends, to acquire new knowledge and skills, to help make decisions about future careers, to gain an increased sense of self-worth, to be doing something worthwhile, to have new experiences, to meet new people, to feel useful and to reduce loneliness and isolation.

It should be remembered that each individual has a unique set or configuration of motives for volunteering. These needs or desires must be satisfied if the volunteer is to stay motivated in the job. Experience has shown that highly motivated volunteers are essential to the success of any type of volunteer program.

Behavioral science has shown that if positive behavior (volunteering) is not rewarded, it will tend to disappear. Thus, a major concern of anyone administering volunteers should be rewarding volunteer behavior.

How can an agency reward a volunteer? Rewards can be divided into two major types--intrinsic and extrinsic rewards. Intrinsic rewards are related to the nature of the work itself. Doing a needed job well may be satisfying in and of itself. An agency can help to ensure that volunteer work will be meaningful and personally satisfying by designing meaningful and needed jobs, by effective placement (matching volunteer skills to jobs) and by utilizing the full potential of the volunteers.

Extrinsic rewards are unrelated to the nature and performance of the work itself. Such rewards include informal volunteer recognition (expressions of approval by staff) and formal volunteer recognition (e.g., recognition dinners,

recognition certificates, the publishing of volunteer accomplishments in the agency's newsletters or local newspaper and letters of appreciation). These types of extrinsic rewards generally involve very little time, money or effort. However, these rewards acknowledge that the volunteers' work is not taken for granted and that the volunteers' efforts are needed and appreciated. A variety of extrinsic rewards should be used.

Those who have studied volunteer programs have noted that lack of staff acceptance and support can be and often is deadly to volunteer programs and efforts. Behind every successful volunteer there is a supporting staff member who has given time and energy. This teamwork between staff and volunteers is crucial to successful programs.

Successful teamwork should receive recognition. Just like the volunteers, the staff need to know that their efforts are important and appreciated. All too often, staff are ignored in recognition activities and ceremonies. In ignoring staff participation, half of the teamwork is ignored--the staff's skill, commitment to the program and the extra work and time involved in working with volunteers.

In formal recognition activities it is important to acknowledge both volunteers and staff as a team. Members of the team should be mentioned together. For example, their names should be linked with each other at recognition ceremonies, in publishing accomplishments (in newsletters and in human interest stories in the local paper), in recognition certificates and in other formal recognition activities. Such recognition does not detract from volunteer recognition and may greatly increase successful teamwork.

Other ways of motivating successful teamwork should also be explored. An agency's personnel merit system should officially recognize staff who work

effectively with volunteers. The supervisory skills of those staff who effectively supervise volunteers should be noted when considering promotions. Staff personnel files should include letters of commendation for productive work with volunteers. Copies of recognition awards (certificates, media publications, etc.) given to the volunteers they supervise or given to the staff/ volunteer team also should be made part of their personnel file. Productive work with volunteers should also be recognized when considering merit raises.

Record Keeping

Record keeping is an important aspect of directing the volunteer transportation program. Several sources for designing record keeping forms and systems appear in previous chapters. Record keeping is an important source of data for funding agencies, for insurance rates, for legal defense in accident cases and for maintenance of vehicles. Finally, accurate record keeping allows an agency to estimate the cost of its transportation program and to evaluate the cost against those that alternative providers might offer.

A file of information on each vehicle owned or leased by the agency is needed. The file should contain information on when the vehicle received routine maintenance, what repair work was done, mileage between service, oil and gas consumption, mileage and costs for all of the above items. This file will enable the transportation manager to evaluate vehicle performance and to plan routine maintenance. Drivers will need to record some of this information on a form or booklet kept in the vehicle.

A volunteer file should be kept on each person serving as a volunteer in the agency's program. The information gathered for the initial placement,

physical examination records (for drivers), reports on performance from supervising staff members and records of awards should be placed in this file. Volunteers should be given the opportunity to add materials to their files if they wish to do so. Results of the conferences of the supervisor with the volunteer should be kept here. Completion of special training programs and accident records should appear here. Absenteeism records will provide valuable information on the dependability of volunteers.

Passenger records are important in documenting the amount of service given, trip purposes supplied, characteristics of clients served and relationships that develop between particular clients and volunteers. It is helpful in calculating cost of a particular trip to know how many persons were transported how many miles and for what purposes each person was traveling. These records can be secured by keeping trip logs in all vehicles used for a sample period of time or continuously. Simple forms can be devised. See Wegmann and Chatterjee, Rural Transportation Record Keeping: Problems and Opportunities, Knoxville: Transportation Center, The University of Tennessee, 1980, for details. (This report is available from the Bureau of Mass Transit, Tennessee Department of Transportation.) The number of trips provided by volunteers as well as unreimbursed mileage contributed may be an important source of matching funds for certain grant programs. Time and money contributed are important to document.

Perhaps equally important to client satisfaction is the volunteer-client relationship. A volunteer working with a kidney dialysis patient who requires regular transportation to a center for treatment may be able to respond more effectively to idiosyncratic needs if the volunteer works with this client over a period of time. A human service program in Camden, New Jersey, reports

good success in matching volunteers (reimbursed for mileage) in this fashion. For these purposes, a card file detailing client characteristics and trip needs and matching volunteers may be helpful for dispatching.

All accident data, including copies of the accident report; evaluation of the accident causes by the driver, escorts and passengers; and review by the agency, should be placed in a file. Results of insurance settlements and legal proceedings, if any, should be kept in this file.

Evaluation

The necessity of periodic evaluations of volunteer performance was discussed briefly earlier. Periodic and systematic program evaluations are just as important to the success of a volunteer program. There are a number of reasons why systematic evaluations should be an essential feature of any program.

1. Evaluations are required by most funding sources.
2. Evaluations enable the agency to determine whether or not the goals and objectives of the program are being accomplished.
3. Evaluations highlight the weaknesses of the program and point out what needs to be done to overcome these weaknesses (increase volunteer training time, alter job design, alter plans, etc.).
4. Evaluations determine which activities are effective, which are ineffective and which may be detrimental to the program's goals and client needs.
5. Evaluations enable the discovery and alleviation of problems as they arise.
6. Evaluations assess the performance of volunteers and staff and thus enable positive reinforcement for good performances.
7. Evaluations provide feedback on the cost effectiveness of the program.

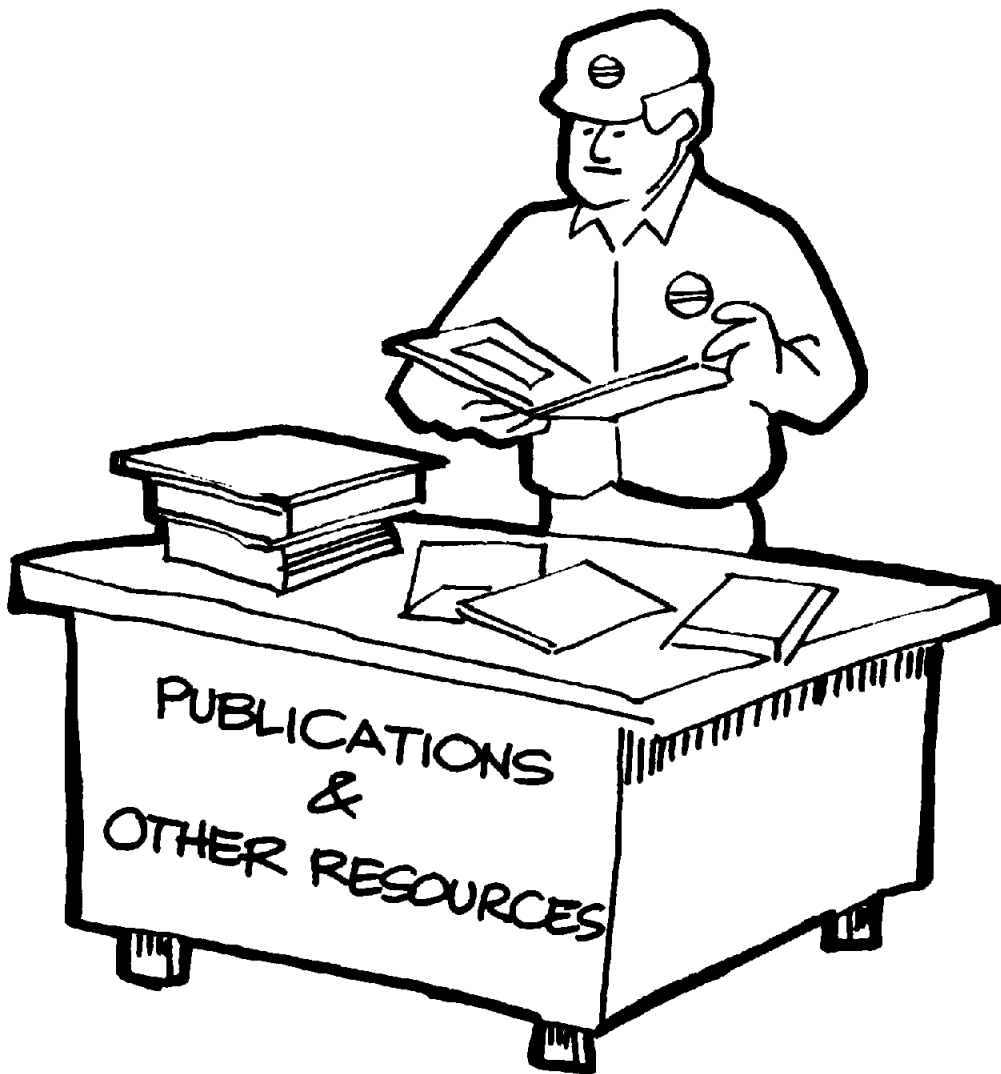
Any evaluation of the quality and value of the volunteer program should include all groups affected by the program. Each of these groups (volunteers,

staff, administration, director of volunteers and clients) should evaluate the program from its perspective. During the process of evaluation, a number of questions should be asked.

1. Is the program effectively meeting its goals and objectives?
2. Is the cost of the volunteer program justifiable in terms of its output?
3. Does the volunteer program have staff support?
4. What volunteer jobs could be performed better by staff?
5. Are the clients satisfied with the program?
6. Are staff/volunteer responsibilities clearly defined?
7. Does cooperative team work exist between volunteers and staff?
8. What are the frustrations faced by volunteers in their work?
9. Are volunteer jobs well designed and meaningful?
10. In what additional ways can volunteers be used?
11. What is the turnover rate of volunteers?
12. Is the turnover rate higher in some jobs than in others? (If so, Why? What can be done about it?)

Some agencies may want to design their own systems of evaluation while others may prefer to use or modify existing evaluation systems and forms. Many evaluation systems and forms currently are available in the literature on volunteers and from resource organizations. One of the most thorough evaluation systems, Bobette Reigel's Basic Feedback System: A Self-Assessment Process for Volunteer Programs, is available through VOLUNTEER: The National Center For Citizen Involvement. This easy-to-use manual provides forms for assessing the volunteer program from different perspectives (staff, administration, volunteer) and national norms which allow agencies to compare their assessment scores.

RESOURCES



IV. RESOURCES

Until the last decade managers of volunteer programs have had very few resources to draw upon in order to execute their jobs effectively. However, the last decade has seen the growth of many valuable resources. This chapter lists and discusses some of these resources. Volunteer Readership, one of the listings under Publications, is an easily accessible guide to these and many other resources.

Publications

Below is an alphabetical listing of publications which volunteer transportation program managers may find useful.

Collette, Clara L., Volunteers: How to Find, Train and Utilize Volunteers, Corvallis, Oregon: Oregon State University, Continuing Education Publications, 1973.

This short manual is directed toward volunteer programs serving senior citizens but is useful to other types of programs. Topics include volunteer roles, recruitment, interviewing, selection, placement, training, motivation and evaluation.

Davis, Frank W. Jr. et al., Driver Selection and Training for Human Service Agencies, Washington, D.C.: U.S. Department of Health and Human Services, forthcoming.

This document makes a number of important suggestions for designing selection and training procedures for human service agency transportation program drivers. The title is tentative. For further information, contact Frank W. Davis, Jr., Department of Marketing and Transportation, The University of Tennessee, Knoxville, Tennessee 37996-0530.

How To Do It "Kit": Aids for Volunteer Administrators, National Center for Voluntary Action, Washington, D.C., 1976

This kit, designed for volunteer programs, contains 14 publications (brochures, reference listings, booklets, etc.). These publications include: "Telling Your Story: Ideas for Local Publicity," "Local Fund Development," "Responsibilities and Rights in Volunteer Relationships" and "Recruiting Volunteers."

Johnson, Douglas, The Care and Feeding of Volunteers, Nashville: Abingdon, 1978.

This book is specifically oriented toward use of volunteers in the church. The book contains some excellent advice on recruiting, motivating and helping volunteers to do quality work. The book shows great insight into problems of identifying and recruiting volunteers, giving assignments, planning with volunteers and training. The book is available for \$4.95 + \$1.20 postage and handling from Abingdon, 201 Eighth Avenue S., Nashville, TN 37202.

Moore, Larry F. and Anderson, John C. (eds.), Volunteer Administration: Readings for the Practitioner, Vancouver, BC: The Voluntary Action Resource Center and the Volunteer Bureau of Greater Vancouver, 1977.

This useful resource is a collection of readings designed for volunteer program administrators. The collection includes readings on planning, recruiting, training, motivating, interviewing, selecting and reward systems for volunteer programs. Social service agencies using volunteers will find these readings are particularly helpful.

Naylor, Harriet H., Volunteers Today: Finding, Training and Working with Them, Dryden Associates, 1967-73.

Considered a "classic" in the field, this book offers sound principles and practices for volunteer administrators. Issues covered include personnel administration, recruitment, placement, supervision, training, volunteer-staff relations and volunteer motivation.

Reigel, Bobette W., Basic Feedback System: A Self-Assessment Process for Volunteer Programs, Boulder, Colorado: National Information Center on Volunteerism, 1977.

This is an easy-to-use manual which presents a step-by-step system for volunteer program assessment. Self-assessment forms included in this manual are: Volunteer Coordinator Scorecard, Top Management Checklist, Staff Reactions to Volunteer Programs, Volunteer Feedback, One-to-One Client, Checklist for Board Members and Voluntary Action Center Checklist. This practical manual allows volunteer program administrators to compare their programs' performance to national norms on such characteristics as volunteer motivation, staff support, top management commitment, recruitment and screening, and orientation and training.

Scheier, Ivan H., Winning With Staff: A New Look At Staff Support for Volunteers, Boulder, Colorado: National Information Center on Volunteerism, 1978.

This practical manual examines a fundamental problem of volunteer programs--lack of agency and staff support. It presents seven strategies or principles to develop and maintain agency and staff support. Strategies include the diagnosis or assessment of the problem, the development of a reward system for staff, and staff participation in the volunteer program. Included in this manual are forms to diagnose volunteer-staff relations, to assess staff reactions to volunteer programs and to assess top management commitment to the volunteer program.

Stengel, Anne K. and Feeney, Helen M., Volunteer Training and Development: A Manual (revised edition), New York: Seabury Press, 1976.

This comprehensive manual is directed to a variety of groups--agencies planning to create volunteer programs, directors of volunteers, staff supervising volunteers, etc. Sample forms, guides, charts and checklists are included which may be revised or adapted for use by volunteer administrators.

Voluntary Action Leadership, VOLUNTEER: The National Center for Citizen Involvement, 1111 N. 19th Street, Room 500, Arlington, Virginia 22209 and P.O. Box 4179, Boulder, Colorado 80306.

Voluntary Action Leadership is a quarterly publication of VOLUNTEER: The National Center for Citizen Involvement. This journal contains articles on all phases of volunteer program management, volunteer program profiles, a calendar of conferences and workshops on volunteers, reviews and other items of interest to volunteer program administrators. A one-year subscription is \$8.00.

Volunteer Readership, VOLUNTEER: The National Center for Citizen Involvement, P.O. Box 4179, Boulder, Colorado 80306 and 1111 N. 19th Street, Room 500, Arlington, Virginia 22209.

Volunteer Readership is a free catalog which contains an annotated bibliography on both new and old books, manuals and journals in the field of volunteerism. Listed literature may be ordered directly from Volunteer Readership.

Wegmann, Frederick J. and Chatterjee, Arun, Rural Transportation Record Keeping: Problems and Opportunities, Knoxville: Transportation Center, The University of Tennessee, 1980 (available from the Bureau of Mass Transit, Tennessee Department of Transportation, Nashville, Tennessee 37219).

This publication provides valuable suggestions on transportation record keeping.

Wilson, Marlene, The Effective Management of Volunteer Programs, Boulder, Colorado: Volunteer Management Associates, 1976.

This book is a "must" for anyone managing volunteer programs. This practical guide to volunteer management applies basic management theories to practice. Topics include the role of a manager, job design, volunteer supervision, planning, motivation, recruitment, training, interviewing, placement and communication. It also contains samples of volunteer applications, job

descriptions, evaluation forms and questionnaires which social service agencies may find useful for their own volunteer programs.

Associations and Organizations

Association for Volunteer Administration, P.O. Box 4584, Boulder, Colorado 80306, 303-497-0238

Association for Volunteer Administration is a professional association for administrators of volunteer programs and other persons interested in the field of volunteerism. Membership dues include subscriptions to Voluntary Action Leadership (published quarterly), Volunteer Administration (monthly newsletter), and Professional Ethics in Volunteer Services Administration.

VOLUNTEER: The National Center for Citizen Involvement, P.O. Box 4179, Boulder, Colorado, 80306, 303-447-0492, and 1111 N. 19th Street, Room 500, Arlington, Virginia 22209, 703-276-0542.

The National Information Center on Volunteerism and the National Center for Voluntary Action recently merged to form VOLUNTEER. VOLUNTEER is a national resource organization for leaders of volunteer efforts. VOLUNTEER provides a wide range of services for volunteer programs. Services include technical assistance, leadership training and education, information, consultation and program evaluation. For further information on its services, contact the above address.

Courses and Workshops

The University of Tennessee at Chattanooga and Knoxville have both offered courses/workshops (usually through their Continuing Education Divisions) on administering volunteers. These courses/workshops typically deal with all practical aspects of administering volunteer programs, from planning to evaluating. Contact the university or college nearest your agency for information about similar courses.

For several years, VOLUNTEER has offered conferences and workshops in various parts of the country. The conferences are designed to offer comprehensive leadership training for those involved in volunteer programs. Workshops and conferences typically include topics such as volunteer-staff relations, skills for managing volunteers, local fund development, gaining community acceptance and evaluation and planning for volunteer programs. VOLUNTEER also offers advanced level seminars throughout the year in the Rockies near Boulder. Write VOLUNTEER, P.O. Box 4179, Boulder, Colorado, 80306, for a calendar of their workshops and training events.

APPENDIX A WHEELS, MEDICAL AND SPECIALIZED TRANSPORTATION, INC.



APPENDIX A

WHEELS, MEDICAL AND SPECIALIZED TRANSPORTATION, INC.

In 1959 the Health and Welfare Council of Philadelphia, Pennsylvania, asked the Junior League Chapter to start a volunteer transportation service to provide medical and specialized transportation. The Junior League organized the service, operated it for three years and then turned it over to the Board of Directors. The nonprofit corporation was incorporated in the state of Delaware as Wheels for Welfare, Inc. on January 11, 1962. The name was officially shortened to Wheels, Incorporated in November 1976. Now the corporation is known as Wheels, Medical and Specialized Transportation, Inc.

The official purposes of the corporation are "exclusively scientific, educational and charitable" and are limited to

. . . administrating [and operating] a transportation service for the medical, rehabilitative, therapeutic, educational and other transportation needs of ill, injured, handicapped, elderly or disabled persons and to promote the development of coordinated, economic and efficient transportation for such persons.

In 1978 the agency provided transportation to 4,792 individuals. The expenditure for the year was \$659,850. Wheels provided contract service to the Philadelphia Corp. for Aging and the North Central Philadelphia Mental Health and Mental Rehabilitation Center. Eighty-two volunteers helped to provide the service through various efforts. Fifty-two of these volunteers drove. The service has seven staff employees (headed by an executive director), ten salaried drivers, ten full-time hourly drivers, ten part-time drivers and five escorts. The service scheduled 109,738 trips and was unable to fill another 13,613 recorded requests for service.

How does Wheels rate according to criteria for the successful volunteer program?

Cost

Cost of the volunteer portion of the service is not easy to determine since the same personnel are used to schedule and administer both the paid driver and volunteer driver trips. For January of 1979:

$$\frac{\text{the total administrative cost}}{\text{the total \# of client trips driven}} = \$2.03$$

Personnel at the agency estimated driver-owned vehicle costs per mile at \$1.00. These figures seem high, but cost figures in this area are difficult to obtain since many agencies do not provide a full accounting of expenses.

Ready Availability of Service

The service may be scheduled on a regular basis through social service departments of clinics or hospitals or by calling Wheels. All requests must be made two days in advance. The service is available from 7:00 a.m. to 5:00 p.m. on weekdays.

Level of Service

The service is provided door-to-door with a comfortable automobile by an experienced volunteer who has received training. Escorts are provided when needed. Routing is arranged to be direct. Average trip length is just under three miles. Passengers report that volunteer-client relations are friendly.

Coordination and Communication

Although Wheels seems to be operating at the limits of its resources, other contracts with agencies providing vehicles and operating money might be a possibility. Currently coordination exists with two agencies that provide six vans for Wheels' use and contributed over \$285,000 (over one-third) of the 1978 budget. Hospitals appear to coordinate their needs with Wheels.

Financial Support

Financial support for the program seems quite stable in that the support comes from agencies in the local area that purchase service and from a broad base of contributors. Local fund-raising efforts from foundations, individual contributors, churches, benefits and an award dinner brought \$161,000 to the budget. The rest of the budget came through hospital fund-raising efforts. In short, the financial support mechanisms are a regular part of agency operation and are generated from local sources.

Recruitment, Training and Maintenance of Volunteer Corps

This aspect of the program appears to be a routine part of the operation, although eight years ago the agency started hiring drivers because not enough volunteers were available to meet the demand. Training is largely informal (one hour), but a driver handbook is available. Schedulers map out routes for the drivers, and drivers work at their convenience. (With paid drivers available, service can be offered at times of day when volunteers would be unwilling to drive.) A sample of volunteers reveals that one-third have driven for the program for 10 or more years; another one-third have driven for the program for four or more years. None had driven for the program for less than two years. Person-to-person recruiting is the most effective method, although approximately \$8,000 is spent annually on recruiting materials and salaries. The relatively long length of service of volunteers suggests that the base is stable, but it may also suggest that not many new drivers stick with the program.

Utilization

Utilization of the service appears excellent. With over 10 percent of the requests for service remaining unfilled, it would appear that Wheels is operating at capacity given its current efficiency of operation.

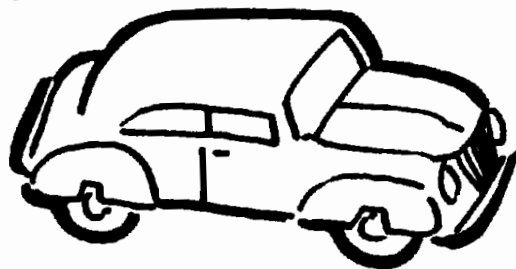
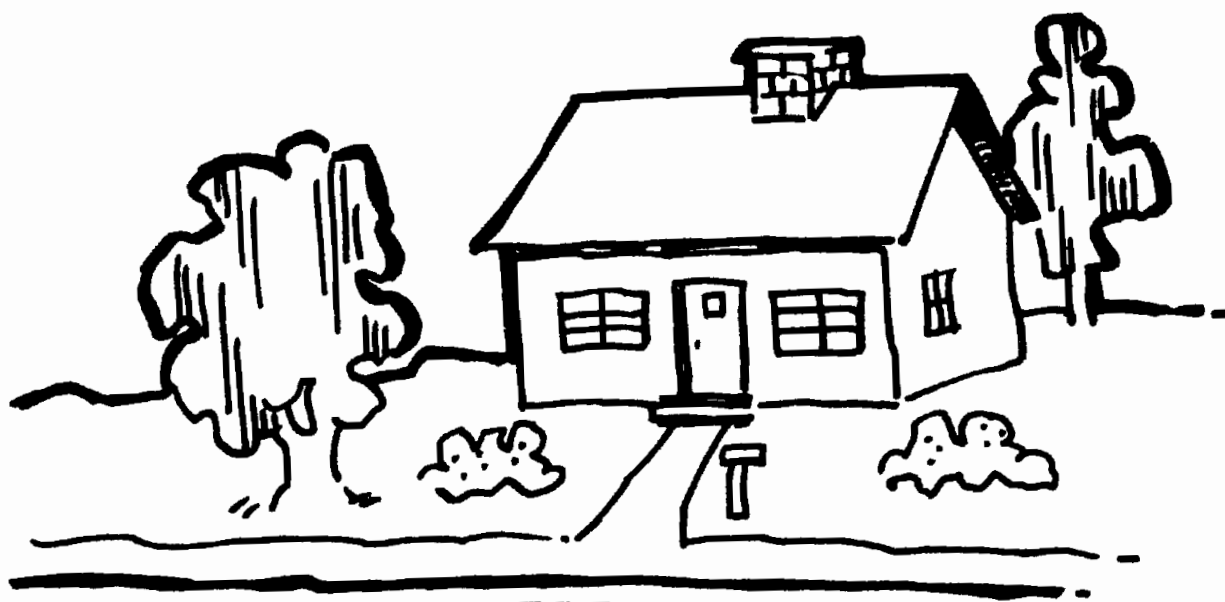
Length of Existence

Twenty years of operation for the service suggests that a number of basic problems of continuing to provide transportation have been solved.

Conclusion

Wheels, Medical and Specialized Transportation Service, Inc., appears to be a strong program meeting an important need in the Philadelphia area. While paid drivers and escorts offer most of the services, the volunteer component remains strong and important. The staff estimates that volunteer drivers average three hours per week. This means that volunteers contribute approximately 156 person hours per week. Since few (9 percent) of the volunteers are reimbursed for mileage, most volunteers are giving the value of their operating expenses as well as their driving time. The volunteer time contribution is the equivalent of four full-time drivers each week. While this represents only a fifth of the time for full-time paid drivers in the program, the volunteer time plus the mileage is nevertheless a substantial contribution to the medical and specialized transportation needs and costs in the Philadelphia area.

APPENDIX B VOLUNTEER-DRIVER GUIDE



APPENDIX B

VOLUNTEER-DRIVER GUIDE

The following manual was published by the Volunteer Service of Santa Cruz County, Inc. It can serve as a model for agencies using volunteer drivers. The tone of the manual is warm and businesslike. The manual is limited to only the most essential information. (Training programs should cover information not needed as frequently.) The manual is indexed in flip chart fashion for easy reference in the car or elsewhere.



VOLUNTEER-DRIVER GUIDE

(GLOVE-COMPARTMENT COMPANION)

VOLUNTEER SERVICE OF SANTA CRUZ COUNTY

SANTA CRUZ
1110 Emeline Ave.
Phone: 423-0554

WATSONVILLE
406 Main Street
Phone: 722-5744



VSSCC

MEMO FROM:

Your "GLOVE COMPARTMENT COMPANION"

Dear Volunteer Driver,

I am using my pages to present important ideas that will help you while you are driving as a volunteer.

You in TRANSPORTATION SERVICE will drive clients who have called the VSSCC office because they are unable to make, or cannot afford other arrangements for transportation.

You volunteers in any other SERVICE may be asked to drive your client - which makes you also a Volunteer-Driver.

THE REQUIRED "TOOLS OF THIS TRADE" ARE:

- . a family-owned car
- . an up-to-date Driver's License
- . the protection of Volunteer-Driver ~~Excess~~ Liability Insurance, available and provided by the VSSCC.
- . a general knowledge of all of the volunteer services and a clear understanding of your own responsibilities

- . a genuine desire to lend a helping hand by contributing both time and automobile expense.

RECOGNIZING THAT VOLUNTEER DRIVERS need to feel that the time they are giving is being used wisely and well, they are urged to ask questions and to offer suggestions.

"HAPPY DRIVING"

Desk Volunteers receive requests and make assignments for transportation, by phone in the central offices.

They clear requests according to VSSCC policy.

They contact Volunteer-Drivers until they find one who can accept the assignment.

Records of all trips are kept on file.

Volunteer-Drivers should accept requests for transportation only through the office.

If interested in one particular client, arrangements can be made to drive any client regularly by calling the office.

Volunteer-Drivers should notify the office of any change in when they will be available for transportation assignments.

Santa Cruz Office	Watsonville Office
10 to 4	10 to noon
Phone: 427-3435	Phone: 722-5744
(emergency calls)	
8:30 to 5:00	Phone: 688-2033
Phone: 423-0554	ext: 2480

TRANSPORTATION ASSIGNMENTS

DO'S FOR DRIVERS

VSSCC LIABILITY INSURANCE

WHAT TO DO IF THE CLIENT

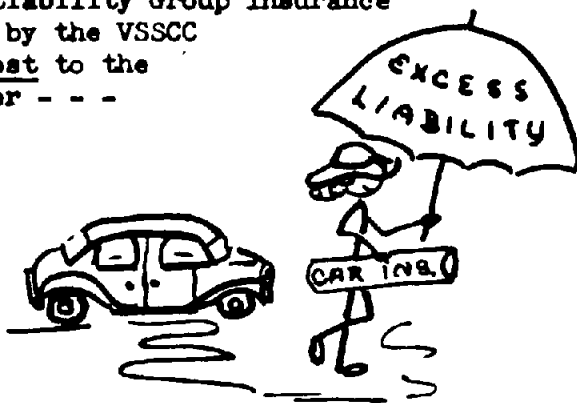
WHAT TO DO IF THE CLIENT

IN CASE OF AN ACCIDENT

- . DO keep this booklet in the glove compartment of your car for ready reference.
- . DO keep a record of your volunteer driving mileage. This record may be used for deduction on your income tax.
- . DO phone the client to verify the address and confirm the appointment the day of the ride.
eg. Capitola Road or Capitola Avenue.
- . DO carry the client's name, address, phone number and destination with you for reference.
- . DO not hesitate to telephone the Volunteer office or your service coordinator if any problem should arise.
- . DO feel free to offer suggestions you may have for improving this Transportation Service.
- . DO feel welcome to drop in and have a cup of coffee at the VSSCC offices.
- . DO apply, through the Transportation Coordinator or the director, for Milage Reimbursement if you need payment for gasoline.

DO'S FOR DRIVERS
VSSCC LIABILITY INSURANCE
WHAT TO DO IF THE CLIENT
WHAT TO DO IF THE CLIENT
IN CASE OF AN ACCIDENT

FOR VOLUNTEERS TO BE COVERED by the
Excess-Liability Group Insurance
carried by the VSSCC
at no cost to the
Volunteer - - -



ALL VOLUNTEERS WHO DRIVE CLIENTS MUST:

- . carry a valid Driver's License
- . have personal automobile insurance
- . have completed the VSSCC "Volunteer-Driver Registration Form"
- . drive their own or family-owned car
- . accept no payment for service (if a client offers suggest client send \$2.00 for membership or donation to the office).

"Volunteer-Driver Excess Liability" coverage gives the client and the volunteer extra protection above the driver's "owned-auto" insurance.

VSSCC LIABILITY INSURANCE

WHAT TO DO IF THE CLIENT

WHAT TO DO IF THE CLIENT

IN CASE OF AN ACCIDENT

WHAT DOES THE DRIVER DO IF THE CLIENT:

- . asks to go additional places other than requested initially?
- . wishes to take friends along?
If you are unable to take an additional person, say so and suggest that the extra party phone the office for transportation. (report additional clients to the office)
- . asks for or seems to be in need of additional help?
Call your concern in to the office. Perhaps the client can use help from one of our other services or from another local agency.
- . needs physical support while walking or getting into and out of the car?
Allow him to take your arm - the client is able to gauge how much support is necessary.
- . asks for your home phone number?
Explain that all requests should be phoned in to the office, not to the driver. To assure transportation for all who need it and to cover drivers with insurance, the office must keep records of all transportation assignments.

WHAT TO DO IF THE CLIENT

WHAT TO DO IF THE CLIENT

IN CASE OF AN ACCIDENT

WHAT DOES THE DRIVER DO IF THE CLIENT:

seems questionable regarding eligibility for our services?

After the assignment is completed, phone your concern in to the office.

offers to pay something towards gasoline or other expenses?

Explain that:

Volunteers may not accept money from clients.

Clients desiring to do so, may make a contribution to the VSSCC through the office as membership fee or donation.

(In driving clients, if you believe or if you learn that they could make other arrangements - give this information to the Desk Volunteer who will forward it to Transportation Coordinator - this is appreciated.)

- .. "Patience and understanding can erase many problems and make the trip a pleasant one for the Volunteer-Driver as well as for the Client."

WHAT TO DO IF THE CLIENT

IN CASE OF AN ACCIDENT

DRIVE CAREFULLY - - -

but



IN THE EVENT OF AN ACCIDENT:

- . Stop and aid those who are hurt.
- . Call or send someone for help if anyone is injured or if damage is possibly \$200 or more.
Highway Patrol (emergency) ZEL-2000
Local Police - call Operator (0)
- . Prevent further injury or damage to persons and vehicles.
- . Do not move injured persons unless necessary to prevent further injury.
- . Keep injured persons warm and quiet.
- . Use the enclosed forms to obtain name, address etc. of all witnesses.
- . Make no statements about who was at fault, etc.
- . Notify VSSCC office.
- . Notify your insurance company of accident and of VSSCC Excess Liability coverage.
(Insurance companies require a police report of the accident)

IN CASE OF AN ACCIDENT

ACCIDENT INFORMATION FORM

Date of Accident	Time of Accident	
LOCATION OF ACCIDENT		
..... Street City, Town State
OTHER VEHICLE		
Make	Model	
Year	License	State
Name of Driver		
Name of Owner		
Insured by	Policy No.	
Damage to other vehicle		
.....		
Damage to property		
.....		
PERSONS INJURED		
1) Name	Telephone No.	
Address	City	State
2) Name	Telephone No.	
Address	City	State
OCCUPANTS YOUR CAR		
1) Name	Telephone No.	
Address	City	State
2) Name	Telephone No.	
Address	City	State
OCCUPANTS OTHER CAR		
1) Name	Telephone No.	
Address	City	State
2) Name	Telephone No.	
Address	City	State
WITNESSES		
1) Name	Telephone No.	
Address	City	State
2) Name	Telephone No.	
Address	City	State

INFORMATION FOR CLIENTS

Please observe the following:

1. Call between 10:00 am. and 4:00 pm. 427-3425 and ask for the Transportation Desk. A volunteer desk worker will talk with you.
2. We need 48 hours or more notice to fill your request.
3. Please plan to consolidate your appointments, all in one trip as we can only fill one request per week.
4. We are not equipped for wheel chairs.
5. Appointments should be made for after 9:00 am. or before 3:30 pm. (occasional exceptions for emergencies)
6. Priority goes to Welfare, OAS and MediCal clients.
7. Please notify Volunteer Service if the appointment is cancelled or if someone else will take you.
8. No beauty parlor appointments.

CLIENT'S PHONESIDE TRANSPORTATION AID

