



SUCCESS

With VOLUNTEER
TRANSPORTATION

By
Dennis Studebaker

SUCCEEDING WITH
VOLUNTEER
TRANSPORTATION

By
DENNIS STUDEBAKER

ISBN #0-911029-21-4
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The "Volunteer Management Series" offers various subjects of interest and use to non-profit organizations and agencies that utilize the efforts of volunteers. It is designed and published through VMSystems - Heritage Arts Publishing, 1807 Prairie Avenue, Downers Grove, IL 60515 (708) 964-1194.

About the Author

Dennis Studebaker served as the Director of Volunteer Wheels for nearly seven years. During this time Volunteer Wheels grew into a complex, countywide volunteer transportation program with a national reputation for innovative excellence. In 1988 Dennis received Sonoma County Foundation's Community Leadership Award.

While on the Board of Directors of California's statewide specialized transit association, Dennis helped found California's first self-insurance pool for non-profit transportation providers. He also served as its first President.

Now training and consulting nationally, Dennis blends enthusiasm, vision, and inspiration with expertise and practical know-how.

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Acknowledgement

I had heard that writing a book is a strenuous exercise. Now I know first hand.

Here is my effort to thank you who in some significant way made this possible. I thank you deeply. All worthwhile achievements, it seems, are communal efforts to one degree or other.

Thanks to Jean Schulz, Karen Johnson and the Board of Directors of the Volunteer Center of Sonoma County for making this possible, especially Bill Barnier, David Bruce, and Nancy Holt, who helped with review and revision. Thanks also to those who helped with editing, proofreading and revision, especially Sue Limoli, Barbara Crossland, Jane Clayton, John Nidecker and Don Emblem. Thanks to my staff—Ellen Gerson, Laurie Alderman, Hazel Groom, Janet Winston, Bob Beal, Bob Greathouse, Lou Castillo, Ollie Furman, and to my wife Valerie and my kids Justin and Mollie for their support. A special thanks to Taia Stewart, Julie Fletcher-Tighe, Henry Eaton, Mikki Kraushaar, Pat Loose, Bob Williams, Mary Mulroy, David Cyra, Karen Trzeciak, Jean Engelke, and Ira Doom for willingly sharing their knowledge and expertise about volunteer transportation. Thanks to the thousands upon thousands of volunteers who have done so much for so many.

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Author's Notes

Volunteer Wheels has been serving Sonoma County, California since 1975. I was its director for many of these years. Much of the information presented in this book is therefore based on the Volunteer Wheels experience. It is written from a manager's perspective, with insight that could only come from first-hand experience.

Because Volunteer Wheels is representative of many other successful volunteer transportation programs in America, at first I thought I could adequately describe volunteer transportation using Volunteer Wheels as a model. After a while I realized the subject of volunteer transportation is too large, too complex to be fairly represented by the experiences of one program. So to broaden my perspective I took a journey to the heartland of America to research 7 other successful programs. Most of them have been operating for over ten years and one since World War II. There are many other prominent and successful volunteer transportation programs, both in America and in other countries, as well. I would like to have included many others in this research had time and resources allowed.

I also wish I could have included an exhaustive list of volunteer transportation programs. Unfortunately, no such list exists. In fact, no one even knows how many volunteer transportation programs there are. There is no national organization or association to which all belong. Even the national office of the American Red Cross can only estimate how many of their chapters use volunteer drivers (probably 1/2 to 1/3 of those that provide specialized transit). However, it is fairly well accepted that volunteer transportation programs exist in every state of our nation. My guess is that they number in the thousands.

People are often surprised to learn that there has been remarkably little cross-pollination or information sharing between programs nationally. Indeed, most volunteer transportation programs don't even know of each other's existence. With the exception of one program (the Area IV program in Indiana), each of the systems I visited developed entirely by themselves, largely through trial and error. Because each one "grassrooted" itself into existence, each brings something unique and original to the field. Together with Volunteer Wheels, these programs represent over 150 years of polymorphic, hands-on, home-grown expertise.

As I did this research I soon realized there are two distinct categories of volunteer transportation administration. For clarity, I decided to call one form of administration "agency-based," and the other "community-based."

The difference between agency-based and community-based programs will be described in detail in Chapter One. Briefly, it has to do with whether the program is administered by an agency or by the community itself.

Of the eight successful transportation programs included in this book, six are agency-based and two are community-based. Here is a list of those programs and the administrators I interviewed:

AGENCY-BASED

- Volunteer Wheels, Sonoma County, California. Dennis Studebaker, former Director.
- American Red Cross, Santa Cruz, California. Julie Fletcher-Tighe, Transportation Coordinator.

- American Cancer Society, Sonoma County Unit, California. Taia Stewart, Director of Patient Services.
- American Red Cross, Mile High Chapter, Denver, Colorado. Pat Loose, Community Programs and Youth Specialist; Bob Williams, Transportation Coordinator.
- Silver Key Senior Services, Colorado Springs, Colorado. Mikki Kraushaar, Executive Director.
- Volunteer Center, DeKalb, Illinois. Karen Trzeciak, Executive Director.

Community-Based

- Sonoma Care-A-Van, Sonoma, California. Henry Eaton, Former Program Coordinator.
- Area IV Agency on Aging and Community Services, Lafayette, Indiana. Jean Engelke, Deputy Director for Community Service and the Community Action Program.

A summary of each program is included with the Appendices.

The first-hand experiences of the program administrators will be quoted liberally throughout this book. Hearing them talk directly about what they've learned over the years is the best way to get the feel and flavor for the many ways to succeed with volunteer transportation.

For those unfamiliar with transportation terminology there is a brief Glossary with the Appendices to define terms like specialized transit, demand-response, and fixed route.

The Appendix also includes a copy of the Volunteer Wheels Handbook for Volunteers, and many sample forms and documents. Please be advised that these samples are offered only as suggestions and guidelines. If you copy them verbatim we cannot warrant their applicability in your particular circumstances, nor legality in your state. They will be most helpful used as starting points from which to create your own forms, handbooks, and documents.

Introduction

What is Volunteer Transportation?

The word voluntary finds its root in the French word *velle*, which means to will. A volunteer is one acting on his/her own free will...doing something because they want to. Transport means to carry from one place to another.

Putting those two concepts together in volunteer transportation, we have people carrying, of their own free will, other people from one place to another. In this exchange something remarkable, sometimes magical, happens. The giver usually benefits more than the receiver.

What makes volunteer transportation particularly intriguing to those interested in providing transportation services, aside from the obvious cost benefit, is that the most likely volunteer driver is a retiree and the number of retirees in our nation is dramatically rising. Karen Trzeciak, Associate Director of the DeKalb Volunteer Center in Illinois, sees this as a win-win opportunity.

You have people who are home-bound, who no longer have access to transportation options that we all take for granted, who no longer go to medical appointments or the hairdresser when they need to. And you have people who are healthy and still drive who wake up, have a cup of coffee and then stare into space and wonder what they'll do for the rest of the day. It only makes sense to match these people through volunteer transportation and thereby improve the quality of both lives.

The state of North Carolina recently prepared a document called "Aging Policy Plan for North Carolina." In the introduction they clearly

described what is happening with our elderly population.

At the turn of the century, the average life span in America was 47; today it is 71 for men and 78 for women. These are average life spans; many live even longer. In fact, people 85 and older are the fastest growing segment of the older population today.

They go on to say...

More than any other single fact, it is important to recognize that older people continue to be valuable, contributing members of our society. They have worked to make this nation and our state strong and progressive. Collectively they have a vast store of knowledge, skills, and abilities acquired over a lifetime that should continue to be used for the betterment of our society.

In volunteer transportation, seniors CAN continue to make a difference. They can help solve the growing transportation problems of their own age group. By staying active and involved they contribute to the growing body of evidence which suggests that senior years can be both creative and productive.

Of course, volunteer transportation is not limited to retirees. Adults of all ages and walks of life may enjoy this volunteer activity.

Volunteer transportation is highly adaptable, as well. It can serve a specific client population, such as cancer patients, or be the specialized transit for an entire county. It can be operated by an agency or by the community itself.

People seeking solutions to the ever-growing demand for specialized public transportation are interested in knowing if volunteerism offers an answer, a way out of the thicket of rising costs and reduced service. Anne Gurnack in "Volunteerism and Specialized Transportation: A Decision-Making Model" says,

During these times of decreased emphases on federal funding of human service programs, the feasibility of volunteer networks in connection with specialized transportation for elderly and disabled citizens needs to be considered. Specialized transport administrators are cautioned not to view volunteerism as a panacea, but as a desirable supplementary component to existing specialized transportation programs.

Volunteer transportation is particularly well suited to rural towns where public transit is financially prohibitive. In such communities volunteer transportation can have a striking impact.

There is ample evidence to support this claim--so much so that federal and state departments of transportation ought to give this innovative approach serious consideration.

Starting a volunteer transportation program requires vision and courage. This book is designed to help programs succeed. It replaces the myths about volunteer transportation with the facts. It contains a wealth of information about recruitment, volunteer management, insurance, and risk management.

Fay Ebrite, the Executive Director of the Area IV Agency on Aging in Indiana, has a quote by Jane Adams prominently displayed in her office. It reads:

What, after all, has maintained the human race on this old globe despite all the calamities of nature and all the failings of mankind...if not faith in new possibilities and the courage to advocate them.

Chapter One

Should You Start A Volunteer Transportation Program?

Before designing and implementing a volunteer transportation program, it is important to answer five essential questions:

1. Do the advantages of using volunteers outweigh the disadvantages?
2. Is the proposed service in competition with other specialized transit services?
3. Is there a strong sponsoring agency?
4. Are operating and capital funds readily available?
5. What is the probability of success with volunteer recruitment?

The answers to these questions will not only guide your decision about whether or not to use volunteers, they will tell you a great deal about your environment and the challenges you may face as you attempt to raise up a successful transportation program.

It is important to begin by understanding the differences between the two distinct categories of volunteer transportation administration:

1. Agency-based, and
2. Community-based.

Agency-based services are operated by an existing non-profit agency (e.g. American Red Cross, Volunteer Center, American Cancer Society) who may or may not contract with a government body to provide these services. Typically the manager or coordinator of the program is a professional.

Community-based services are administered by the community itself, usually by a volunteer Board of Directors fashioned for this purpose

alone. Community-based programs often receive technical and financial assistance from their State or County Department of Transportation or an Area Agency on Aging.

Even though agency-based and community-based programs may provide identical service to identical populations, they will differ in how they are administered. As you explore the following five questions, consider also which category of administration is appropriate to your needs.

QUESTION 1:

Do the Advantages of Using Volunteers Outweigh the Disadvantages?

While there is much that is good about volunteer transportation, a fact of life as constant as gravity is that any apparent advantage has a latent disadvantage hitched to it. Everyone will weigh these advantages and disadvantages differently depending on their circumstances and their perspective.

There are seven primary advantages and disadvantages to volunteer transportation. The first five apply to both community-based and agency-based programs. The last two apply only to community-based services.

The five common to both agency-based and community-based services are as follows:

<i>Advantages</i>	<i>Disadvantages</i>
1. It saves money.	1. Success depends on voluntary citizen commitment.
2. It's compassionate.	2. It can be unpredictable.
3. It builds a better community.	3. Labor or competing private companies might object.

<i>Advantages</i>	<i>Disadvantages</i>
4. It's extremely flexible.	4. It won't work everywhere.
5. It can be enjoyable.	5. It can be stressful.

The two advantages and disadvantages that apply specifically to community-based services are:

<i>Advantages</i>	<i>Disadvantages</i>
6. An entire population can readily be served.	6. Individual demand-response is difficult for community-based services to provide.
7. High visibility makes for ease with volunteer recruitment.	7. Attracting Board members with the necessary skills may be difficult.

Here's a detailed look at these seven advantages and disadvantages.

ADVANTAGE 1: It Saves Money

There is little dispute that the use of volunteers cuts costs. Of the two categories, community-based service is by far the most cost-effective because there is very little overhead. An office of a state department of transportation (or other public funding source) can initiate a community-based program by merely providing a van and subsidizing vehicle insurance and maintenance costs.

While volunteer transportation of any kind is cheaper than any comparable system where paid drivers are employed, the amount of savings varies considerably from program to program. Agency-based services will be more costly than community-based services because of the administrative overhead involved in running an agency. Many factors influence the cost of service in agency-based programs as well. In some cases, for example, a mixture of paid and volunteer drivers is preferred. The mixture of owned to non-owned vehicles will influence costs dramatically.

Rather than attempting to present exhaustive and detailed cost-analyses of various programs, a simple example will be given to demonstrate the potential for savings when using volunteers. For this purpose it will be assumed

that administrative overhead such as rent, phones, staff salaries, etc., is constant either way.

In our example, we will compare hiring one paid driver and purchasing one van with recruiting ten volunteer drivers (each driving 1/2 day a week) driving their own cars. Five of the volunteers will take 25 cents a mile reimbursement; two will take 12 cents a mile; three will claim none (in recognition of the fact that not all volunteers are reimbursed for their mileage). 24,000 miles are driven each year.

Annual costs associated with paid driver and purchased vehicle:

Salary & Benefits	\$12,000
Vehicle Insurance	2,500
Cost of Van	6,000*
<u>Maintenance, Gas & Oil</u>	<u>2,000</u>
Total	\$22,500

* \$30,000 prorated

Annual costs associated with volunteers in their own vehicles:

Mileage reimbursement	\$ 3,240
Excess non-owned auto insurance	150
<u>Volunteer liability insurance</u>	<u>300</u>
Total	\$ 3,690

The American Red Cross, Santa Cruz Chapter, offers a real life example of the savings one can expect from volunteer transportation. They submitted a cost analysis to their County Transportation Commission for a component of service that involved providing medical trips to destinations out of the county. The trips often took over 10 hours to complete. Lift Line, a transportation program operated by a private, not-for-profit agency, quoted a cost of \$69,966, using agency owned vans and paid drivers. The Red Cross, using volunteers driving a Red Cross van, quoted a cost of \$22,519. Largely because of the cost savings, Lift Line now contracts with the Red Cross to provide the rides.

The national office of American Red Cross published the findings of a cost study in a publication called Guidelines for Transportation Services. The conclusion: "In general, the operating cost can be reduced by between 1/3 and 1/2 through the use of volunteers."

DISADVANTAGE 1:

Success Depends on Voluntary Citizen Commitment

Anyone who has ever run a volunteer program can attest to the inherent challenge in this statement. This first disadvantage parallels "saving money" because the savings result from voluntary citizen involvement. Continuing to replenish the ranks of volunteers with well-qualified, well-trained, responsible, and willing drivers, schedulers and dispatchers (and administrators and Board members if community-based) is usually the single greatest problem faced by volunteer systems, especially those that are in it for the long haul. Once the first flush of excitement fades, the reality of volunteer attrition and the need to continually recruit a stream of new volunteers can be an immense challenge.

This is less of a disadvantage for community-based services because high visibility in small towns makes for relative ease with volunteer recruitment.

ADVANTAGE 2:

It Is Compassionate

Compassion is defined as sympathetic consciousness of other's distress together with a desire to alleviate it. Volunteers have many motives, some of which are self-oriented. Regardless, nearly all are motivated to help their fellow man—to express compassion.

People who need specialized transit are mobility disadvantaged. They don't drive and either can't ride the bus or one isn't available to them. Specialized transit is therefore a lifeline, linking the individual with society-at-large. Providing transportation to these people is a compassionate act, to be sure. Using volunteers adds a special dimension. A passenger may ride with a different volunteer each trip, being thereby exposed to a wide variety of caring people. Such contact is important to people otherwise cut off from the normal weave of our social fabric.

DISADVANTAGE 2:

It Can be Unpredictable

Using volunteers can cause unpredictability, depending largely on the degree of difficulty

with recruitment. If there are plenty of drivers and ample back-ups, the service can be carried on with a great deal of predictability. A shortage of drivers can cause unpredictable service interruptions.

However, because volunteer transportation can be unpredictable, people who have not been associated with a well run volunteer program may assume that volunteer drivers are unreliable. To the contrary, most program managers claim that their volunteers are reliable to a fault.

Bob Williams of the Mile High Red Cross chapter has an 84-year-old volunteer who drives three full days a week—rain or shine—sick or well. Bob says, "He's as dependable as a clock." Bob went on to say, "Last year 17,000 free hours were donated by volunteers who drove 152,000 miles—never beyond the boundaries of the city—accident free. My volunteers are very careful, not even a fender rub or bump. They are responsible and reliable. They look at it as their job."

ADVANTAGE 3:

It Builds a Better Community

While our homes and cars tend to separate us from each other, volunteer transportation bridges these gaps—giving people the opportunity for positive, life-affirming interactions.

Volunteer transportation programs improve communities in four other ways:

1. by conserving tax revenue,
2. by promoting voluntary action,
3. by involving seniors productively,
4. by helping people live independently who otherwise might have to be institutionalized.

Community-based services are especially effective at community-building. In Indiana, for example, the volunteer programs that are sponsored by the Area IV Agency on Aging have come together and been enlivened by an effort that has involved and benefitted nearly every family in town one way or another. (See the program summary in the Appendix.)

DISADVANTAGE 3:

Labor or Competing Private Companies Might Object

Labor may object to the use of volunteer drivers where paid drivers might have been employed. Private transportation companies seeking to expand their businesses may feel the use of volunteers gives the non-profit agency an unfair advantage.

The legitimate concerns of labor and private industry must be weighed carefully against the many benefits a community stands to gain from a volunteer transportation program.

ADVANTAGE 4:

It Is Extremely Flexible

There is no such thing as generic volunteer transportation, though there are many models that can be copied. It is a flexible, adaptable tool which can take many forms with nearly limitless applications. It can be a paragon of simplicity or extremely complex. It can be the entire transportation system in a county or simply one piece of a larger puzzle.

To a planner, designer, or administrator, such flexibility can be quite attractive. One can hone a program to meet specific needs.

DISADVANTAGE 4:

It Won't Work Everywhere

Even dyed-in-the-wool, hard-core volunteer transportation advocates have to admit that it won't work in every town, city, or county. What makes an environment receptive to volunteer transportation is explored in the questions that follow the discussion of the advantages and disadvantages.

ADVANTAGE 5:

It Can be Enjoyable

With a twinkle in his eye, Henry Eaton, the former Coordinator of Sonoma Care-A-Van, told how enjoyable volunteer transportation can be. He said volunteering with Care-A-Van is like belonging to an exclusive club: one that happens to provide direct community service. The volunteers of Care-A-Van have a good time. They enjoy each other's company and get a great deal of pleasure driving the length and

breadth of Sonoma, kibitzing with friends and neighbors along the way.

Most professional managers agree that the greatest joy in volunteer transportation is the interaction with the volunteers themselves. The satisfaction of working with such dedicated, altruistic human beings who are there because they want to be, accompanied by the knowledge of the good that is being done in the community, brings a rare sense of fulfillment. Akin to the ideal of "right livelihood," volunteer transportation offers a different kind of enjoyment than that which can be bought and sold in the marketplace.

DISADVANTAGE 5:

It Can be Stressful (Especially for the Program Coordinator)

While the rewards from volunteer transportation are plainly evident, the organizational and management challenges are often stressful. To succeed, programs must be well organized so the headaches are minimized and people have time to enjoy one another.

The level of stress generally rises in proportion to the number of trips provided. Simple services in rural areas with plenty of community support produce little or no stress. Large numbers of trips, volunteers, and passengers in complex and diverse routing patterns raise the stress level.

Mikki Kraushaar, whose organization, Silver Key Senior Services, provides 96,000 rides annually, concurs. "Transportation is very intense," she says. "In the morning, as soon as you step in the office, the phones are ringing, drivers are arriving and picking up schedules, the elders are calling to schedule new rides or change or cancel rides for that day. There may be emergency needs to attend to, vehicle breakdowns, and so forth. The manager can simply become weary. He or she must take time off when needed in order to avoid burn-out. This is true, though, of all social service professionals working directly with people in need—death, dying, isolation, poverty. On the other hand, every day we are solving problems, bringing light and love to those in need. It is as if we are on a mission. If it were just a job, people would have burnt out long ago."

The following advantages and disadvantages apply to community-based programs only.

ADVANTAGE 6:

An Entire Population Can be Served

Agency-based services could theoretically serve every transit-dependent person in a community, but most don't. Instead, agency-based services usually exist in larger population centers where there are many other agency and government services. They usually help a specific client population, e.g. the elderly and disabled.

Community-based services are organizations of, by, and for the community at large. They are therefore naturally suited to providing unrestricted transportation services. Many times they are the only transit or specialized transit service in town. Being the public transit, they either provide a fixed-route service, or take groups on trips to major population centers where goods and services are more available. In either case there are no restrictions on ridership or trip purpose. The ballpark is as welcome a destination as the doctor's office.

DISADVANTAGE 6:

Individual Demand-Response Is Difficult for Community-Based Services to Provide

Taking individuals to appointments on an advance-reservation basis is a much more difficult management task than either fixed route transportation or pre-arranged group trips. Because of their management expertise, agencies are usually more capable of tackling door-to-door transportation than are community-based organizations.

If door-to-door transportation is the pressing need in your community, it is best to consider an agency-based service.

ADVANTAGE 7:

High Visibility Makes for Ease with Volunteer Recruitment

Community-based services typically serve small towns. It doesn't take long for everyone to become aware of the service. Such visibility is difficult to attain and sustain in urban environments like Santa Rosa where agency-based services like Volunteer Wheels must compete

with hundreds of other worthy causes. Because of their high visibility, rural community-based programs generally do not struggle with volunteer recruitment as do agency-based programs in large population centers.

DISADVANTAGE 7:

Attracting Board Members with the Necessary Skills May Be Difficult

The very same small town where familiarity makes recruitment easy often lacks ample numbers of highly skilled potential Board members. The difficulty of finding qualified Board members is exacerbated in small towns when personality conflicts arise, or when one particular individual is overly dominant, to the detriment of the group.

And so you have the 7 fundamental pros and cons of volunteer transportation.

Far too often people unfamiliar with volunteer transportation make daunting statements like, "Oh! I'd never consider using volunteer drivers. They're too difficult to manage." Volunteer transportation poses a challenging management task, to be sure. In your particular case, the disadvantages may outweigh the advantages and you may decide not to use volunteers. But if the advantages surpass the disadvantages, rest assured that managing a volunteer transportation program is not an impossible task by any means. The many years of successful volunteer transportation represented by the services described in this book ought to be satisfactory data to forever dispel the "too difficult to manage" myth. And these are only a fraction of the programs operating successfully in America today.

Even with its dilemmas and puzzles, most volunteer transportation program managers swear by it. Mikki Kraushaar of Silver Key Senior Services speaks for the rest when she says:

"The benefits of using volunteers far outweigh the problems."

QUESTION 2:

Is the Proposed Service in Competition with Other Specialized Transit Services?

A survey of existing transit and specialized transit services will quickly reveal whether or

not your proposed service is duplicating another. Meet only needs which aren't currently being met. Clearly identify the need you are trying to meet. Be very precise. If you want to go into business because you don't think the existing specialized transit service is doing well enough, consider meeting with them to find a way to coordinate services so you are not competing. Alternatively, there may be a way to strengthen the existing program without starting another one.

QUESTION 3:

Is there a Strong Sponsoring Agency?

Regardless of whether you are starting a community-based or an agency-based service, there will most likely be a sponsoring agency. With community-based services, the sponsoring agency helps to organize and fund the program, leaving the responsibility for daily operations to the community itself. With agency-based services, the sponsoring agency is responsible for all aspects of the program.

A community-based service is usually implemented in environments where an agency-based program is inappropriate, e.g. a small farm town in Indiana that isn't large enough to be served by an agency such as a Volunteer Center or Red Cross chapter. Community-based services work extremely well in rural populations and in some urban communities where groups of people have similar needs and concerns and are willing to band together to help one another.

In some communities there is ample leadership and funding from within the population to self-generate such a program (as with the town of Sonoma that started Care-A-Van). When this is not the case, an agency like a Department of Transportation or an Area Agency on Aging can act as combination broker and midwife. In such instances, whoever is charged with coordinating the effort must have special abilities.

Success with motivating a wary population will depend upon this individual's personal powers of persuasion, entrepreneurial skills, and personal commitment to the idea. The idea must be sold. People will respond to honesty and enthusiasm. Once the selling is over, the coordinator must guide the program into existence—then stay with it as it grows.

Obviously, the sponsoring agency for a community-based program needs to be fiscally secure and committed to the philosophy of community-based volunteer transportation so that the service is ensured the stability of continued support over the years.

On the other hand, starting an agency-based program requires first finding the right agency to operate it. An agency is evaluated by their stability, their track record with other programs, and their commitment to volunteerism.

Look to agencies with strong Boards of Directors and competent professional staff. Dedicated Board members who are actively involved in setting policies, raising funds, and representing the agency in the community will provide a transportation program with the necessary guidance and stability for success. An experienced and skillful professional staff is also essential. The Volunteer Center of Sonoma County, for example, is known for its strong Board and good management. Not surprisingly, the programs run by the Volunteer Center, such as Volunteer Wheels, are generally successful.

It is also critically important to be certain the agency will be able to procure adequate vehicle insurance. Because the price and availability of vehicle insurance has become a real stumbling block for some agencies, American Red Cross chapters may have a distinct advantage over others due to the inexpensive insurance available from their national organization. Programs that belong to insurance pools can also generally count on long-term availability and price stability. Services relying entirely on the private insurance market can be literally driven out of business without warning in a tight insurance market, whether or not they use volunteers. This happened to two programs in Sonoma County during the last insurance crisis when they couldn't afford sudden 100% to 200% premium increases.

QUESTION 4:

Are Operating and Capital Funds Readily Available?

Funding for transportation is in two categories: 1. operating funds and 2. capital funds. Operating funds include all of the money required to provide the service on a daily basis.

These are called administrative and operating costs. Capital funds are for the purchase of land, buildings, and depreciable equipment, including vehicles.

What follows is a list of likely operating funding sources and expense items for an agency-based volunteer transportation program. A typical operating budget will include some or all of these line items.

Income

Contributions	Special fund-raisers
United Way	County and City contracts
Fares	Miscellaneous

Expenses

Salaries	Health benefits
Retirement benefits	Workers compensation
Payroll tax	Contractual services (i.e. audit, consulting, etc.)
Office supplies	Postage
Rent (w/maintenance)	Equipment maintenance
Printing	Mileage & meals: staff
Conference & training	Mileage & meals: volunteer
Fuel	Vehicle maintenance
Dues	Volunteer recognition
Depreciation	Telephone
Miscellaneous	

Insurance Expenses

General liability	Excess auto for volunteers
Volunteer liability	Vehicle

Capital funds usually do not appear on an operating budget. They are accounted for separately. Likely sources for capital funds are the state and federal government, foundations, service clubs, and fund-raising events.

How much of either category of funds a volunteer transportation program will require depends entirely upon its structure and complexity. A small, church-run program may need very little money. A complex, county-wide, agency-based program may have operating and capital costs that amount to hundreds of thousands of dollars each year.

When starting a program, first project the expenses. Such a projection will establish the need for funds. Be certain there is a reasonable likelihood of acquiring the money before proceeding further.

Since the source of funds differs dramatically from state to state and locale to locale, the broad suggestion is to research this matter carefully. For operating assistance, explore the most logical alternatives such as United Way or your city or county government first. For capital assistance, consult with local foundations, or foundations either interested in funding transportation or helping your particular client group. As will be noted later, the federal government assists with local van purchases through the Urban Mass Transportation Administration's 16 (b)(2) and Section 18 programs. The grantee must raise a 20% match in order to receive the other 80% of the total cost of the van from the government. Some state governments help with van procurement as well.

In almost all cases, there will need to be local fund-raising efforts to augment whatever grants and contracts are available.

Some agencies rely heavily on passenger fares or donations in addition to funds received from other sources. Others do not. Whether you will or won't depends on your operating philosophy and your need for additional revenue.

That there will be costs associated with volunteer transportation is undeniable. Make certain these expenses and the revenues to offset them have been adequately anticipated and that there is a stable source of continued funding available to the program.

QUESTION 5:

What Is the Probability of Success with Volunteer Recruitment?

Questions 1 through 4 are often easier to answer than this final question, especially if your community does not have a history of supporting volunteer activities. Because volunteer drivers are in many cases more difficult to recruit than volunteers who do not have to operate motor vehicles, recruiting for volunteer transportation can be a struggle, even in communities where people generally volunteer.

Community-based programs generally have an easier recruitment task than agency-based programs, especially urban agency-based programs. This is because word-of-mouth is the most effective volunteer recruitment tool and rural community-based services use word-of-mouth recruiting to best advantage in their small towns.

Here are some things to look for when determining if an agency-based service will most likely succeed with volunteer recruitment:

- Does your community have a rich historical identity with a track record of voluntary support of local causes?
- Do you have an active Volunteer Center with good experience in volunteer recruitment? If not, are there other agencies in town that have had good success with volunteer recruitment over the years?

Are there special reasons why people might pull together in the spirit of self-help? For example, the American Cancer Society appeals to people whose lives have been touched by cancer.

Towns have distinct personalities, as distinct as their history. Some tend to support voluntary activities and others don't. If there is no evidence of volunteerism, find out why. Then decide if you want to be the ice-breaker.

Sonoma County, California, offers clear examples of both end zones. The town of Sonoma (the home of Sonoma Care-A-Van) is the quintessential California retirement/tourist town that everyone loves, identifies with, and wants to nurture. It is very old by California standards, dating back to the Mexican rule of California. Being a small town with a cheery ambience, it attracts affluent retirees. This is fertile soil for volunteer transportation. On our scale, this is a 10+.

In contrast we have the town of Rohnert Park, 25 miles to the west of Sonoma as the crow flies. Rohnert Park is a very new town, born in the 1950's. It used to be a seed farm owned by Mr. Rohnert. It is now a middle-class bedroom community. It does not have a large retirement age population compared with its

neighbor to the east. People are, by and large, busy making a living. Therefore, on our scale, Rohnert Park is less than a 5 with respect to the ease of volunteer recruitment.

The City of Rohnert Park does sponsor a small volunteer transportation program to serve primarily its elderly. It has operated this service successfully for a number of years because the City of Rohnert Park is a stable sponsoring entity which provides adequate funding, and there are no other specialized transit services in town with which to compete. If these elements were not well in place—say they lacked support from the city—the energy required to maintain a volunteer transportation program might be prohibitive.

Conclusion

This illustration is not meant to elevate one town or cast aspersions on another. It is merely used to demonstrate how you can analyze a community to determine the probability of success.

Take a minute now and rate each answer to these 5 questions on a scale of 1 - 10. If two or more answers score less than 5, volunteer transportation may not be the best choice. Question 4 may score low because a shortage of funds is why you are considering volunteer transportation in the first place. If so, be certain most of the other questions are answered favorably, and that there is at least enough money to operate the program.

Rating 1 - 10

- Question 1: Advantages/disadvantages? _____
- Question 2: Competition with other services? _____
- Question 3: Sponsoring agency? _____
- Question 4: Availability of funds? _____
- Question 5: Probable success with recruitment? _____
-

If the answers to these five important questions encourage you to start a volunteer transportation program, the next step is to plan and implement your program.

Getting Started

Each new volunteer transportation program ought to be a creative and somewhat original response to a particular community's needs and resources. Transportation systems which arise in this way have their own unique personality. Being well-suited to their environment, the outlook for their long-term survival is good.

Though each new program should be individually crafted, it is desirable and beneficial to learn from and borrow as much as possible from other successful programs. You may wish to use one of the eight systems featured in this book as a model. In addition, the Community Transportation Association of America has compiled a list of experts in various areas of knowledge who can provide technical assistance based on their first-hand experience. (See Appendix for information about the CTAA TransNet.)

Starting a simple volunteer transportation program can be easy. It is done quite often by churches and other organizations that need to provide transportation inexpensively to their members. Starting such a program is mostly a matter of common sense. People interested in starting a simple system shouldn't be intimidated by this book. It is written to address some very wide-ranging concerns. Use whatever information applies and then follow your instincts. You'll learn as you go.

On the other hand, those wanting to provide volunteer specialized transit to an entire community need as much useful information as possible. While this chapter may not provide all the detail you need, it ought to give you the information you need to proceed with confidence.

(Those already operating a volunteer transportation service are advised not to skip this chapter, even though some of the information may seem elementary. At the very least, the discussions of van ownership and computerized scheduling ought to prove interesting and worthwhile.)

Mikki Kraushaar of Silver Key Senior Services remarked, "Regardless of how your program works, it is so critical that you have a sound program design and structure. Because if you don't have sound procedures and design, regardless of how many paid staff or volunteers you have, it won't work!"

Begin by asking broad questions.

- Who are we?
- What do we want to accomplish?
- Who will we serve?
- What program design will fit the peculiar needs of our environment?
- What are our resources, and how can we make best use of them?

Brainstorming is time well spent; in fact, it is essential for success. While brainstorming is confusing at times, it's also exhilarating because it is creative.

The first step is to paint the picture with a broad brush. Develop a vision of what your program will become. Let the ideas fly. Don't edit any as too silly or too off-the-wall. Inspiration and intuition are playful energies, never ponderous, solemn, or dry. Eventually you'll just know you have it. You will have captured the vision.

Next, get down to the nitty-gritty details...start with the obvious questions:

- Will you hire paid dispatchers and schedulers?
- Will you have a full-time paid coordinator?
- Will you have volunteers drive their own vehicles or yours?
- Will you charge a fare?
- Will you offer mileage reimbursement to the volunteers? If so, how much?
- Will you have an eligibility criteria?
- Will you be an advance-reservation or same-day service, or a combination of both?
- Will you limit destinations and trip purposes in any way?
- Will you use volunteer drivers only or a mixture of paid drivers and volunteer drivers?
- How will you advertise the program?
- What is your marketing plan for recruiting volunteers?
- Is your funding base stable? If not, what can be done about this?

This is only a partial list. Many other questions will arise as well. Try to think out each detail of your service *before* you begin providing rides. Start small so you have the time and space to work out the kinks. Recognize that as you grow your questions will change, as will your answers. Eventually these answers will comprise the policy statements that guide your program. As soon as possible, write a handbook for your volunteers explaining these policies, giving them the information and direction they need to succeed. (See Volunteer Wheels Handbook in the Appendix.)

Of course, if you are starting a community-based service, creating a Board of Directors and by-laws is the first step. Then the Board can brainstorm their vision for the program and set their operational policies.

Establishing by-laws for a community-based program is critical to its success because it will guide the activities of the Board. (The Appendix contains a sample of the by-laws used in Indiana.)

Jean Engelke offers some excellent advice on working successfully with a community-based Board of Directors.

The paid staff person who supervises the program must attend all the Board meetings, or almost all, and stay on top of the shifting attitudes as new people come on. You must always pay attention and not sit back expecting it to run itself. Employed professionals can fill responsible positions on the board because they may have appropriate administrative skills and know how to conduct good meetings. But you must have a predominance of "workers" to succeed. The doers are usually the elderly because they have the time.

Don't strive for sophistication. These Boards are generally relaxed, "down home." This is appropriate. Don't tamper with it. Their friendliness and neighborliness is their strength.

Lastly, never forget that the Board is the program. Without the Board there is no program. They run it, make the decisions, recruit the drivers and so forth.

Those interested in creating a community-based program are advised to read the summary of the Area IV Agency in the Appendix and to contact Ira Doom or Jean Engelke for additional guidance (see Appendix for phone numbers and addresses.)

As you start your program, there will be many obvious details to attend to such as setting up an office, creating a budget and advertising your service. We will not belabor the obvious here. However, there are three important elements that deserve some discussion. They may apply to a community-based or agency-based service.

1. Deciding whether or not to hire a paid coordinator.
2. Deciding whether or not to purchase your own vehicles.
3. Deciding how to schedule and dispatch rides.

Hiring a Coordinator

While most community-based programs will administer their programs with volunteer coordinators, it is a widely-held opinion that most agency-based volunteer transportation programs ought to have professional management. Dr. Hood in his book *The Volunteer Transportation Program* asks the question "Having decided to use volunteers, does an agency need a director of volunteers?" He answers his question with "an unqualified, yes!" He goes on to say, "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)." The skills required of a volunteer transportation manager are described in some detail in Chapter Five.

Whether the coordinator is a volunteer or a paid staff member, whoever assumes a leadership role must approach their tasks from a responsible, "professional" point of view. If such volunteers cannot be recruited, professional management will be necessary.

Purchasing Vehicles

There are two widely-held myths about volunteer transportation. One is: "volunteers are too difficult to manage." The other goes something like this: "if we could just buy a van we could easily provide transportation." If you believe that, be advised—owning a van, particularly one that is retrofitted with a lift, can be more trouble than you anticipate. Furthermore, owning a van doesn't ensure that transportation will be provided. It is only one of many steps.

If you intend to use volunteer drivers, a van may not be the best choice at all. Recruiting volunteers to drive their own cars may be a much

more economical and functional option, depending on your circumstances.

While vans are useful and are sometimes essential (as when physically disabled or groups of people need rides), most agencies are not forewarned about maintenance, insurance, and capital replacement costs involved with van ownership. They also rarely realize how expensive vans are to buy (even with federal assistance); or how expensive they are to operate and repair; or how quickly they wear out; or that a back-up van is necessary if you're promising a significant level of service. This is not meant to discourage van ownership where appropriate or necessary. It is meant to be a splash of cold water in the faces of those who don't really need to buy a van.

When do you need a van? If you're transporting physically disabled people, you'll need lift-equipped vans. If you're providing fixed-route service, you'll need vans. If you're transporting lots of groups, vans are the ticket. But if you are driving seniors to periodic medical appointments on an advance-reservation, door-to-door basis, volunteers driving their own cars are an excellent option.

Volunteer Wheels provides half of the 36,000 annual rides with volunteers driving their own cars. Silver Key Senior Services also uses volunteers who drive their own cars to augment their van service. The American Cancer Society in Sonoma County uses only volunteers driving their own cars (using taxis in emergencies only.)

Volunteers driving their own cars bear the capital replacement cost of the vehicle. The volunteers attend to the repairs and maintenance, and they buy the primary insurance coverage. While the agency may or may not offer mileage reimbursement, considering the additional risk involved, it ought to provide excess liability insurance coverage. Many agencies offer mileage reimbursement as well. This is optional. Be advised, though, that some volunteers cannot drive without financial assistance to cover their costs. Others need no reimbursement and are pleased to donate their time and their car.

The question of risk has been raised in connection with volunteers driving their own cars,

since the agency apparently has little control over how the cars are maintained. History has proven the risk to be very minimal if the agency recruits responsible volunteers. Responsible people tend to take care of their equipment responsibly, especially their personal cars which have their family's lives at stake.

In Sonoma County, the American Cancer Society and Volunteer Wheels have had decades of trouble-free operation using volunteers driving their own vehicles. Other programs in America have had similar good experiences. It is strongly recommended that program managers road test new volunteers in their own cars so the general condition of the car can be ascertained along with the driving skills of the volunteer when determining if he or she is appropriate for your program.

Private autos do present one significant drawback. Cars come in every shape and size, with widely varying passenger capacities. The complex task of routing demand-response rides is made even more complicated when some cars accommodate one passenger and some take three or four. Volunteer Wheels keeps careful track of each vehicle's capacity and codes each passenger's ambulatory ability in the computer so that people can be matched with vehicles efficiently and ridesharing can occur whenever possible.

One final note about volunteers driving cars: some prefer to drive a car but not their own. In some cases their personal car is inappropriate (a jeep or truck that is difficult to get in, for example). Volunteer Wheels has solved this by soliciting donated cars which we insure and maintain. A car is considerably less expensive to insure and maintain than a van. For economy we always try to use the smallest appropriate vehicle.

If you do decide to purchase or lease vans, here are some points to consider.

Look to local service clubs to help raise the 20% matching funds necessary to purchase a van with federal assistance.

Vans in service every day depreciate quickly. Your long-range planning must anticipate their replacement. If possible, set up a capital replacement fund in your annual budget so that you are accumulating replacement dollars each

year. Remember, too, you must have a back-up vehicle. Henry Eaton of Sonoma Care-A-Van remarked: "People will come to depend upon you for transportation. There's considerable hell to pay when something breaks down and you don't have a replacement."

Regarding maintenance, go to the best possible shop with well-trained, reliable mechanics who know how to maintain your particular vehicle. Don't cut costs in the area of maintenance. Put safety first, always. Vans can be complicated to repair and may require special expertise. Make sure they are being repaired by people who know what they are doing.

Vans come in many shapes and sizes, with a wide variety of seating capacities. There are private companies who specialize in retrofitting vans to accommodate wheelchair usage. Because vans are large, heavy, complex vehicles, they are by nature expensive to own and maintain. Adding features such as raised roofs, larger air conditioner units, wheelchair lifts and tie-downs only makes for more involved maintenance issues.

There are a number of ways to load a passenger in a wheelchair onto a van. The simplest is to use a ramp and push them on. Most people prefer an automatic hydraulic lift.

Lifts can be dangerous. They must be operated with care and concern for the passenger's safety at all times. The person in the wheelchair must be securely on the lift platform with the wheelchair brakes firmly applied. The operator must stay physically near the passenger as the lift is operated.

It is critically important to have lifts serviced by knowledgeable, competent professionals.

If you don't need to purchase vans with lifts, you may want to lease them. The Mile High Red Cross chapter leases their vans. Their contract includes a maintenance agreement. They feel this is no more costly, and much easier to manage, than purchasing a fleet of vans. They may be right. It is certainly something to consider if you must use vans.

And finally, if you operate agency-owned or leased vehicles, it is likely you can purchase gas at a discount from your Department of Public Works or local transit agency.

Scheduling and Dispatching Rides

The basic concept of scheduling and dispatching rides is simple. Someone asks you for a ride and tells you when and where they want to go. You pick them up, deliver them on time, and take them home. You've scheduled, dispatched, and completed a ride.

Volunteer transportation programs typically operate in one of two ways:

1. A volunteer is assigned in advance to one passenger, usually for a long trip. They pick up the client at the appointed day and hour, take them to the doctor or wherever, wait for them and take them home. This method is most commonly used for rural transportation. It is the simplest and easiest-to-manage form of volunteer transportation.
2. Volunteers pick up passengers on pre-scheduled routes, or on a radio-dispatched, same-day basis. The driver does not wait for the passenger to complete their appointment but goes on to pick up other passengers. That driver may or may not go back to pick up the passenger at a later time, depending on which driver is closest when the passenger is ready to return home. This method is commonly used in urban settings where large numbers of rides must be delivered each day.

The second option is obviously the more complex and demanding as far as scheduling and dispatching is concerned. Volunteer Wheels employs both modes because we provide a rural and an urban service.

Most rural systems function best on an advance-reservation basis so the scheduler has the time in advance to arrange for a volunteer driver. Urban programs operating in the second mode must decide if they want to schedule the rides in advance, or provide same-day service. Some prefer to do a combination of both; some tend strongly in one direction or the other. Each method has advantages and disadvantages.

Advance-Reservation Scheduling

The drawbacks to scheduling all rides in advance are:

1. The scheduling system must be relatively sophisticated.
2. A great deal of time and effort will be spent scheduling rides and keeping up with all the changes.
3. There will be cancellations and no-shows, especially if your clients are elderly and frail. It is difficult for them to predict their health with any certainty days in advance of their ride. The farther ahead you schedule, the bigger the potential problem. Volunteer Wheels schedules up to two weeks in advance. To control cancellations and no-shows, we call the clients the day before their ride to confirm, which only partially solves the problem because the confirmation call is still made 24 hours in advance of the ride.
4. The clients must anticipate their needs well in advance. If an unforeseen need for transportation arises, they may have no other option but to call a cab, if indeed they are able to ride in an auto and don't need a lift-equipped van.

The benefits of advance scheduling are:

1. Your daily trip-load is known in advance.
2. You can plan ahead for how many volunteers you will need each day.
3. It allows for efficient routing of drivers to conserve mileage.
4. The passengers can plan ahead, knowing that their transportation has been arranged.
5. Your drivers do not have to be in radio or telephone contact because they leave the office with their entire

list of rides. This is important for programs whose volunteers drive their own cars without two-way radios. (However, Volunteer Wheels provides each volunteer with a paging device to be able to inform them immediately of cancellations and changes in their schedules. This is preferable but not essential.)

Same-Day Scheduling

With same-day scheduling, the only rides scheduled in advance are those which repeat every week. It only makes sense to schedule the on-going rides in advance. All other trip requests are dispatched on the day the ride is needed. The drawbacks of same-day service are:

1. You will need a sophisticated dispatching system, particularly if you are providing numerous rides. You must devise a method to track the location of each vehicle so it can be dispatched to the next nearest pick-up point when available. There are a number of ways to do this. The most common is to use a wall-size city map and move magnetic pegs or stick pins around as the vehicles circulate through town.
2. You will spend a great deal of time and effort dispatching.
3. It isn't always possible to route the drivers efficiently because you are responding to needs as they arise.
4. It is difficult to plan for how many volunteer drivers will be needed each day unless your daily trip loads are very predictable. (Volunteers do not like to sit idle, and are likely to quit if not well employed.)
5. You will need to be in radio or telephone communication with each driver.
6. The client cannot plan their transportation in advance with certainty.

The benefits of this mode are:

1. You will experience little or no difficulty with cancellations and no-shows.
2. The client can call on the day they need a ride without having to plan their transportation in advance.
3. Your scheduling system can be very uncomplicated.

As you can see, there is no clear advantage to one scheduling mode or the other. However, the choice is an important one and needs to be considered well, taking the various factors and the advantages and disadvantages into consideration.

If your system is very small, you can experiment and see which scheduling and dispatching modes fit your needs best.

Most small to mid-size systems schedule the take-out rides in advance and ask the passengers to call the office when they're ready to go home. Volunteer Wheels used to function like that. The dispatcher then recorded the pick-up requests when the clients were finished with their appointments and dispatched the next available driver.

This worked well in the early days when we had very few passengers. It did, however, require a very active and skilled dispatcher to coordinate the pick-ups with the available drivers.

As we grew, this method of dispatching became a bigger and bigger challenge. On some days, it was virtually unmanageable. At times we experienced dispatching gridlock. All too frequently ten or fifteen passengers were delayed for one, two, or three hours because their return ride requests bunched up at the end of the day when we had the fewest available drivers.

Our solution was to pre-arrange both legs of the journey. There were real fears this wouldn't work because doctors can often be so unreliable with regard to seeing their patients on time. Our response was to anticipate these delays and pad the schedule a bit. Padding the schedule works well most of the time.

Pre-arranged returns have eliminated the nightmare of dispatcher's gridlock by making our schedule much more predictable. It reduced the dispatcher's role considerably and put the burden almost entirely on the schedulers. We found we had to computerize our scheduling system to accommodate the additional scheduling activity. We also had to shift from volunteer schedulers to paid schedulers. However, this was a good solution for Volunteer Wheels. It brought order to what had become a somewhat chaotic environment due to our size and complexity.

The Mile High Chapter of the American Red Cross has another wrinkle to add to the scheduling and dispatching discussion. They ask the doctor's office to call their office and schedule all the rides for the clients, rather than asking the passengers to call and schedule their rides. This they feel is easier on everyone and more efficient. It is an idea well worth considering.

The information that needs to be recorded when scheduling a ride will vary from program to program. One thing that never varies is the paramount need for accuracy. Make certain your information is complete and accurate. If you schedule rides in advance, you will need a facile method for cancelling and re-shuffling rides and client information. Here is a sample of the form we used at Volunteer Wheels when we scheduled by hand.

<i>Appt. Time:</i>	<i>Client:</i>	
9:00	Bob Johnson	578-3200
No. of people: 2	4256 14th St.	Driver's initials:
Wheelchair: yes	Santa Rosa	To: bw From: ac
Scheduler's init.: ds	Destination:	Called: 12:05
	Dr. Smith	Dispatched: 12:30
	2200 Apple Way	Pick-up time: 1:00
	Santa Rosa	

This scheduling system allowed us to schedule the take out and dispatch the return on the same form. The time the client called to go home was recorded by the dispatcher. When a volunteer driver telephoned the office they were told which client to pick up (the volunteers had been given a list of all the rides that day to refer to for addresses and so forth). The time the ride was dispatched was recorded by the dispatcher. At the end of the day when the driver returned to

the office we would record the actual pick-up time. In this way we tracked the time intervals involved.

We printed label copies of this form with stick-um on the reverse side. When there was a cancellation or a change, we pasted over the cancelled ride so a new one could be scheduled in its place.

Changing to entirely pre-scheduled rides meant that the take-out and return rides had to be scheduled separately by hand. This proved unmanageable, so we decided to computerize our scheduling system.

Computers are useful when processing great amounts of rapidly changing data. In many ways, specialized transit is a perfect application for the computer's ability to process information. But beware: computers have the remarkable ability to make your life easier and harder at the same time. The rule of thumb: don't computerize until you have to. Volunteer Wheels needed to computerize when our annual trips exceeded 30,000. It is difficult to establish a certain number of rides as the benchmark because programs differ so greatly.

Here is a sample computer scheduled ride.

<i>Appt.</i>	<i>Client Name</i>	<i>Pick-up</i>	<i>Drop-off</i>
9:00	Smith, Fred (707)544-001	Home 1916 Broadway Santa Rosa	National Dental 1200 Main St. Santa Rosa
Ambulatory rating: A (ability to get in and out of cars.)		Cross St.: 4th G-9 (map grid)	H-8
		Trip notes: at the back door Trip ref: 10:30 (the return time)	

This ride describes picking up the passenger at home and dropping him off at the dentist. The return ride (scheduled for 10:30) will appear in the 10:30 time slot with all the same information, except the pick-up and drop-off are reversed.

The advantages of the computer are:

1. The client list is on a permanent data base.
2. Names and home addresses don't have to be re-copied each trip.
3. Rides can be created and erased with relative ease.

4. Ridership statistics are compiled easily and accurately. (The computer could keep track of our maintenance records as well, if our fleet size warranted it.)
5. Special information about the client or the specific trip can be added or deleted easily.

When we decided to computerize our first step was to form a committee composed of Volunteer Center Board members and computer experts from the community. Three years were spent meticulously researching available software and hardware to see if we could find something to suit our needs. We discovered that creating our own software program from scratch was financially prohibitive. We could not find any "off-the-shelf" software that complemented our program design.

Finally we discovered a generic software program developed by the Urban Mass Transportation Administration. It provided a basic format which we spent many, many hours redesigning and modifying. Fortunately, our programmer worked as a quasi-volunteer, charging a significantly reduced rate. If we had had to pay the going rate for professional programming we could not have afforded it.

When all the modifications were in place we switched from hand scheduling to computer scheduling. In our very first year we had a full 10% increase in rides. That's over 3,000 rides we weren't providing because we couldn't manage our information as well by hand!

But a computer is not a genie in a lamp. Once you decide to switch from hand scheduling to computerized scheduling you have entered a new silicon reality with its own rules, its own vocabulary, and its own challenges. There will be much to learn.

There are now software programs that can be purchased "off-the-shelf" designed specifically for specialized transit. But beware: they may not exactly suit your needs and you still may have to do expensive modifications. Buying hardware is a complex and difficult task, as well. Your hardware and your software must match. It is better to listen to a trusted advisor than an eager salesman when choosing hardware.

When your computer breaks down, you will probably experience a great deal of confusion and discomfort. The Volunteer Wheels power supply degenerated recently and destroyed our hard disk. It took three months of shipping computers from here to Los Angeles, while using various loaners, some of which were faulty themselves, before the problem was resolved. In the meantime, while we could still schedule rides, in order to compile our monthly statistics we had to count all our rides by hand.

Typically, systems that provide less than 100,000 trips a year need software that contains only their client's data and enables them to schedule rides (in other words, a daily listing of rides). The routing is done by hand. Very large specialized transit systems (not the norm in volunteer transportation) may choose to spend the tens of thousands of dollars required to purchase software that routes the daily trips as well.

If you need to computerize to manage your information, you probably will need at least two terminals. There are two ways to do this:

1. Buy software that networks (more than one terminal accessing the same data base).
2. Do your scheduling on one terminal, link it with a cable to another terminal and then shift all the data to the other terminal two or three times a day to keep it updated.

A skilled programmer can set up either option. Volunteer Wheels chose the second option, linking two terminals with a cable. It works quite well and is simpler and less expensive than networking.

Whether or not you schedule with computers, remember, the entire purpose of scheduling and dispatching is to support the driver in delivering the right person to the right place at the right time. Design whatever system you need to accomplish that purpose and modify it as your needs change.

A final word on getting started. Before you deliver your first ride, devise an adequate system for keeping track of your rides. It will be important for you to know who you took, where you took them, and how many of them you took.

Your funding sources may require additional information. Even if you have no reporting requirements, keeping track of your rides is an important management tool to audit your activities and your progress.

Also, take a photo of your first ride. Down the road it will bring back fond memories. You'll be glad you did!

These are some of the essential things to consider when starting a volunteer transportation program. To succeed, the program manager must acquire a thorough knowledge of volunteer recruitment, volunteer management, and risk management as well.

When just getting started one needn't have mastered all of the esoteric in's and out's of recruitment and management. As the program succeeds and grows, so will the questions and challenges. Some or all of the information in the remaining chapters of this book, representing many years of trial and error, will become quite useful in sustaining success and expanding upon it.

Safety First: Insurance and Risk Management

Risk, the possibility of loss or injury, is part of transportation. You never eliminate risk. You manage risk, as best you can.

David Burton (president of Burton and Associates, a paratransit consulting firm) described risk management in the December '88 issue of the Community Transportation Reporter as follows:

Transit managers often find the term "risk management" intimidating. The process, however, should simply be viewed as another way of examining available data and system resources.

In its publication "Public Transit Risk Management," the Urban Mass Transportation Administration (UMTA) has described risk management as the identification, measurement and analysis of risk; the elimination or reduction of hazards; the assumption or insurance of the risk; and the establishment of a loss control program.

A risk manager is anyone managing a transit operation. Virtually no aspect of transit operations is unaffected by the risk management process. Unfortunately, no other area of transit management is as fragmented as risk management.

Effective risk management is supported by specific policies and begins with the collection, analysis and dissemination of good information.

Risk management is divided into seven categories:

1. Philosophy.
2. Driver Training.
3. Vehicle Maintenance.
4. Driver Screening.
5. Driver Licensing.
6. Passenger Responsibility.
7. Insurance.

Philosophy

Your maxim must be: Safety First. Making safety your number one priority establishes the basis for effective risk management. It sets the goal to live by. It makes daily problem solving easier because priorities are not confused when a fast decision must be made. Most importantly, making safety the number one priority places the well-being of passengers ahead of daily trip counts or other performance indicators.

Driver Training

Train your volunteer drivers well. Even if you experience high turnover, you must still train each new volunteer carefully and consistently. Insurance companies will require that volunteer drivers follow the same training and risk management procedures as paid drivers.

Make certain your volunteers know how to safely operate whatever vehicle they will drive. Provide training in first aid and CPR. Insist that seatbelts be used at all times and that safety seats are available for small children.

Give your volunteers a handbook that states your policies and expectations clearly. Many

programs give their volunteers a job description as well. Introduce them to the office staff and perhaps assign another volunteer as a "buddy" on their first day of driving. This helps them feel welcome—a part of the team.

Offering defensive driver training is essential to a good risk management plan. Such courses may be available from your state's Department of Transportation or your insurance company. Custom design a training for lift operation, wheelchair tiedowns, radio procedures, and so forth. Provide this training hands-on by an experienced, trusted driver. Emphasize the preventability of crashes.

With respect to preventability, The American Red Cross recently published a report entitled "Guide to Comprehensive Community Occupant Protection Programs." In it they state:

- Motor vehicle crashes are the fourth leading cause of death and crippling injuries this country faces today. They fall into the same class as heart disease, cancer, stroke, and AIDS. Car crashes kill ten times as many children as all the diseases they are immunized against. The common theme among all of these is preventability.
- In discussing the concept of injury prevention and control as a programmatic intervention, it is important to understand the confused use of the term "accident." According to Webster, "accident" means literally, "an event occurring by chance or arising from unknown causes." Yet, we routinely apply this term to events which are fully explainable and whose causes are known with great certainty.
- Consider the term "accident" as it applies to automobile crashes. Although we often refer to crashes as "accidents," such events are predictable, given certain information, and most are preventable. For example, if a person consumes a certain amount of alcohol, and continues to drive an automobile, a crash

becomes a predictable event. The action dictates the probability of such an event. Similarly, if someone enters a motor vehicle and does not use a safety belt, that individual has taken an action designed to increase the probability of serious injury in the event of a crash.

By applying the term "accident" to such actions and events, the cause and effect relationship is dismissed, thereby eliminating the need to do anything about the situation.

When individuals acknowledge the existence of prevention technology, then they acknowledge their ability and responsibility to solve such problems.

Vehicle Maintenance

If you have volunteers who drive their own cars, you rely on them to maintain their cars properly. (However, you may wish to safety inspect their cars periodically after their initial road test.) Vehicles your agency owns or leases are your responsibility. Regular service should be performed every three to five thousand miles. It is important to use competent mechanics who emphasize preventive maintenance. It is equally important for drivers to listen for the subtle groans which presage mechanical failures, and to report any suspected malfunction to the program coordinator.

Nipping mechanical problems in the bud saves you money. Drivers should fill out a vehicle maintenance check list each time they drive (See sample in Appendix). It must be carefully read by the risk manager. This check list covers the basics such as water and oil. It also provides an opportunity for drivers to jot down suspected mechanical problems, knowing their comments will be read and heeded. This is an essential risk management tool for maintaining a healthy fleet. It is an important volunteer management tool as well. If the drivers know their observations are respected and their equipment is being maintained safely they will have much greater loyalty and appreciation for the program.

Those interested in more detailed information about van maintenance are advised to request a copy of the Maintenance Manager's Manual for Small Transit Agencies. It was prepared for the Ohio Department of Transportation by ATE Management in Cincinnati, Ohio. Single copies of this report are available to support state and local officials at no charge. Send a self-addressed mailing label to the Technology Sharing Program (DRT-1), U.S. Dept. of Transportation, 400 Seventh St. S.W., Washington, DC 20590. Please note the report's title and document number (DOT-T-88-08) when ordering.

Screening Drivers

Good driver screening makes good sense. Any program that is casual about driver screening is playing Russian Roulette. The old adage, "an ounce of prevention is worth a pound of cure," applies here. If you have an unfortunate accident and your records show a casual attitude toward driver screening, it can put your agency in a very unfavorable light.

Specialized transit drivers must have good driving records. Standards will vary from agency to agency, but a good rule of thumb is: no drunken driving or reckless driving convictions in the last five years and no more than two or three moving violations and at-fault accidents in the past three years. Some agencies allow no more than two moving violations and one at-fault accident. Some are more lenient; some much more strict. This is a matter for your Board of Directors to decide, unless your insurance company has established minimum guidelines you find acceptable.

In every case, procure the driver's motor vehicle record from your state department of motor vehicles before you allow a new driver to participate in your program. You may also wish to create a simple road test to ascertain basic driving skills.

In California a driver can purchase a copy of their current motor vehicle record (MVR) for one dollar at the Department of Motor Vehicles (DMV). Since lines at DMV offices can rival food lines in Moscow, prospective volunteers often gasp when asked to go there. Consequently, Volunteer Wheels chooses to pay a fee to a

company who issues MVR's directly to our office.

Volunteer Wheels monitors driving records every two years for volunteers driving their own cars. We also subscribe to an incident by incident DMV pull-notice program for those who drive our vehicles. For a fee, the DMV notifies us whenever a van driver has a ticket or accident.

Because we want to be assured that every volunteer driving their own car has insurance, we make a xerox copy of their insurance policy cover page, which includes the limits they carry and their annual renewal date.

Licensing Drivers

With respect to special licensure, every organization must comply with state law. In California, Class B licenses are required of drivers of vehicles which are configured to transport ten or more passengers (not counting the driver). Some agencies have vans that carry fewer than 10 passengers and so their volunteers do not need a special license.

Volunteers driving their own cars for a volunteer transportation program require no special license in California.

Passenger Responsibility

Passengers play a key role in risk management. They must be willing to wear seat belts for the entire ride. They must not stand up before the vehicle comes to a complete stop, and they must not be an undue distraction to the drivers.

Passengers have other responsibilities which they should know about before they ride. A good way to inform them is to create a list of passenger responsibilities which they can read.

High risk passengers may be asked to sign a release-from-liability form, should unusual difficulties arise specific to the individual's medical condition.

Insurance

To insure means to make certain by taking necessary measures and precautions. Insurance companies actually don't insure. They *underwrite*. They assume a certain amount of your financial risk for a fee. Finding a company to underwrite your agency against catastrophic loss is an important element of risk management.

Typically, agencies also look to insurance to pay for stolen stereos, broken windshields, and fender benders. By and large it doesn't make good financial sense to insure against inexpensive loss or damage. On the average, much more will be paid to insurance companies over the years than is ever paid back for petty claims. Therefore, high deductibles with lower premiums, combined with effective risk management, is the best plan. The agency insures itself for petty losses and turns to the underwriter only when faced with a major loss.

Choosing an insurance broker to help you find an appropriate underwriter can be exasperating or rewarding depending on the condition of the private insurance market. In a so-called soft market, insurance is readily available at competitive prices. In a hard market, you may find yourself shut out, unable to purchase insurance at any price.

Over the years, the insurance industry has gyrated between soft and hard markets, like a person with an eating disorder who alternately starves and binges. We all suffer because of this chronic instability. Sometimes rates go up, sometimes down, but the long-term net effect is ever higher premiums coupled with stricter underwriting requirements.

To be fair to the insurance industry, the spiraling cost of vehicle insurance is not all their fault. In my opinion, this is a society-wide problem caused by many factors including, but not limited to, poor management policies within the industry. Exorbitant attorney's fees and jury awards, theft, ineffective risk management, and questionable insurance claims fan the flames of rising insurance costs.

If we are to solve this problem, our whole society must participate. Placing the blame on one party alone is unfair and unproductive. We must reassess our ethics, from government to industry to the family, making a collective decision to promote fairness and honesty at the expense of selfish profiteering.

Prior to 1985 when volunteer transportation was discussed, recruitment was always the hot topic. The insurance crisis of 1985 changed that. Now insurance is on everyone's mind. Whenever volunteer transportation comes up, the first question is: "How do you get insurance coverage for volunteers?"

Actually, little changed in the '80's other than the astronomical price escalation and tightening of availability which affected everyone.

The insurance industry has never been greatly concerned with differentiating between paid and non-paid drivers. By and large they still aren't, as long as all drivers have clean driving records and follow professional risk management procedures.

Unless there are poor loss-histories or high numbers of moving violations and at-fault accidents, volunteers are as insurable as paid drivers. If your program has had difficulty getting insurance because you use volunteers, shop around. Chances are you will find a company to underwrite your program at a fair market price. Alternatively, you may wish to band together with other providers to form a statewide self-insurance pool, which has been done successfully in Wisconsin, Illinois, and California.

Volunteer Wheels helped establish the pool in California with a task force composed of members of our statewide association. This pool is called the Paratransit Insurance Corporation. It began providing coverage to nearly one hundred specialized transit agencies July 1, 1988. (The address and phone number of the Paratransit Insurance Corporation is included in the Appendix.)

For years we in California had been led to believe that specialized transit is a "high risk" industry. This was evidenced by the high premiums we were paying insurance companies.

One of our task force's first steps was to conduct an independent study of the actual loss histories of specialized transit agencies in California. We discovered that, historically, specialized transit has been a "good" financial risk! Encouraged by this knowledge we proceeded with confidence to form the pool.

The agencies that joined the pool have agreed to continue to pay strict attention to safety, and to improve their risk management procedures whenever possible. Because of this, the Paratransit Insurance Corporation ought to be able to provide stable insurance to its members at decent rates for years to come, even in the event of another insurance crisis. Indeed, the first full year of coverage was a financial success.

While insurance companies don't often differentiate between volunteers and paid personnel, they do routinely refuse to insure drivers under 25 and over 65 years of age. In the past, Volunteer Wheels has had to pay a \$5,000 surcharge just to retain older drivers, regardless of health, emotional stability, references, driving records, or any other pertinent factual data.

Age restrictions may not have a major impact on operations with paid drivers. However, age restrictions are a serious problem for volunteer transportation because we rely so heavily on retired drivers. The industry-wide concern about older drivers is especially galling because there is factual data to refute the myth that drivers over 65 represent a significantly higher risk than middle-aged drivers.

Recently published research by the Transportation Research Board, National Research Center, reports that "most older drivers have good driving records. Up through age 75, most older drivers appear to perform as well as middle-aged ones." They go on to say, "Because, for any individual, age is a poor predictor of performance, age alone *should not* be the basis for restricting or withholding driver's licenses." A major insurance company helped fund this study. As it becomes more widely read we hope to see positive changes in the insurance industry's attitude toward older drivers.

On the other hand, it is not correct to suggest that age is never a safety factor or should be blindly overlooked. In fact, the research clearly indicates that drivers over 75 should be monitored carefully. However, undue emphasis should not be placed on chronological age. "Functional age" is the key factor. Functional age judges an individual's health, motor vehicle record, and other performance measures instead of the sum of birthdays.

If you begin to doubt an older driver's road safety, examine the evidence carefully. Don't deny or ignore, but don't jump to hasty conclusions either. Document all pertinent facts. If necessary, audit a driver's performance by contacting passengers. Let the clients know it is a routine audit so that you don't raise alarm.

If you do conclude that a volunteer is no longer functionally capable of driving safely,

you must find a way to inform him. This is difficult, especially if volunteering is a central activity in his life. It is an understatement to say that tact is in order. It goes beyond tact, especially since you have probably developed a close personal relationship with this individual. Be gentle. Let the volunteer know you are concerned about his safety as well as the passenger's. Explain the substantial amount of liability involved in a program like this. Explore other volunteer opportunities together. Do what you can to soften the blow, but keep to your decision if it is well-founded.

Dealing with functional age and road safety is an on-going concern whether or not volunteers drive their cars or your vans. If they are driving their own cars it is important for your agency to provide excess insurance that acts as a rider to the volunteer's primary coverage. Typically this is an additional one million dollars of liability coverage. It is usually very inexpensive to add this "non-owned auto" coverage as an addendum on the agency's general liability policy. In California this low-cost insurance can be purchased from the Volunteer Insurance Plan. (See Appendix for address and phone number.)

Volunteers driving their own cars will often ask if this activity will cause their insurance premium to rise. In most states, the standard practice of the insurance industry is to permit volunteer driving (with no premium surcharge), as long as the volunteer is not driving on a "for hire" basis. For hire means making a profit—a taxi company, for example. Receiving mileage reimbursement is *not* considered making a profit because mileage reimbursement only covers actual auto expenses. Likewise, accepting fares or donations and turning them over to a non-profit agency does *not* constitute for-hire.

If the insurance industry in your state does not allow volunteer driving, the question ought to be asked "How does this differ from taking a neighbor to the doctor?" If they point to fares or mileage reimbursement, question their definition of "for hire." If their position is intractable, go to your state legislators. Ask your lawmakers to create a workable definition of volunteer transportation by which the insurance industry must abide.

Occasionally a prospective volunteer will contact their insurance agent to see if driving for Volunteer Wheels will impact their coverage. Typically the agent will have never answered this question before. They will therefore take the conservative stance and tell the volunteer not to drive for fear of risking higher premiums. This is wrong advice based on inaccurate assumptions about the nature of volunteer driving. The driver, however, fearing the loss of his vehicle insurance at worst or higher premiums at best, will call us and withdraw his offer to volunteer.

It generally takes one to two weeks to straighten everyone out. Typically the manager or owner must be reached. Eventually, someone in authority who understands the question gives the right answer and the volunteer is assured that he or she can drive for Volunteer Wheels. This is an exercise in patience. Our patience is tried in this manner two or three times each year, always with the same positive outcome, fortunately.

Conclusion

Insurance and risk management are not glamorous, attractive topics. Most of us in this business have had to learn more about insurance and risk management than we ever wanted to. Nevertheless, these are fundamental issues that impact the overall health of our programs. These concerns can neither be avoided nor tossed lightly aside.

Insuring that your program has taken reasonable precautions against risk is the manager's first priority. However much you may want to blaze innovative trails, you will find no time for creativity if you're putting out fires day in and day out for lack of sufficient risk management.

Recruiting Volunteer Drivers

"How do you recruit volunteer drivers?" is frequently asked by people curious about starting a volunteer transportation program. The implication is they *would* start a service if they felt confident somehow in their abilities to recruit volunteers. Successful operators ask the same question from time to time when their tried and true recruitment methods no longer work.

The question of how to recruit volunteer *schedulers* and *dispatchers* is not addressed herein because they are a more "typical" volunteer. There are many books on volunteer recruitment that will serve well. For a comprehensive list of books and materials on volunteerism, contact Heritage Arts Publishing, 1807 Prairie Ave., Downers Grove, IL. 60515. Or write to VOLUNTEER - The National Center 1111 N. 19th St. Suite 500, Arlington, VA 22209. Request their "Volunteer Readership" catalog. It is described as "a resource to help volunteer managers and leaders do their jobs better."

Recruiting volunteer drivers is commonly accepted as one of the more difficult recruitment tasks. This is because the volunteer is asked to operate a vehicle, which raises issues of personal safety and liability. Driver recruitment therefore requires special knowledge and expertise unique to volunteer transportation. How to recruit volunteer drivers is described in depth in this chapter.

While people of all ages and walks of life enjoy volunteer driving, the most common volunteer driver is a retired man. Retired military men seem particularly well-suited to this activity. In fact, if you have a military base in your town, with an ample number of retired military,

you are likely to succeed with volunteer recruitment.

However, stating that retired men are the most likely volunteer is a generality with numerous exceptions. For example, the Sonoma County Unit of the American Cancer Society recruits mostly women. Recently Volunteer Wheels has been attracting larger numbers of young mothers who sometimes take their infants with them when they drive. So don't rule out any likely segment of your population when recruiting volunteers.

Since 1975 Volunteer Wheels has had over 600 different volunteer drivers come in and out our door. Currently we have over 100 active volunteer drivers. Our normal attrition requires us to attract a minimum of 30 - 40 new volunteers a year. Every program using volunteer drivers has an ongoing need for new volunteers, differing only in degree of need.

Let's look first at what motivates a volunteer. Altruism usually comes to mind...but altruism is only part of the story, as Dr. Thomas Hood and Linda Geiss in *The Volunteer Transportation Program* point out:

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 motivation 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 experience, to meet new people, to feel useful and to reduce loneliness and isolation.

Multiple motives create many varied opportunities for attracting volunteers. Understanding these motivations is the key to successful volunteer recruitment.

If what motivates a particular volunteer driver were broken down by percentages of desires and needs it might look something like this:

- 20% altruism, desire to improve society
- 15% desire to be productive
- 10% desire to assuage guilt, make points with God
- 20% desire to socialize
- 15% desire to get out of the house
- 10% desire for enhanced self-worth
- 25% desire to *enjoy oneself, to feel good*

Of these motivators, one of the most important is the desire to enjoy oneself, to feel good. While every volunteer will have different motivations in differing degrees, nearly every one will expect to derive some enjoyment from the experience.

People are eager for well-being. They want to enjoy their activities, especially their elective ones. Volunteer transportation can help satisfy that desire.

Every manager interviewed claimed their drivers derived great pleasure from driving. This is underscored by the remarkable number of years many have served. At Volunteer Wheels,

for example, some drivers have been with the program since its inception in 1975. Mile High Red Cross has volunteers with 20 and 30 years of tenure! Pat Loose of Mile High Chapter, said, "Most if not all of our volunteers would give a written affidavit that they get more than they give."

The following true experience of a Volunteer Wheels driver amply demonstrates the good feelings associated with volunteer driving...

She was a small quiet senior citizen among others with a pleasant face, waiting patiently for her next adventure, a ride to the rather plain sterile, dull residential care facility she now calls home. When I called her name she smiled and came forward trustingly like a child. I opened the car door and she entered with a graceful poise, thanking me for my assistance. After a quiet but pleasant drive, we arrived at her residence. Her eyes brightened. I could tell she saw it with different eyes. To her, this wasn't a dull, drab facility; it was her palace.

As I helped her out of the car she gave me the most beautiful smile. Then taking my hand she kissed it in the most innocent and giving expression possible. The dignity of her heartfelt thank you touched me deeply. It left me speechless and humbled.

I always end each day of volunteering feeling accomplished and satisfied that I have helped needy and appreciative neighbors. My own problems seem less serious and my overall well-being is always much improved. Never more than after this day. That kiss will remain with me always as a reminder of how we touch lives with simple attention and kindness and how much it is appreciated.

The idea of feeling good even extends to physical well being. An article entitled "Helpers High" by Allan Luks, Executive Director of the Institute for the Advancement of Health in New York City, appeared in the October 1988 issue of *Psychology Today*. Mr. Luks reported:

- People who exercise vigorously often describe feeling high during a workout—and (feel) a sense of calmness and freedom from stress afterward. New evidence reveals that these same emotional and physical changes can be produced with activity requiring much less exertion—(that of) helping others.
- An analysis of the experiences of more than 1,700 women who were involved in regularly helping others highlights these surprising effects. In many cases, this “helper’s calm” was linked to relief from stress-related disorders such as headaches, voice loss, and even pain accompanying lupus and multiple sclerosis. The increased strength and high may result from the release of endorphins, the body’s natural pain-reducing chemicals.
- Following the helping, many of the women reported a greater calmness and an enhanced self-worth. One elderly woman wrote that she found doing something nice for someone actually snapped her out of periods of depression. Another reported more self-esteem after volunteer work.

Because volunteer driving is so satisfying, volunteer recruitment can be quite effortless, especially in small communities where the message is easy to carry by word-of-mouth.

The reader might be surprised to hear that recruiting drivers can be easy. Of the programs interviewed, Sonoma Care-A-Van, the Indiana services, and the DeKalb Volunteer Center are particularly successful with volunteer recruitment. Not only are their volunteers relatively easy to recruit, they tend to drive for many, many years once recruited. Because these volunteers can honestly and enthusiastically communicate their enjoyment to their friends and neighbors in their small towns, word-of-mouth is an overwhelmingly successful recruitment tool for these programs.

For many reasons, volunteer recruitment is more challenging in heavily populated areas. Not only are people’s lives more hectic, they must be willing to fight congested traffic in

harried urban environments. These factors tend to decrease one’s enjoyment of volunteer driving. Therefore, survival for urban programs like Volunteer Wheels, Silver Key Senior Services, and Mile High Red Cross depends upon a diversified year-round recruitment plan. Word-of-mouth is still an important tool, but there must be many other effective tools as well.

Programs involved with year-round recruiting find that no one recruitment effort ever results in significant numbers of new volunteers. These programs employ a variety of techniques with the expectation of receiving a slow trickle of drivers every month from the cumulative effort.

In the words of Mikki Kraushaar, “No one recruitment tool will bring overwhelming results. So consistency is the key. Never let up. Regardless of the opportunity, strike at it!” After she said that she paused and quietly said, “You never know when you entertain angels unaware.”

MARKETING:

The Key to Successful Recruitment

Uncovering all the available recruitment opportunities and taking best advantage of them is the central theme in volunteer recruitment. The counterpart to volunteer recruitment in the private sector is called: *Marketing*.

Human service types (like the author) might let out a sanctimonious gasp if they have never heard this comparison before. It is, nevertheless, irrefutable. *Effective marketing is the key to successful volunteer recruitment.* You must vigorously communicate a message that causes people to volunteer or you will go out of business.

Those unfamiliar with marketing need not despair. There are a variety of time-tested marketing techniques which can be learned and applied to your specific environment. Obviously one doesn’t go about selling volunteerism like beer. Big time corporate advertising is usually impractical and inappropriate for volunteer recruitment. We need to think small to be effective. Think grassroots--think real people.

Jay Conrad Levinson, author and marketer extraordinaire, calls this “guerilla marketing.”

In a book by the same title he defines guerrilla marketing as follows:

Marketing is everything you do to promote your business, from the moment you conceive of it to the point at which customers buy your product or service and begin to patronize your business on a regular basis.

Likewise, a working definition of volunteer recruitment might be:

Volunteer recruitment is everything you do to promote your service, from the moment you conceive of it to the point at which people willingly decide to volunteer.

These definitions are virtually identical. Nevertheless, mention marketing and people recoil. Sue Vineyard underscores this in *Marketing Magic for Volunteer Programs*:

Marketing...by my count that word consists of 9 letters from the English alphabet, yet as I travel extensively, training for non-profit groups, I find that many people are convinced it's a four-letter word written in some mystical language.

She goes on to say about marketing and recruiting:

When (an) organization identifies a need it has for volunteers, it figures out what value it might offer those volunteers in exchange for their efforts. The true 'magic of marketing' comes when all parties involved in an exchange relationship are convinced they have received the greatest value.

We who recruit volunteer drivers market an excellent product. We provide a service which gives enjoyment to volunteer and passenger alike while accomplishing something beneficial in the community at large. A perfect sale in the private sector would be one where no one loses—a fair exchange of value—a win/win. With volunteer recruitment, win/win is the norm. Actually the one who gives the most, in this case the volunteer, ends up getting the most in the sense of personal satisfaction and well being.

Karen Trzeciak said it well: "Marketing isn't bad. I look at the private sector with ad agencies trying to convince people that one laundry soap is better than another when there's really no difference. We don't have that task. All we have to do is tell the truth!"

Most programs need some sort of marketing strategy. This strategy must be well thought out. To understand marketing principles in detail, read Sue Vineyard's book on marketing magic and Jay Conrad Levinson's book on *guerrilla marketing*. Interestingly, *Guerrilla Marketing* never mentions the word volunteer. It addresses itself to developing a market strategy for small businesses such as home typing services. It nevertheless contains the right stuff for successful recruitment of volunteer drivers. Purchase it. Read it carefully. Follow the guidelines. They flat out work!

For many years Volunteer Wheels relied too heavily on one recruitment technique—press releases in our local newspaper. Our marketing sinew was weakened by our reliance on an abundant response to each semi-annual press release. One day we discovered that our paper had lost local ownership. The new editor changed their long-held policy about publishing press releases for non-profits, making it more difficult to get press releases to advertise our need for volunteers. Lack of media exposure began to wreak havoc with our recruitment efforts.

It was small consolation to learn that we weren't suffering alone. Many other human service agencies were similarly affected. We all began looking for other ways to get our message out. Understandably the competition was fierce from all these volunteer-hungry agencies.

For two years we struggled. Because we have a voracious appetite for new volunteers, each month worsened our predicament.

Fortunately, three things happened in quick sequence:

1. We discovered *Guerrilla Marketing and Marketing Magic for Volunteer Programs* which explained how to create a marketing strategy.
2. We formed a committee of interested Board members to compose an effective marketing plan.

3. The policies at the local paper reverted back to what they were earlier and we began to once again enjoy an excellent relationship with the local press.

Our recruitment efforts again began to meet with success.

En route, we learned two essential lessons:

1. Have a marketing plan which doesn't concentrate your message in one medium.
2. Devise recruitment methods that advertise the program year-round to create a small but steady influx of volunteers and keep the program visible to the public at all times.

To accomplish these goals you need a marketing plan. Levinson explains how to create a workable and useful marketing plan which clarifies your market and leads you to the right marketing tools and techniques.

At the core of a marketing plan are five all-important questions:

1. What is your purpose?
2. Who is your audience?
3. What value do you offer?
4. What are your tools?
5. What is the cost?

The answers to these questions will define your market strategy. Soon thereafter you will be able to begin to implement the tools and techniques you have decided are the most likely to help you achieve your goals.

Some techniques will fail and some will succeed. With a market strategy, you can logically build on your successes and learn from your failures.

With respect to failure in marketing, you soon learn that failure is not failure. Rather, it is a necessary step toward success. No recruitment effort is ever in vain. Redefining failure in a positive light virtually assures eventual success.

Levinson insists that marketing is a creative process. Not only must we be creative when

designing our marketing tools, we must be ever alert to new circumstances that could influence our service. Populations shift, grow older, less wealthy and more wealthy. Traffic congestion may get better or worse. Government and industry can encourage or discourage public attitudes toward volunteering, and so on.

How do we maintain a creative outlook to deal effectively with all these changes when they happen?

Marlene Wilson, author and consultant on volunteerism says, "an uncreative mind can spot the wrong answers; it takes a creative mind to spot the wrong questions." Learning to ask the right questions is the essence of the creative process. This is true of all creativity, whether in art, science, or business.

Recognizing that many people feel inadequate or underdeveloped when it comes to invention or originality, Levinson spends time "removing the mystique from the creative process." He says:

One must think backwards. Start by picturing the mind of the customer (volunteer) at the moment that customer makes a decision to purchase (agrees to drive). What led to that decision? What were the thought processes? What made them take place? What were the customer's buttons and what did you do to push them? Thinking backwards takes you to the needs and desires that are crucial to motivation.

Thinking backwards puts you in the mind of the prospective volunteer. It teaches you to ask the right questions. Doing so allows you to imagine what motivates a person to action. Designing the right tool to match the motivation becomes relatively obvious. It follows logically. Use the list of motivations from earlier in this chapter to stimulate your creativity. Visualize yourself retired from gainful employment. Now ask yourself what it would take to convince you that your needs and desires would be met by volunteer driving.

We did this exercise at Volunteer Wheels and learned to think backwards. What resulted was a successful marketing plan. Even though recruitment remains an ongoing challenge, a

good recruitment strategy has made all the difference. Recruitment is infinitely easier and more rewarding because we know how to go about it systematically with a realistic expectation of success.

In summary, the guidelines for a good marketing strategy are:

1. **Diversity**—come from many directions with a diverse marketing plan.
2. **Consistency**—recruit in some way every day.
3. **Visibility**—stay extremely visible; be the squeaky wheel.
4. **Creativity**—always keep an eye out for new, creative ways to get the message across to the public.
5. **Resiliency**—view failure as a step toward success.

Those who translate diversity, consistency, visibility, creativity, and resiliency as: work, work, work, and more work should take heart. It's not as hard as it sounds.

Admittedly, developing the initial marketing plan can be a gut-wrenching creative struggle. But once you have devised your strategy, you just have to stay tuned to the changes in your community which affect your plan. Do so with a willingness to try out new ideas and fresh approaches.

Before we list various marketing tools and techniques that have worked in communities across America, it is important to describe how your office staff ought to communicate with prospective volunteers.

Everyone who answers your phones or greets people in your office has a critical role in successful recruitment. When a potential volunteer has made an effort to contact your office, he or she must receive nothing less than VIP treatment. If they leave a message, make sure the information is taken accurately and that their call is returned as quickly as possible. An immediate response tells them they are valued.

Perhaps you have enough volunteers at the moment. Treat all prospects with the same courtesy, regardless of your current need. If you don't have a place for them, suggest another

agency that may be able to put them to good use. The favor may one day be reciprocated by that agency.

Interviewing Prospective Volunteers

Only one person should interview a prospective volunteer. Interviewing is as important as it is difficult to do well. It is a special skill which needs to be developed to a professional polish.

An interviewer feels the tug of conflicting goals: wanting to make the person feel welcome and honored, while critically examining the applicant to determine whether or not he/she is appropriate for the program.

If there are nagging questions, check references; take the prospective volunteer out on a long road test; or simply suggest a second interview. Do something, anything, to give yourself time to reflect or gather more information. But don't appear apprehensive because your questions eventually may be satisfactorily answered. Most volunteers understand a reasonable amount of caution if they feel they are being treated in a fair and routine manner.

If your questions finally cannot be resolved satisfactorily, it is better to take the tough road. Don't give in to the temptation to lower your standards against your better judgement just because you need more volunteers. If your marketing strategy is well designed, you will attract other volunteers. Be somewhat choosy. In the long run you'll bless the day you decided to take that approach.

You will need an application of some sort to keep the volunteer's personal information in writing. Keep your forms simple so the volunteers don't drown in a sea of paperwork as soon as they step in the door. Some retirees have a special aversion to paperwork, believing their station in life has earned them relief from such worldly burdens. Remember to KISS: Keep It Simple Sir! Volunteer Wheels asks for a brief statement of medical condition and a 5 year history of moving violations and at-fault accidents. We take their name and address and phone number and a few other particulars and leave it at that. (See application in Appendix.)

Finally, the volunteer recruiter must keep track of how many new volunteers are recruited each month. Note where they heard about your

agency and what encouraged them to call. This is an essential contribution to your on-going marketing strategy. It tells you what is working and what isn't.

What follows is a list of marketing tools and techniques collected from programs across America. Don't start with these tools; start with your market strategy. When you get to the place where your recruitment techniques must be decided upon, these are some excellent ideas and suggestions. Some will work well in your community, some won't. You'll only know by trying.

Remember, no marketing effort is ever wasted. You never know what it takes, or how many times someone must hear your message before they respond. All you can do is put it out there consistently, honestly, and skillfully.

The Tool Box

1. Word-of-mouth (volunteers recruiting their friends, relatives and associates) is generally considered the most effective tool. Every volunteer is a public relations representative for your agency. It must be emphasized that word-of-mouth works best in small closely-knit communities and less effectively in urban areas where people are less well-connected with their neighbors. Nevertheless, word-of-mouth is always an effective tool which you must learn to use to your advantage.

The DeKalb Volunteer Center has managed to make volunteer driving a symbol of prestige in their community. This is a most enviable position to achieve because then prospective volunteers will seek you out!

2. Your vehicles are your next best tool. Paint:

"We Need Volunteer Drivers.

How About You? Call 573-3377"

on the back of the vans so the message jumps right out at people waiting at a green light. Don't be subtle. Most of us are overwhelmed with information hour by hour. We don't have time for subtle-

ties. Humor works. But if you can't be genuinely funny, don't try. Be bold instead.

Use magnetic signs for volunteers driving their own cars. Not only is this good advertising, it identifies the car to a cautious passenger unfamiliar with a new volunteer.

Cars and vans are travelling billboards. Make good use of this fact and you'll be recruiting aggressively every single day!

3. Convince your local Volunteer Center how important you are. Tell them no other social service program will function well if their clients don't have transportation. This isn't blarney. It's true. If you can present your case directly to those who actually interview and refer volunteers themselves to agencies, so much the better.

4. Volunteer Wheels distributed 5,000 bookmarks through our local bookstore chain with a message that read

Give Someone A Real Lift.

While only one volunteer was recruited directly from the bookmarks, we feel it offered excellent countywide exposure. If we reprint these bookmarks, we'll use a more direct message:

We Need Volunteer Drivers.

Call Today.

5. A direct mail campaign, with a persuasive insert targeted to concentrations of retired middle and upper-middle class residents, can work wonders. Target your population carefully. Advertising agencies can be remarkably selective with mailing lists depending on how much you are willing to pay for their service.
6. Speak at clubs, mobile home parks, town meetings, local chapters of AARP, anywhere that likely volunteers will listen. Don't tell them they'll have a good time, show them. Use slides and video when possible. Talk about ac-

tual volunteers—what they're doing and why. If at all possible, have one or more volunteers make the pitch, preferably to groups where they are known.

7. Sponsor a Ride-Along-Day: a time when prospective volunteers can try it out by riding along, perhaps with a friend. It allows them to see what it is like before making a commitment. This benefits the agency, as well. It's discouraging and expensive to train volunteers who quickly drop out because they didn't clearly understand what they were getting into.
8. Develop a ten minute video presentation that volunteers can lend to friends to pop in their VCR's and learn all about you. Be sure to "show" them what you do, don't just "tell" them.
9. Print business cards with your recruitment message and phone number on them that volunteers can hand out to likely prospects.
10. Print caps, t-shirts, and buttons with your name, logo and phone number on them. Some agencies provide coats or vests, like a uniform, for their drivers. This is great walking advertisement.
11. Press releases and public service announcements on radio should be issued regularly. If possible, include a photograph with your press releases. Volunteer Wheels has discovered that the Thanksgiving/Christmas holiday season is the best time to appeal to the public through press releases. Even though people are preoccupied with Christmas shopping and parties, this is the time of the year people think of making a contribution to their fellow man.
12. Convince your paper or local TV station to do feature articles on your program as often as possible. Take advantage of free copy in neighborhood papers and circulars. Get your local gas company to insert your

message with the monthly billing.

13. Get adopted by your local Chamber of Commerce Community Leadership class. The Santa Cruz Chapter of the American Red Cross did this and now they have eight high-powered local leaders recruiting and raising money for them.
14. Become part of the retirement portfolio at local businesses and corporations. Let retirees know in advance you are offering them a great opportunity for their retirement.
15. Paid ads in newspapers usually don't work as well as other tools. If you wish to try this, be certain you don't pay for it. People figure if you have enough money to buy ad space you don't need their free time. Have a local business sponsor the ads and be certain that their sponsorship is clearly indicated.
16. If you are an agency-based service that must recruit in outlying areas where your agency has little or no visible presence, recruit a willing volunteer coordinator who lives there to recruit for you. This person can schedule rides, as well.
17. Some agencies have had success recruiting volunteers at churches. The two best ways to do this are:
 - a. address the congregation on Sunday, and/or,
 - b. get your message in bold print in the Sunday bulletin.

Parishioners tend to read the Sunday bulletin cover to cover!

There are doubtless many other effective recruitment tools. Some you will discover and others you'll borrow. Use what works and keep moving. One tool may work for a while and then seemingly wear out. Who knows why. Stay flexible, attentive, interested, and creative. Recruitment is actually fun when you have a clue about what you're doing and can see tangible results.

Remember, if you're recruiting for an agency-based service in an urban area thick with competition, set your sights low or you'll spend a great deal of time doubting yourself. Recruiting drivers can be challenging. Any success is great success! Don't look over your shoulder at other programs. Just recruit steadily, day by day, taking advantage of every opportunity, and you'll succeed.

Working With Volunteers: The Art of Volunteer Management

To some extent, volunteer management is an unfortunate term. It doesn't really describe what happens day to day. It paints instead an inaccurate picture of a boss lording over the underlings--an "us" and "them" mentality. Paul Hawken, owner of Smith & Hawken, recently wrote a best seller entitled *Growing a Business*. In it he described what it's really like to manage people successfully:

I am amused but dismayed when someone talks about managing people. You don't ever manage people--you *work with* them. For your business to succeed, you must take exceedingly good care of your people. This is not a chore or a responsibility, it is the most rewarding aspect of being in business, yet it is the area in which most businesses, large and small, fail.

Working with volunteers is even more challenging than working with paid personnel. Volunteers re-decide to volunteer every day they come to work. Since there is no financial reward, they have to *want* to be there. Even if they've made a long term commitment, if they're not treated well they'll simply decide to go elsewhere. You, the manager, must see that they are welcomed, employed well, and appreciated. Volunteer management based on this philosophy will succeed. It is the essence of "working with...taking exceedingly good care of your people."

Working primarily with retired volunteers has its own set of challenges. There is a fundamental conflict between professional staff and many retired volunteers. Each has a different perspective on time. The typical retired volunteer driver usually has a surplus of time; the

professional has very little. Therefore the potential for misunderstanding is great.

While some retired volunteers have busy schedules and won't want to chit chat, you must carefully manage your time with those who want to amble through an hour or two with you. However much you might love to sit and kibitz all day, you know if you don't pay attention to the relentless details of your daily tasks all hell will break loose. So strike a good balance.

Sometimes the response of paid staff to these time demands is to become very matter-of-fact with all the drivers in order to protect their valuable work time. This is a mistake which may alienate the drivers. This mistake is compounded when a volunteer needs to convey critical information to someone but may be intimidated by stern faces in the office. The flow of communication from driver to scheduler and dispatcher will thereby be interrupted. Because this information flow is essential to your success, you cannot afford to intimidate your volunteers into tiptoeing around the office. The opposite reaction won't do either. No one can afford the luxury of playing all day when there is work to be done.

With this delicate issue, one must learn to walk the middle path. Be available as much as possible, but pay attention to the work at hand when necessary. If you structure your office staff so tightly that every person is dead busy 8 hours a day with essentials, your office won't have a warm, nurturing ambience. It won't be a fun place to be, and your volunteers may object. On the other hand, who has the money to hire a designated socialite? So strike a happy medium.

Ask each staff member to at least say hello when a volunteer arrives and to say thank you when they leave. Stress the importance of friendly interaction with the volunteers and create an atmosphere in the office that promotes this. A few kind words go a long way.

In addition, the Program Director or Coordinator must place handshaking, easy conversation, and verbal stroking of volunteers at the top of his/her priorities, not at the bottom. Everyone knows the Director is the highest paid staff person. A few minutes of his/her time is highly valued by the volunteers. It tells them they are important. In the currency of volunteerism, it's a good paycheck.

There's a give and take in working with volunteers. It's a two-step. You give, you receive, you receive, you give. It's a good dance, once you get the hang of it. Volunteers want to enjoy your company and be treated well. They'll give you all sorts of clues about how to do it if you're attentive. Develop genuine friendships. But be careful not to mass produce your affections. Treat each one as an individual. Talk baseball with Joe. Rap world politics with Rod. Tease Jim Crane about his name. Call him J.C. Some don't like to be teased. Some would quit if they weren't. Hug some. Be professionally distant with others. Melt when Luverne comes in and plants a big red lipstick mark on top of your bald head.

Operating a volunteer transportation program is an intensely human experience. You get very close to your volunteers. If they fall ill or die, you grieve. You feel the loss professionally as well as personally. This is a good kind of hurt. It makes you know you're alive in your job, not just repetitively slinging hamburgers or typing mindless memos.

Tala Stewart of the American Cancer Society reminded me of a favorite volunteer who passed away two years ago. He was the sort that would have driven five days a week if needed. She still hasn't gotten over his loss. Maybe she never will.

John Bunnell at Volunteer Wheels died of cancer recently and left a similar legacy. I sang "Stumblin' Heavenward" at his memorial service. His wife thanked me with a gift of a glass crystal. It hangs in my bedroom window. On

sunny days the dancing rainbows on my wall remind me of John. This is sweet sorrow.

You'll laugh a lot, too. Hear great stories. Eat many more chocolate chip and peanut butter cookies than you should. Suffer through vehicle breakdowns, not enough volunteers, too many volunteers, accidents, missed rides, and cancellations. Volunteer transportation stimulates the full range of human emotions.

The Volunteer Transportation Manager

A successful volunteer transportation manager must be a fairly mature and balanced soul who is:

- Sensitive,
- Multi-skilled,
- Detail oriented,
- Trustworthy,
- Dedicated,
- Trusting,
- Entrepreneurial,
- Able to laugh, and
- Creative.

It is a rare bird who has a full measure of each of these admirable qualities, but they all must be present to one degree or another in the management team. A coordinator who lacks one quality, say detail orientation, would do well to keep this in mind when hiring an assistant.

Sensitivity

Of these qualities, the most important is sensitivity to people. This implies a love of and appreciation for human nature. It suggests honesty, compassion, and integrity, with an ability to accept, forgive, and allow. A job this real, this personal, won't tolerate an emotional recluse. If you recoil when you're touched deeply, you will struggle. If you're receptive to life and can be with it moment to moment, volunteer transportation is a wonderful opportunity to grow and learn. The heart must be open and the mind attentive. Emotional immaturity and lazy logic won't cut it.

Responsiveness is an essential counterpart to sensitivity. While it is critically important to listen carefully, you must be able to respond decisively to real needs and concerns. Most volunteer drivers are retired, successful people who have weathered life's trials and come out on top. They can spot an emotional vacuum and an unresponsive management style with relative ease. Their loyalty must be earned. They will be less inclined to develop a close, personal relationship with someone they don't respect. Much of the program's success depends upon the trust the manager is able to build with the volunteers.

Multi-Skilled and Detail Oriented

Being multi-skilled and detail oriented go hand in hand. Volunteer transportation can be a blurry mosaic of engines, tires, computers, correspondence, insurance, graphs, grants, committees, budgets, addresses, phone numbers, and countless ever-changing trip schedules. The manager may write grants and change tires, handle delicate personnel issues and design routing systems. Being able and willing to learn to do many things is important. Paying attention to details is critical to success.

Trustworthy

The Board of Directors and the Executive Director must trust the transportation manager's judgement. There are so many important matters to pay attention to, from van maintenance to the proper screening of drivers, that the manager must be trusted to exercise good common sense, with the ability to take decisive action. An absence of these qualities ultimately could jeopardize passenger safety.

Dedicated

People in this business are dedicated, or they get out. People are dedicated because they believe that specialized transit is a life-giving, life-affirming service that, when done by volunteers, becomes something special indeed. Because one must approach this work as a "cause" rather than a "job," inherent in that outlook is the understanding that there will be unusual difficulties and stresses that require sacrifice, devotion, and dedication.

Trusting

Some people have more trust or faith in life than others, whether this be a spiritual faith or simple faith in life. People who don't trust can find volunteer transportation unbearably troublesome. There are too many unpredictable variables for "control" to work. You can't control it. You just have to let it be. Everyday you send volunteers on their way and trust their good judgement and common sense. Risks abound. Potential for failure is great. If you worry about it and take it personally and try to fix and control every outcome, you'll dig yourself an early grave with worry.

Letting go is a practice. When worried or frightened our instinctive reaction is to tighten. For example, when the airplane hits turbulence, our first reaction is to clutch the armrest. What good does that do? It just gives us white knuckles. It doesn't help the plane fly better.

Relaxing in the midst of turmoil, letting go when we instinctively want to control, giving up when we want to hold on, allowing when we want to analyze, forgiving when we want to blame must all be practiced, learned. Beyond enforcing healthy rules, regulations and policies, we must learn to accept. We must believe it will all work out for the best. It usually does, if we let it. When it doesn't, make the best of it and believe tomorrow will be better.

Interestingly, having enough volunteers involves letting go, as well. Clinging to them because you're afraid you won't have enough is a sure way to not have enough. Let them go when the time comes. Someone will come to replace the empty space. This is difficult, but it is the only way that works well.

Entrepreneurial

A volunteer transportation manager is an entrepreneur, not by the flat dictionary definition: "one who organizes, operates, and assumes the risk of a business venture," but in the sense of common usage of the word: "one who isn't afraid to take big risks." This does not mean that it is risky business running a volunteer transportation program...no more so than any other specialized transit service. It means that on top of the inherent physical and financial risks, you add reliance on voluntary public

commitment. You believe that you can operate your program by attracting enough responsible people who are willing to give freely of their time. This is quite a premise. It keeps you hopping. There is rarely a dull moment. One must stay alert, ready to respond to new recruitment and funding opportunities.

This is no easy, feet-up-on-the-desk job. As soon as all the pieces of the puzzle are in place, the puzzle changes. The difference between the non-profit entrepreneur and our counterpart in the private sector is that our goal or reward is the personal satisfaction of knowing that by our skill, dedication, faith, and enthusiasm we have helped people in need.

Enthusiasm is probably one of the greatest allies of the entrepreneur. With respect to enthusiasm, Ralph Waldo Emerson once said:

Enthusiasm is one of the most powerful engines of success. When you do a thing, do it with all your might. Put your whole soul into it. Stamp it with your own personality. Be active, be energetic, be enthusiastic and faithful, and you will accomplish your object. Nothing great was ever achieved without enthusiasm.

Able to Laugh

Humor is everywhere if you can see it. The human condition is quite comical. This is never more apparent than when giving people rides. If you can't laugh at the absurdities, the oddball stuff that happens everyday, the only other alternative is to explode. The energy has to go somewhere. Volunteer Wheels got an irate phone call the other day from a woman who couldn't understand why a volunteer couldn't give her a personal tour of the wine country. She had, after all, paid her taxes!

Creative

Finally, volunteer transportation is somewhat of an art form in that much of it is a creative process. It is participatory art, a play of immense proportions that we write, direct, and in which we play a part. The most important ingredient in creativity is the willingness to ask difficult questions and find honest answers. According to Willa Cather (1873-1947) "Artistic

growth is, more than it is anything else, a refining of the sense of truthfulness. The stupid believe that to be truthful is easy; only the artist, the great artist, knows how difficult it is."

If you are willing to be painfully honest with yourself, you can tell how well you are doing. Ask yourself how much laughter there is in the office. What is your rate of volunteer attrition and why do volunteers quit? How much love is expressed? How many smiles do you see? How many complaints do you get? How many cookies show up spontaneously?

Working with Volunteers

In volunteer transportation, the volunteers *are* the program. The Dickensian image of the silent, stamp-licking, unappreciated volunteer who is burdened with duties too boring for paid staff isn't found here. Your volunteers provide the product. They represent your program to the public. They make independent decisions daily affecting liability, efficiency, and quality. *You are the support team; the volunteers are the players.* You are there to serve them, not vice versa.

You support your volunteers in the following ways:

1. By communicating clearly. Use handbooks, newsletters, job descriptions, training sessions, memos and so forth to give your volunteers the information they need to do well. Please give them *accurate* information on their trip schedules.
2. Listen to and respect their input and opinions. They ought to know. After all, they are the people who are out on the road.
3. Be helpful and available when they have special needs.
4. Provide tools that work, are clean and safe. The most obvious example is a well-maintained vehicle.
5. Permit easy-going flexibility with their personal schedules. They'll stay for the long-haul if convinced you will respect the demands of their personal lives and won't lay on the guilt when they can't drive.

6. Recognize their efforts individually and collectively. Personalize this as much as possible. The time you take out of your daily schedule to thank volunteers shows you care enough to notice their gift. Mikki Kraushaar has heavy callouses on her fingers from writing thank you notes to her volunteers.

Volunteers do enjoy and appreciate potlucks, banquets, plaques, and certificates; but these are hollow symbols if genuine appreciation isn't expressed personally.

Karen Trzeciak feels that awards should not be used to motivate volunteers and should definitely not create a sense of competition. Especially do not give awards for mileage driven or number of trips completed. Everyone contributes a great deal. Recognition awards ought to be general in scope, or specific in non-competitive ways such as awards for each five years of service.

With respect to volunteer recognition events, there are many ways to plan these and they are an essential element of volunteer management. Sonoma Care-A-Van throws an elegant, pull-out-all the stops, catered bash once a year. Volunteer Wheels has a big, breezy, down-home potluck dinner with entertainment and lots of laughs. You can choose whatever works well with the personality of your group. Here are some ideas for volunteer recognition:

1. Choose a volunteer of the year.
2. Send thank you notes liberally.
3. Send birthday cards, Valentine cards, Christmas cards, etc.
4. Do individual profiles in your newsletters.
5. Print thank you notes from your clients in your newsletter.
6. Give awards and plaques for 5, 10, 15 years of service.

Volunteers don't drive for the recognition. Most shy away from it outwardly while inwardly appreciating the attention and the thanks. Silver Key Senior Services announces their sin-

cere appreciation for their volunteers by displaying a poster prominently in their office which reads:

you are	Very special
people,	Organizing
your	Lives
in	Unselfish
and	Neighborhood acts.
So let us	Thank you
for your kind	Efforts
for the	Elderly
who have	Received
your generous &	Sincere gifts.

Harriet Naylor in her book, *Volunteers Today-Finding, Training & Working with Them*, states:

The feeling of being in tune with the whole is of prime importance to a volunteer on the job.

She quotes the following summary on volunteer motivation by J. Donald Phillips, former President of Hillsdale College, Hillsdale, Michigan:

If you want my loyalty, interests and best efforts, remember that...

1. I need a *sense of belonging*, a feeling that I am honestly needed for my total self, not just for my hands, nor because I take orders well.
2. I need to have a sense of sharing in planning our objectives. My need will be satisfied only when I feel that my ideas have had a fair hearing.
3. I need to feel that the goals and objectives arrived at are within reach and that they make sense to me.
4. I need to feel that what I'm doing has real purpose or contributes to human-welfare--that its value extends even beyond my personal gain, or hours.
5. I need to share in making the rules by which, together, we shall live and work toward our goals.

6. I need to know in some clear detail just what is expected of me--not only my detailed task but where I have opportunity to make personal and final decisions.

7. I need to have some responsibilities that challenge, that are within range of my abilities and interest, and that contribute toward reaching my assigned goal, and that cover all goals.

8. I need to see that progress is being made toward the goals we have set.

9. I need to be kept informed. What I'm not up on, I may be down on. (Keeping me informed is one way to give me status as an individual.)

10. I need to have confidence in my superiors--confidence based upon assurance of consistent fair treatment, or recognition when it is due, and trust that loyalty will bring increased security.

Disgruntled Volunteers

A disgruntled volunteer is often the result of a communication failure. You can schedule a three or six month sit-down review to ask how they're doing and head off potential problems, or handle it informally. The important thing is to listen carefully to their hints, their body language, their thoughts and concerns and deal with them head-on as they arise. Don't sweep things under the carpet. By tomorrow it may be too late.

Sometimes a disgruntled volunteer is simply on a power or ego trip. Dealing with this is probably one of the greatest challenges a manager will face. The best policy is to be firm. Let them know who is boss, and let the chips fall where they may. You can't afford to lose the respect of your staff and volunteers.

Volunteer drivers can become upset by such things as unruly passengers, over-scheduling, under-scheduling, too much pressure to substitute on days off, and so on. But nothing raises a volunteer driver's ire more quickly than being asked to drive a passenger who they believe doesn't qualify for the service. Their

redhot thought goes something like this: "I'm taking time out of my life, setting aside my affairs, to go to this so and so's house to chauffeur him around town when he walks fine, is close to the bus, and his grown son is sitting around the house watching t.v."

If this happens too often, the volunteer will quit. At Volunteer Wheels we have seen volunteer drivers quit after one experience of that sort. Typically their reaction was knee-jerk. They didn't stop to wonder if they were misperceiving the situation. In one case, even after we investigated and clearly determined the client's eligibility, the volunteer was so upset we could not convince her to continue.

Doubtless there will always be social service fraud. It is literally impossible to thwart it entirely. What you can do is make a concerted effort--plainly visible to the volunteers--to control it.

Volunteer Wheels requires each passenger to fill out a written application (included in the Handbook in the Appendix) stating their need and physical condition. It must be accompanied by a physician's certificate. Other programs do something similar. The volunteers are aware of this procedure and are by and large satisfied that we are making a good faith effort to fend off those who would take advantage.

Saying Goodbye

It is always a sad day when a long-time, cherished volunteer leaves the program. They do so for many reasons. Sometimes it is health or age. Sometimes it is simply time to go. You hope to manage your program so well that when volunteers quit it isn't out of frustration or anger. Regardless, attrition is a fact of life in this business. Your annual rate of attrition defines the intensity of your recruitment efforts.

Because attrition is real, it must be planned for. It is best not to rely on each volunteer too heavily. Most programs ask for a 1/2 to 1 day a week commitment. Driving 2 or 3 days a week is discouraged as a way of minimizing burn-out. There is another reason as well. When two or three day-a-week volunteers leave suddenly, they leave a huge gap. Losing a 1/2 day a week volunteer has a much more gentle impact. The trade-off is you must have many more volunteers.

When a volunteer leaves, thank them for their contribution. Ask them to fill out an Exit Interview so you get honest feedback about their experience. The Appendix contains a good sample.

Firing a Volunteer

As has been repeatedly stressed, recruit and train well and you will minimize your headaches. If you do, you will rarely, if ever, have to dismiss a volunteer for inappropriate behavior. However, no one in this business is immune from the possibility of dismissing a volunteer. This is not a pleasant task. It is worth avoiding at all cost. But when it must be done, it must be done. Paul Hawken in *Growing a Business* (Pg. 213) says:

The firing of an employee has its roots in the medieval practice of ostracism. If a village in Europe or China wanted to censure and remove a member of society, the townspeople went to the offender's home and burned it to the ground, along with all the possessions inside. That's how they fired someone. It's unfortunate but apt that this term "firing" lives on to describe the way we "terminate" employment.

Firing is failure. Everybody is at fault. That's the simplest way to look at it. The best way to avoid firing people is to hire well in the first place. Hiring is one of the most critical activities of any business, and you should learn to do it well. It can make an enormous difference in your success. I estimate that one-half of all business problems originate with the perceptions, attitudes and practices of the owner. The other half of the problems are caused by faulty hiring.

Steve McCurley and Sue Vineyard suggest the following ten alternatives to firing a volunteer in their book *101 Ideas*:

1. Reconnoiter to find out what is really wrong.
2. Re-supervise the volunteer.
3. Re-assign the volunteer to a new staff person.

4. Re-assign the volunteer to a new job.
5. Re-train the volunteer to be able to do the job right.
6. Re-vitalize the volunteer by giving them a sabbatical.
7. Re-motivate the volunteer.
8. Rotate the volunteer to a new setting.
9. Refer the volunteer to another agency.
10. Retire the volunteer with honor.

When all else fails and you must fire a volunteer they suggest how to "fire a volunteer and live to tell about it":

1. Provide clear forewarning and notice to volunteers that they may be terminated:
 - a. have clear agency policies on termination.
 - b. make the policies reasonable and related to the work to be done.
 - c. include a policy on suspension.
 - d. tell volunteers about the policies in orientation and training session.
 - e. give volunteers a copy of the policies as part of their personnel manuals.
 - f. make the policies specific to each volunteer by providing them an updated, accurate, and measurable job description.
2. Conduct an investigation or determination before firing a volunteer.
 - a. have a fair and objective investigator determine if policies were actually violated.
 - b. never fire on the spot without conducting an investigation: use a suspension clause to allow time to examine the situation.
 - c. make sure you have proof of the violation of the agency policies, either

through testimony of others or regular evaluations of the volunteer's behavior that demonstrate unsatisfactory performance.

- d. also try to find out the volunteer's side of the story to determine if any extenuating circumstances exist.
 - e. thoroughly document the investigation and its results.
3. Apply the termination ruling fairly and equally.
- a. establish a graduated punishment system: warnings for first offenses or for minor transgressions, then more severe penalties.
 - b. relate the degree of punishment to the level of offense.
 - c. apply penalties even-handedly and without favoritism.
 - d. allow for an appeals process.
 - e. make use of a committee of peer volunteers to aid you.

Recruiting volunteers, managing them well, recognizing their efforts, enjoying their friendships, and letting go when the time comes feels a lot like life. If you know how to live well, you'll know how to manage well. It's like family. There's always something to learn. While the day-to-day tasks of scheduling and dispatching get tedious, managing volunteers is never boring. Above all, follow the advice of Julie Fletcher-Tighe of the Santa Cruz Red Cross. When asked what was special about their volunteer management style, she replied, "We try to be really nice to them."

AFTERWORD

A month ago I called Tommy Brown, Ira Doom's successor in Alabama, to tell him about this book. He got off the best one-liner I had heard during the whole period of research. He asked me what I was going to call the book. I said, *Succeeding With Volunteer Transportation*. He said, "Oh, it's fiction!"

While it doesn't fall into the category of fiction, one of the dangers of a book like this is the implication that these ideas represent fixed and finite knowledge, that Volunteer Wheels and the other programs have "figured out" volunteer transportation for all time. This information is an honest statement of what we know right now. Sure as sunrise, tomorrow we'll know something different. Once these pages are published they become useful history, not necessarily present experience. Volunteer Wheels continues to struggle and learn, as do the rest.

What, then, is reliable about what you've just read? Well, you can rely on the fact that these words fairly represent the experiences of eight different programs up to the date of copyright, nothing more. Use what you can.

I'll close with an appropriate Teddy Roosevelt quote.

It is not the critic who counts, or how the strong man stumbled and fell or whether the doer of deeds could have done them better. The credit belongs to the man who is actually in the arena, whose face is marred by dust and sweat and blood, who strives valiantly, who errs and comes up short

again and again, who knows the great enthusiasm, the great devotion and spends himself in a worthy cause, and if he fails, at least fails while enduring greatly, so that he'll never be with those cold and timid souls who know neither victory nor defeat.

Appendices

Glossary

Advance-Reservation: A ride requested and scheduled in advance of the day it is to be completed.

Agency-Based Volunteer Transportation: A volunteer transportation program professionally managed by a non-profit agency such as a chapter of the American Red Cross or a Volunteer Center.

Area Agency on Aging: An agency which distributes federal funds for programs for the elderly.

Community-Based Volunteer Transportation: A volunteer transportation program administered by a community, usually by a volunteer Board of Directors.

Demand-Response: Rides requested for specific times and dates with pre-arranged pick-up and drop-off locations.

Dispatching: Giving drivers the information they need to complete their rides. Communicating cancellations and other information to drivers. Managing road emergencies.

Door-To-Door: Passengers picked up at their place of residence and delivered to their desired destination or vice versa.

Fixed Route: Regularly scheduled bus service on designated routes for the general public.

One-Way Trips: Transporting a person from one pick-up location to one drop-off location.

Paratransit: (Para means "outside" or "beside.") A specialized transit system which operates as an adjunct to fixed route public transit.

Ride: A one-way trip.

Risk Management: Managing the financial and safety risks of an organization.

Round Trip: A trip beginning at one point and returning to that point. For accounting purposes, a round trip is two one-way trips.

Routing: Organizing ride requests in logical, efficient patterns.

Same-Day Service: Rides provided on the day requested.

Scheduling: Recording ride requests. Can be advance-reservation or same-day request.

Specialized Transit: A community transportation service other than a publicly operated fixed route transit service.

Transit: Conveying persons or goods from one place to another.

UMTA: Urban Mass Transportation Administration, the federal agency which oversees federal transportation programs and federal funding to states and localities for transit services.

Volunteer Center: A non-profit agency belonging to a national association of volunteer centers organized to promote volunteerism in local communities. Also called the Voluntary Action Center (VAC) in some communities.

Program Summaries

VOLUNTEER WHEELS

Agency-based

Former Director: Dennis Studebaker

Volunteer Wheels is located in Sonoma County, California, 60 miles north of San Francisco. It is a program of the Volunteer Center of Sonoma County.

In the 1960's Sonoma County began to grow. Between 1960 and 1989 its largest town, Santa Rosa, expanded from 20,000 people to over 100,000. By the early 1970's Sonoma County residents realized they had a public transportation problem and began to search for solutions.

The discussion centered on whether or not a transportation program would be started by the local Red Cross chapter or by the Volunteer Center. Red Cross ultimately declined. The Volunteer Center chose to operate it as a way of demonstrating the efficacy of using volunteers in specialized transit. The idea was: do a good job over a period of years and then share this experience with the nation. This book is an outgrowth of that commitment.

Volunteer Wheels was founded in 1975 to transport the elderly in Santa Rosa. It started with a paid coordinator and a handful of volunteers providing demand responsive, door-to-door transportation to a few hundred passengers using volunteers driving their own cars. Shortly thereafter a van was donated by a service organization to transport the physically disabled. Over the years Volunteer Wheels grew. We now own 7 wheelchair lift-equipped vans

and two cars. We have 120 volunteer drivers and three full time paid drivers who are supported by a professional administrative staff of a program director, a program coordinator, two half-time dispatchers and two half-time schedulers. Volunteer Wheels serves the urban community of greater Santa Rosa and the outlying areas of Sonoma County for those traveling cross-county.

Volunteer Wheels is somewhat unique in our field; not because of our size (at 36,000 rides a year there are many programs much larger) but because of our complexity. Few programs are all of the following:

1. A county's primary specialized transit service.
2. A service for seniors and physically disabled.
3. An urban and rural service.
4. Operated with a mixture of volunteer and paid drivers.
5. Operated with a mixture of cars and vans, some owned by the agency and some privately owned.
6. Scheduled and routed by hand (rural rides) and by computer (urban rides).

Because of our complexity and diversity Volunteer Wheels is in the extraordinary position of having directly experienced and wrestled with most of the issues that agency-based programs face.

Program Summary:

Annual number of one-way trips	36,000
Trips provided by paid drivers	9,000
Number of volunteers	120
Year established	1975
Type of administration	Agency-based
Type of service	Advance reservation, Demand response
Urban or rural	Both
Source of funding	City, County, Federal, United Way, Fares, Donation

SONOMA CARE-A-VAN

Community-based

Former Program Coordinator: Henry Eaton

Like Volunteer Wheels, Care-A-Van began service in Sonoma County in 1975. However, Care-A-Van is quite different from Volunteer Wheels. It is a community-based program, serving the Sonoma Valley, a collection of small towns around the town of Sonoma, with fixed route transit service. To augment the fixed routes, they provide door-to-door advance reservation rides two days a week.

Care-A-Van was started by one local clergyman, two F.I.S.H. volunteers (a Christian service group), and the willingness and generosity of a few others in the community. One of the founders, Rev. Alan Plotter, is still involved today. Henry Eaton joined the program in the late 1970's as a volunteer driver and was quickly appointed coordinator, a capacity he filled for many years.

Sonoma Valley has a strong sense of historical identity since before the days of statehood. The town of Sonoma is also blessed with a large upper-middle class retirement age population. These factors, combined with financial and technical support from the County and City of Sonoma, have contributed to the success of this community-based volunteer transportation program.

Though Care-A-Van has had its struggles, adequate funding has not been one of them. As Henry Eaton said, "money has been the least of our problems." There are three reasons for this:

1. they rely almost entirely on volunteers, so their overhead is very low;

2. they receive ample financial support from local government; and
3. they exist in an affluent community which supports their fund-raising efforts. Given these factors, it is not surprising that their financial needs are easily met. In fact, in most years they've had a budget surplus.

Managing their system is where they have been tested, since it is a large complex service operated entirely by volunteers. In recognition of this, they recently decided to pay their coordinator a part-time salary. One day they may need a full-time professional manager.

Henry conceded that there has generally been an abundance of volunteers, largely due to word of mouth recruiting. He went on to say the media is not a reliable resource for volunteer recruitment and that about 95% of their volunteers come by word-of-mouth. Small wonder. In a town the size of Sonoma, Care-A-Van is no secret. Anyone curious about it can find a neighbor who is involved. If they like what they hear they sign up.

The people at Care-A-Van are well aware that you can't influence word-of-mouth with slick public relations. They know word-of-mouth is a powerful marketing tool because it is the essence of honesty. They encourage their volunteers to speak freely about their experiences. The program is successful because the volunteers enjoy themselves and are willing to tell their neighbors.

Sonoma Care-A-Van is a model community-based program...an exceptional blend of voluntary action and government support.

Program Summary

Annual number of one-way trips	36,000
Trips provided by paid drivers	0
Number of volunteers	35
Year established	1975
Type of administration	Community-based
Type of service	Fixed route and, Advance reservation, Demand response
Urban or rural	Both
Source of funding	County, City, Federal, Donations

**AMERICAN RED CROSS,
SANTA CRUZ CHAPTER
Agency-based**

Transportation Coordinator:
Julie Fletcher-Tighe

In the late 1970's the Santa Cruz Chapter of the American Red Cross began providing out-of-county, long distance medical transportation using one mini-van. By 1984 their Board perceived a greater need for transportation services and decided to expand their service to its current level of 1,200 rides a year.

They use agency-owned vehicles, exclusively driven by volunteers. While previously funded by donations, they are now receiving a demonstration grant from the County which they are trying to convert into an ongoing contract.

According to Julie Fletcher-Tighe, their outstanding achievement is their ability to coordinate their service with other agencies. They fulfill a very specific, non-duplicated need in the community.

When asked why they use volunteer drivers, Julie said, "financially it's the only way we can do it." The majority of their drivers are retired men and they are extremely reliable. "There were only two times when a driver didn't show up in the past year. Our drivers rarely call in ill, either," Julie said. Many drivers have been with the program for years and years.

Julie said their ability to operate simply is their biggest advantage. Her passenger records are kept on 5 x 8 cards in a box. Driver information is neatly filed in a binder. The trip requests are kept on a simple list. Her drivers are reliable. Her vehicles are maintained and insured by Red Cross. The Santa Cruz Chapter of the American Red Cross is an example of how volunteer transportation can operate simply and inexpensively while providing an essential specialized transit service.

Program Summary

Annual number of one-way trips	1300
Trips provided by paid drivers	0
Number of volunteers	12
Year established	1975
Type of administration	Agency-based
Type of service	Advance reservation, Demand response

Urban or rural
Source of funding

Rural
County, United Way,
Donations

**AMERICAN CANCER SOCIETY,
SONOMA COUNTY UNIT**

Agency-based

Director of Patient Services: Taia Stewart

The Sonoma County American Cancer Society has been involved in volunteer transportation since the 1950's!

The American Cancer Society serves people with cancer who need access, sometimes daily, to medical treatment. Often public transit is either inadequate or non-existent. Taia Stewart and her staff recruit volunteer drivers in Sonoma County, assisted by volunteer recruiters in the outlying communities who recruit and coordinate their friends and neighbors.

The American Cancer Society has a clear advantage in volunteer recruitment because so many lives are intimately touched by cancer. When they recruit volunteer drivers they emphasize how the American Cancer Society saves lives by transporting patients to treatment. She hopes to make people think: "Gee, you mean I can save a life and the only tools I need are car keys!"

Taia said that while many, if not all, American Cancer Society units use volunteer drivers, they vary in management style and technique. Some units own their own vans and operate complex systems in urban environments. Others keep it simple by recruiting volunteers to drive their own cars, like the Sonoma County unit. Each unit has autonomy over their transportation system but their passenger criteria are always the same.

The American Cancer Society demonstrates the flexibility of volunteer transportation. It can be used to solve specific problems for clearly defined populations.

Program Summary

Annual number of one-way trips	4,100
Trips provided by paid drivers	38 (taxis)
Number of volunteers	120
Year established	late 1950's
Type of administration	Agency-based

Type of service	Advance reservation, Demand response
Urban or rural	Both
Source of funding	Private donations

SILVER KEY SENIOR SERVICES

Agency-based

Executive Director: Mikki Kraushaar

Silver Key Senior Services is located in Colorado Springs, Colorado. Twenty-two volunteer drivers operate Silver Key vans, augmented by another couple dozen volunteer drivers who drive their own cars. They, along with the office staff, assure an average of 300 to 350 daily passenger trips, which add up to 96,000 a year! Over 60% of their volunteer drivers are retirees. Mikki Kraushaar conveys that they are far more than drivers. They are friend, advocate, and confidante.

Silver Key serves an elderly client group of 12,000 unduplicated people annually. Believe it or not, they have 1,700 active volunteers throughout their agency with 234 in their transportation program alone! They conservatively estimate the dollar value of their volunteer hours to be \$1,796,295 annually (\$125,963 in transportation).

Silver Key is committed to volunteerism because they believe in the value of selfless giving, and because using volunteers insulates them from reliance on federal dollars. When Silver Key started in the early 1970's Mikki Kraushaar built the organization on the strength of volunteers, knowing full well that one day federal funding would dry up. Indeed it did in the Reagan era and her organization was largely untouched when other agencies suffered cut-backs.

Mikki believes that helping the elderly is a very special volunteer opportunity with wide appeal, and she communicates this when recruiting. Her staff trains their volunteers well and are conscientious about rewarding and recognizing their efforts. They daily let their volunteers know: "They are the heart of Silver Key."

Silver Key operates a fleet of 15 vans driven largely by volunteers. The volunteers who drive their own cars are called "Roadrunners." The Roadrunners handle the overflow when the

vans are scheduled to capacity and fill in the gaps when the vans break down. Their transportation service functions effectively and safely because of very strict risk management procedures. For example, they do not accept any volunteer driver who has ever had a drunken or reckless driving conviction. They permit no significant at-fault accidents in the past five years and no more than two non-fault accidents.

Along with the obvious challenge of continuously recruiting enough volunteers to fill their service needs, they are faced with recruiting in a transient community because many retired people in Colorado go south for the winter. As Mikki said, "The snowbirds go south in the winter and I go on the t.v. and cry for 'Help!'" Because Silver Key is so highly regarded in the community, they regularly receive good response to such pleas.

Transportation is only one of many services provided by Silver Key Senior Services. This exemplary agency has demonstrated the far-reaching potential of volunteerism in community service.

Program Summary

Annual number of one-way trips	96,000
Trips provided by paid drivers	24,000
Number of volunteer drivers	234
Year established	1971
Type of administration	Agency-based
Type of service	Advance reservation, Demand response
Urban or rural	Both
Source of funding	City, State, Federal, Donations, United Way

AMERICAN RED CROSS,

MILE HIGH CHAPTER

Agency-based Community

Programs and Youth Specialist: Pat Loose

Transportation Coordinator: Bob Williams

The Mile High Chapter of the American Red Cross is located in Denver, Colorado. Their transportation program dates back to World War I. There is a wonderful foot long photograph on their office wall of 95 square-jawed Red Cross matrons, attired in full military-looking uniforms, who composed their volunteer driving corps in 1919.

The World War I volunteer drivers of the Denver branch disbanded after the war but started again during World War II. The Mile High Chapter has been providing volunteer transportation ever since.

The Mile High Chapter now coordinates a volunteer transportation effort in five surrounding counties. They have 16 agency-owned cars and two wheelchair lift-equipped vans. The cars serve seniors, primarily. The vans are used to transport disabled children and adults. The Denver office directly dispatches eight of these cars. They have 100 volunteer drivers and no paid drivers. Their schedulers and dispatchers are volunteers as well. Bob Williams, their paid coordinator, works 3/4 time.

This program illustrates how success with volunteer recruitment varies from community to community. In the Mile High service area, the City of Aurora has virtually no difficulty with recruitment. They are blessed with a large population of retired military (an excellent resource for volunteer drivers). Adams County, largely a blue collar environment, on the other hand, struggles to recruit enough drivers to meet their minimum needs.

Recruiting in Denver is a challenge too, but they work at it consistently and have been able to sustain their program over the years. In fact, Red Cross demonstrates that volunteer transportation can flourish in a heavily populated urban area with all the attendant problems of mixed races and economic classes.

The most successful recruitment technique employed by the Mile High Chapter is word-of-mouth. Their volunteers enjoy this service very much and prove it by their reliability, their tenure with the program, and their willingness to recruit other volunteers. Pat Loose said their volunteer recognition activities communicate to the volunteers that they are greatly appreciated. She feels this helps encourage them to recruit their friends.

Pat Loose and Bob Williams both commented that it is not at all uncommon to have 10 and 15 year volunteers. They recently had a volunteer dispatcher retire after 35 years! Pat also said their volunteer drivers, schedulers, and dispatchers are the most reliable volunteers in the agency. She said, "They each have their assignment, and unless they're flat on their backs,

they'll be here. We've got one dispatcher who put his boots on and walked through a blizzard to fulfill his duties. They are a very, very highly dedicated group."

Financially the Mile High Chapter is uniquely positioned as full partners with United Way. This accounts for 75% of their operating budget and allows them to charge no fares. They do ask for donations, though, and sponsor regular fund-raising efforts.

One begins to grasp the history of this program in a story that began in 1955. A five year old boy needed transportation to a cerebral palsy center because both parents worked. Red Cross was called to help. He is now 38 years old and still rides with them every day of the week. He is part of their family. Red Cross is not the only specialized transit service in the Denver area, but they are a very important and highly regarded component of the specialized transit picture there.

Program Summary

Annual number of one-way trips	50,000
Trips provided by paid drivers	0
Number of volunteers	100
Year established	1919
Type of Administration	Agency-based
Type of service	Advance reservation, Demand response
Urban or rural	Both
Source of funding	United Way, donations

DEKALB VOLUNTEER CENTER

Agency-based

Associate Director: Karen Trzeciak

The DeKalb Volunteer Center has a brand new office complex which they managed to build by shrewd utilization of federal dollars and a local match of land from DeKalb Genetics, a leading corporation in the area. It houses their vehicle yard and a state-of-the art maintenance facility. There is a gigantic red Volunteer Center heart logo on the front of the building, visible from blocks away (an excellent marketing tool).

Karen Trzeciak explained that their paid drivers provide the bulk of their rides and that the volunteers do the longer out-of-county trips, primarily for medical appointments.

The DeKalb Volunteer Center was founded in 1973. They focus almost entirely on transportation. It is unique for a Volunteer Center to place such emphasis on transportation, but they believe it to be the most important need in their community.

Their transportation program started very simply when a couple of ladies in the community observed a transportation need and wondered if volunteers could fill it. The Volunteer Center decided to take on the challenge. Their early days were characterized by slow steady growth. In the last few years they have nearly doubled the number of trips annually.

The DeKalb Volunteer Center now operates 16 vans with paid drivers who provide the bulk of their rides, and 40 volunteer drivers for the 3,000 or so long distance runs they do every year. They have a paid dispatcher and scheduler to coordinate the rides delivered by paid drivers.

Karen said they do not struggle with volunteer recruitment. In fact, the program is so popular there are times they have to tell prospective volunteers they have no need of their services. This is delicate because they don't want to give the impression they *never* need more volunteers.

Part of their success with recruitment stems from Karen's expertise at marketing her program; partly from the fact that their program is extremely visible in the small farming communities in which they operate; and partly because they ask volunteers to drive the sort of trips for which volunteers are ideally suited—long easy-going rides with little or no stress and lots of friendly interaction.

Karen takes care of her people and treats them like family. For example, when volunteers drive they wear a special red vest which identifies them to the community. As a gag Karen gave one of the male volunteers red boxer shorts for his birthday.

Recently they won a state award for excellence in service. Instead of going to Chicago alone to accept the honor, Karen loaded up a van full of volunteers and they all went together to celebrate.

The DeKalb Volunteer Center is a jewel among volunteer transportation programs. Relatively speaking, they have no major problems.

They have adequate funding and an ample supply of volunteers to augment the rides provided by paid drivers.

Program Summary

Annual number of one-way trips	113,600
Trips provided by paid drivers	110,000
Number of volunteers	40
Year established	1973
Type of administration	Agency-based
Type of service	Advance reservation, Demand response
Urban or rural	Rural
Source of funding	Federal, State, United Way, grants membership drive, & township revenues

AREA IV AGENCY ON AGING AND COMMUNITY SERVICES

Community-based

Deputy Director for Community Service and Community Action Program: Jean Engelke

The Area IV Agency is located in Lafayette (home of Purdue University). It was in Indiana that the distinction between agency-based and community-based volunteer transportation occurred to me.

It was also here that a vision of the future of community-based volunteer transportation sparkled into view. Indiana (and its predecessor Huntsville, Alabama) may be the proving grounds for a revolution in community transit. What they have accomplished is amazingly cost-effective and easy to copy. It represents a sensible transit solution for rural communities that desperately need public transportation.

The Area IV Agency on Aging and Community Services serves eight counties including Tippecanoe. Being farm country, there is no fixed route public transit system. While there is a specialized transit service for the elderly and handicapped designated to serve all eight counties, their meager resources are entirely inadequate to handle the needs of everyone needing public transportation. The small towns of 500 to 1,000 people are no longer self-sufficient because of the farm crisis that has beset the Midwest. People are moving away and businesses are closing. The residents who remain

have to travel to the larger towns for essential goods, services, and recreation. If they can't drive, they're trapped.

In 1985 the Area IV agency searched for solutions. At first they didn't discover any. Some of the rural transit and specialized transit systems they researched were operating in the red because of small ridership potential. Continuing to search for an innovative solution, Jean Engelke was told about a unique program developed by Ira Doom in Huntsville, Alabama.

Ira Doom's office (the local office of the Alabama Department of Transportation) had offered to fund a van, vehicle insurance, and maintenance costs if the residents of an impoverished sector of the city of Huntsville would band together, take responsibility to operate the van, recruit volunteers to drive, and be responsible to pay for the gas. This program was very successful. In fact, it was so successful that it expanded into the surrounding rural areas as well.

Jean confesses that she went to Alabama tongue-in-cheek, not really expecting this to be an answer. What she found was an amazing success story of government in partnership with the people. In her own words: "I was impressed with the closeness of the communities and how they looked at this program as their baby. It was their program; it wasn't Ira's program nor did it belong to the city of Huntsville. This is because Ira built a spirit of partnership and empowered them to take ownership. It was truly their service. They were making a go of it."

Jean returned to Lafayette enthused, and with Ira's assistance wrote a two year Section 6 demonstration grant with the Urban Mass Transit Administration.

With the grant money, Area IV purchased five 15 passenger vans and selected 6 small farm towns in five different counties that had the greatest need.

The next step was town meetings. Each town had two or three meetings before they made a final decision to leap. Jean's method of explaining the program was simple and persuasive. She described it as follows:

I was honest and up front. I pulled no punches. I told them we've got a pilot program for two years. If it doesn't

work in two years, it will fold.

I explained the idea of building a partnership in order to make this possible at the least expense for all.

I described the partnership like this—the Town Board would appoint an operating Board as an arm of the Town Board with approximately 15 members. These operating Boards would run the program, i.e. find the schedulers, do all the P.R. and fund-raising, recruit, monitor, and supervise the drivers, fire the drivers when necessary, decide trip priorities and scheduling priorities. They would be responsible for the gas. Area IV's responsibilities would be to provide the van, pay for vehicle insurance and maintenance costs, and provide technical assistance. The technical assistance included help with preventive maintenance, advice on driver screening and training, CPR and first aid classes, and assistance with volunteer recognition.

The program began providing rides in 1986 and has been very successful ever since, relying on Section 18 operating assistance funds for the on-going expenses. Currently it costs only \$38,378 to run five vans in five different communities. The towns are raising money to match federal grants to replace their vans.

One of the beauties of community-based volunteer transportation is local control. The people themselves decide who goes where and when. The programs in Indiana serve the whole community, including children. In fact, in 1988 more children were transported in some areas than adults. They are getting to recreational and cultural events that were out of reach four years ago.

Seniors are receiving crucial medical attention and everyone has access to shopping and services most Americans take for granted. One 80 year old lady who used to see her elderly brother less than once a year (even though he lives a mere 1/2 hour away) now sees him every Friday.

An Urban Mass Transportation Administration study reported recently on Area IV's first year of operation:

It is estimated that in 12 months of operation these five systems should carry slightly over 6,000 passengers over a distance of nearly 57,000 miles. Such operating characteristics place this type of service into the lower end of figures reported for rural demand response transit systems in Indiana during 1986. However, as was pointed out earlier, these systems operate at a fraction of the cost of the typical demand response transit system. (pg. 18.)

This study, conducted in 1986, suggested that two or three years of successful operation would be necessary to conclude that such service should be promoted on a wide scale. It is over three years later. It is time for our policy makers to give this option serious consideration. We now have a way to provide inexpensive, effective public transit to rural communities.

Program Summary

Annual number of one-way trips	22,701
Trips provided by paid drivers	0
Number of volunteers	150
Year established	1986
Type of administration	Community-based
Urban or rural	Rural
Source of funding	Section 18

Appendix

Names, Addresses and Phone Numbers

American Cancer Society
Sonoma County Unit
826 St. Helena Ave.
Santa Rosa, CA 95404
(707) 545-6720

American Red Cross
Mile High Chapter
170 Steele St.
Denver, CO 80206
(303) 399-0550

American Red Cross
Santa Cruz County Chapter
2960 Soquel Ave.
Santa Cruz, CA 95062
(408) 462-2881

Area IV Agency on Aging and Community Services
10 N. Earl Ave.
Box 4727
Lafayette, IN 47903
(317) 447-7683

Community Transportation Association of America
Community Transportation Reporter:
The Magazine of the Rural and Specialized
Transit Industry
725 15th St., NW, Suite 900
Washington, DC 20005
(800) 527-8279

DeKalb Voluntary Action Center
1606 Bethany Rd.
Sycamore, IL 60178
(815) 758-0818

GATE Transportation
Ira Doom, Executive Director
1303 Carolina St.
Greensboro, NC 27401
(919) 275-0532

Paratransit Insurance Corporation
303 Heggenberger Rd., Suite 307
Oakland, CA 94621
(415) 635-5353

Silver Key Senior Services
2250 Bott Ave.
Colorado Springs, CO 80904
(719) 632-1521

Sonoma Care-A-Van
P.O. Box 723
Sonoma, CA 95476
(707) 996-7352

University of Wisconsin-Milwaukee
3270 N. Marietta Ave.
Milwaukee, WI 53201
(414) 229-4427

Volunteer Insurance Plan
P.O. Box 1183
San Jose, CA 95108
(408) 297-0755

Volunteer Center of Sonoma County
1041 4th St.
Santa Rosa, CA 95404
(707) 573-3399

Volunteer Wheels
1041 4th St.
Santa Rosa, CA 95404
(707) 573-3377

Community Transportation Association of America

TransNet

Driver hiring, personnel procedures, vehicle selection, maintenance, local fund-raising, coordination, training, contracting; all of these issues (and many more) challenge the managers of community transit systems. Through UMTA's National RTAP project, CTAA is addressing the needs of local operators by creating the first self-help network specifically designed for the community transportation industry. The network will provide technical assistance by putting people who request help in touch with operators who have faced and overcome similar problems.

How to Use the CTAA TransNet

Call on the UMTA RTAP Hotline (800/527-8279)! Someone will answer who can discuss your problem or question and develop a strategy to handle it. If a reference to a Networker would be an effective response, you will be put in contact with a CTAA TransNet member whose expertise is in your interest area. Most one-on-one contacts will be made by telephone or mail. On-site visits can be arranged if the need is warranted.

In order to maximize the resources of the CTAA TransNet, an effort will be made to work closely with state Departments of Transportation and state transit associations to develop technical assistance workshops using members of the TransNet. This will allow Networkers to share their experience with many operators.

If you are interested in becoming a member of the CTAA TransNet, please call on the RTAP Hotline. The TransNet needs community transportation professionals with expertise in all areas of transit provision. Expertise/skills are needed in any of the following areas: arbitration, communications equipment, substance abuse policy, employee negotiations, insurance, and the Rural Connection Program. Potential Networkers are required to prepare a submission form describing their transit systems and skill areas. The submission forms are then evaluated by a screening committee composed of CTAA members.

*Sample Bylaw for a Community-Based Service, Provided by the Area IV Agency on
Aging and Community Services*

Cooperative Agreement

Between

The _____ and the Area IV Agency on Aging and Community Services, Inc., agree to provide transportation services to persons of all ages in _____ and the surrounding area, under the Volunteer Transportation Program. The _____ will hereinafter be referred to as the _____, the Area IV Agency on Aging and Community Services, Inc., as the _____.

Both parties acknowledge the receipt of good and valuable consideration supporting the terms and conditions of this agreement which is as follows:

1. This agreement shall become effective on _____ 19__, and shall continue until _____ 19__, at which time a new agreement may be negotiated.
2. It is understood and agreed that the transportation services provided herein are in compliance with Title VI of the Civil Rights Act of 1964, and that no discrimination be made on the basis of race, color, sex, national origin or physical or mental handicap for the provision of these services.
3. The Host Community will recognize the complete authority the Project Agency has for approving of all the plans made for the operation of the transportation project as well as full authority to void any plans that are thought as unnecessary or are in conflict with the intent of the project.
4. If, with good reason, and after consultation with the Host Community, the Project Agency feels the transportation program needs to be terminated, the Host Community will return the vehicle to the Project Agency, in a condition equivalent to that in which it was received, allowing for normal wear and tear.
5. It may be necessary to make new rules regarding the transportation program and to present these changes to the Host Community. If the Host Community would not agree to these changes, the Program would immediately be terminated.

The Host Community agrees to:

1. Manage and operate the affairs of the Volunteer Transportation Program, either directly through the Town Board or through the establishment of a Transportation Operating Board of Directors. (See Attachment A.)
2. Furnish volunteer drivers to drive the van designated for this transportation project.
3. Pay for all gasoline costs that are incurred while serving the community.
4. Submit trip reports by the fifth of each month, showing the number of trips provided plus any other information required by the Project Agency.
5. Deliver the vehicle to the specified service repair garage for the vehicle's quarterly preventive maintenance and safety inspection or with new vehicles, inspected as required in the warranty.
6. To assist the Project Agency in locating a qualified First Aid/CPR trainer to conduct these classes for the volunteer drivers.

***Sample Bylaw for a Community-Based Service, Provided by the Area IV Agency on
Aging and Community Services (Continued)***

The Project Agency agrees to:

1. Grant the use of the motor vehicle identified as follows to the Host Community:
2. The named insured on the insurance policy will be the Project Agency and the insurance will provide coverage to the drivers from the Host Community. The insurance coverage is as follows:

Single Limit Liability -\$500,000

Medical Payments -2,000

Uninsured Motorist -500,000

Comprehensive - Actual Cash Value less 100.00

Deductible Collision - Actual Cash Value Less \$250.00 Deductible (The Project Agency will assume payment of any deductible).

3. Pay for all routine maintenance.
4. Pay for all necessary repairs during the term of this agreement.
5. Provide for preventive maintenance and safety inspection on the vehicle herein according to the approved Van Maintenance Report form.
6. Assist the communities in establishing general First Aid/CPR classes for all volunteer drivers on a periodic basis and a Defensive Driver's course whenever possible and to pay for all costs incurred.
7. Provide technical assistance to the Host Community when such assistance is requested.
8. Has authority to regulate safety standards including a safety inspection of vehicles by the volunteer drivers on a regular basis.
9. Provide for the initial painting of the name of the transportation project on the van.

Host Community Acceptance:

Project Agency Agreement:

Signature of Secretary

Signature of President of Board of Directors

Typed Name

Typed Name

Date

Date

The Secretary was authorized to sign on behalf of the Town Board and this was authorized at a Town Board meeting on:

***Sample Bylaw for a Community-Based Service, Provided by the Area IV Agency on
Aging and Community Services (Continued)***

Attachment A

The Town Board agrees that the Operating Board will do the following:

1. The membership of the Board shall consist of the Directors and other members as may be elected from time to time by the Board of Directors. Members who shall be elected by the Board of Directors may be removed by the Board of Directors with just cause.
2. It is anticipated that a minimum of seven to ten members make up the Operating Board of Directors.
3. Members of the Town Board shall advise and assist the Operating Board of Directors in managing the affairs of the Volunteer Transportation Project, unless the Operating Board is made up of the Town Board.
4. A majority of the members of the Operating Board must be present to take any action on the management and operation of the affairs of this Volunteer Transportation Project.
5. The Operating Board of Directors shall meet at least quarterly. The times and places of meetings of the membership shall be designated by the Board.
6. Special meetings of the Board of Directors may be called by the President or a majority of members of the Board. Notice of each special meeting shall be communicated to all Board members before the date of the meeting and shall state the purposes for which the meeting is called and the time and place it is to be held.
7. The Officers of this Operating Board shall be a President, Vice President, Secretary and Treasurer and other offices as may be deemed necessary and who are appointed by the Board of Directors. Any two offices, except the offices of the President and Vice President, may be held by the same person.

Volunteer Wheels Handbook for Volunteers

Welcome to Volunteer Wheels, one of the family of Volunteer Center programs which encourage volunteerism in Sonoma County.

This Handbook describes Volunteer Wheels (VW for short) in some detail so you can easily familiarize yourself with our history, our structure, and our operating procedures. Please keep this Handbook with you when you drive because it includes many useful tools such as maps and diagrams of mobile home parks.

We provide affordable, door-to-door transportation to:

- people who cannot drive, including children at risk of abuse;

- people who are unable to use public transportation;

- people who have no other transportation resources (such as family or friends).

All new clients must submit an application and a physician's referral to determine eligibility. The vast majority of our passengers are seniors and disabled persons. Without VW they would be entirely housebound and unable to continue to function independently in society.

Our History

In the early 1970's people became increasingly aware of the transportation problems facing elderly and disabled persons. In 1975 the Volunteer Center organized VW as a local solution to this problem. Using volunteer drivers was, at that time, a novel ideal.

In the early years VW operated only in Santa Rosa with two paid employees, one donated lift-equipped van, and a handful of volunteers. Much effort was spent informing the public that this service was available. We grew each year. By 1980 we had

expanded countywide and were providing approximately 14,000 trips a year. In 1984 we provided 34,000 rides. As this handbook is being revised in 1989 we are completing our 15th year of service and estimate completing 37,000 rides this year.

VW has 8 paid employees and approximately 120 volunteers. We own and operate 7 vans with wheelchair lifts and two autos. Many volunteers prefer to drive their own cars.

Organization

VW policies are determined by a committee composed of representatives from the Volunteer Center Board of Directors, including at least one active Wheels volunteer (who is not a Board member), and the VW Director, who manages the program and sees that the policies of the committee are implemented.

The Director also represents the agency in organizations such as the Paratransit Coordinating Committee of Sonoma County and the California Association for Coordinated Transportation.

Our Program Coordinator supervises the daily operations, including the work done by our schedulers and dispatchers, and the work done by our most important part-time staff member: YOU!

Our three paid van drivers work full-time. They transport our disabled clients in wheelchair lift-equipped vans.

VW also schedules and dispatches rides in coordination with other agencies who serve specific populations in the County.

How the Program is Financed

The annual operating budget for VW is in excess of \$275,000. The bulk of funds come from the County of Sonoma and the City of Santa Rosa (from state sales tax earmarked for public transportation). Pas-

senger fares comprise approximately 15% of our income. We receive additional financial assistance from United Way, special events, concerned individuals, corporations, and service clubs.

Where Do We Take Clients?

While 75% of our rides are to medical appointments, we recognize that people without transportation have wide-ranging needs. Because of this we don't prioritize our rides, with the exception of an occasional critical medical appointment that must take priority. We limit each client to two one-way trips or one round-trip per day, with a maximum of three travel days per week.

About Volunteer Driving

There are three classifications of volunteer drivers:

1. City drivers, using personal auto;
2. County drivers, using personal auto;
3. Drivers using VW owned vans and cars.

City drivers typically volunteer 1/2 day a week, although a handful drive one full day each week. City drivers provide rides within the greater Santa Rosa area, typically delivering one passenger per 1/2 hour on a schedule.

County drivers complete individual rides, scheduled in advance. A typical County ride might go from Santa Rosa to Sebastopol for a doctor's appointment. The driver waits for the passenger to finish and then returns home.

Volunteers who drive Wheels-owned vehicles generally volunteer 1/2 day a week.

Notes to All Volunteer Drivers

1. Our motto is: *safety first*. We prefer you arrive late rather than chance an accident!
2. Our office is air-conditioned in the summer; smoking is not permitted and hot "coffee" is almost always available in the kitchen.
3. With the exception of illness or emergencies, please let us know early when you are unable to drive. It is very difficult to find substitutes, especially on short notice.
4. Our insurance requires that all drivers adhere to various health, insurance, licens-

ing, and training requirements. Currently we require:

- a. A current Motor Vehicle Report. Please inform the Director if you cause an accident or receive a moving violation.
- b. A copy of your personal auto insurance and yearly renewal if driving your own vehicle.
- c. A written application with a signed statement of physical condition which includes any medicines being used which might cause drowsiness or impair your driving.
- d. Two training sessions offered by VW to be completed sometime in your first year: basic first-aid and defensive driving. Our van drivers receive additional training in the safe operation of their vehicle.
5. VW provides a \$1 million excess liability insurance policy to drivers who are driving their own vehicles. Volunteers are also covered by a blanket liability policy whenever they are volunteering, whether in or out of a vehicle.
6. We are required by law to charge fares. Because enough of our clients pay the full fare willingly, we can be quite lenient with those who are experiencing severe financial hardship. Those who pay a discount fare, or nothing at all, will show you a blue card. Some keep track of their rides and send us a check once a month. They will show you a red card. Convalescents and residential homes generally pay once a month for their residents.

7. All drivers who use their own cars can request reimbursement at a rate of \$.25 per mile, although it benefits the program greatly when those who can afford it do not request reimbursement, or accept a reduced rate such as \$.15 or \$.10 per mile. Those who do not claim reimbursement may legally deduct their miles from federal taxes at a rate established by the IRS.

Please turn in your hours and mileage form to the office by the 7th of each month, whether or not you request reimbursement. We need to report this information to our funding sources.

8. When you arrive at a client's house, go up to the door and ring the bell or knock—*Do Not Honk Your Horn!* Then you will be there should they need any assistance to your car. Once to the car, help them with their seat belt. We will not transport anyone who refuses to wear a seat belt unless they have a written exemption from a physician. Be sure to fasten your own...
9. Upon reaching the destination, offer any assistance necessary for the safety of the passengers. You are not, however, required to do any lifting or physical assistance which may cause you physical distress. Juveniles must be escorted door to door. We recommend that the receiving adult sign your schedule, indicating the time of arrival. This protects you and the program.
10. Always let the office know if any of the following occur:
 - a. you take a client to a different destination;
 - b. client advises they do not need a ride home;
 - c. client is not home when you arrive;
 - d. you cannot find client you are to take home;
 - e. any unusual problems occur.
11. We trust you will interact with our clients in a warm and friendly way. However, we recommend you not give out your personal phone number. If a passenger needs special assistance, let us know in the office and we will contact the appropriate social service agency.
12. A word about *cancellations*. Many of our passengers are frail or ill. As a result, they sometimes cancel appointments at the last minute, particularly in bad weather. Most of the time they call us and tell us; sometimes they don't. We have no way of planning for cancellations because they are random and differ from day to day. We beg your patience and understanding when they do occur. We also suggest County drivers phone their passengers before embarking on a ride. City drivers will simply have unrehearsed blank spaces in their schedule from time to time.
13. Volunteer driving is an exceptional volunteer opportunity. However, we find it isn't for everyone, which sometimes isn't clear until it's been tried. So you (and we) ought to approach your first three months on a trial basis. Once you've been with us for more than three months, we would appreciate some notice if you plan to move on to other activities. We've had one or two instances over the many years when we've had to ask a long term volunteer to leave due to misconduct or very unsatisfactory performance. Because of this experience, we now have a policy whereby a volunteer may be suspended for two weeks while a particular issue is being reviewed. He or she then has the right to ask for a review of a committee of other VW volunteers if the matter can't be resolved easily.
14. It is quite common to hear from our drivers that they receive more than they give. Nevertheless, twice a year we enjoy heaping on additional praise at our Annual Potluck Dinner and the Volunteer Center's Annual Recognition Dinner. These are fun events. We encourage you and your spouse to attend.
15. VW generally honors the major holidays such as Christmas, New Years Day, Thanksgiving, and so forth. If there is any question about your scheduled day, call the Program Coordinator before you drive.

Notes to City Drivers

1. In the back of the Handbook there is a sample computer-generated trip schedule. There are footnotes with it that explain each element of a trip. Please study this prior to your training session so you are familiar with how we schedule rides.
2. City drivers generally drive the same 1/2 day each week. We know how important flexibility is to you, so we have a special calendar in the office. Once you sign out, you have no further commitment to that day.

3. Often times you will need to communicate some change or correction having to do with client information. Telling someone in the office has proven inefficient. So we devised the "Write-It-Don't-Say-It" form. Record your information on this form and we'll be sure to make the correction.

Section for Drivers of Agency-Owned Vans and Autos

The first thing to do each day is check the board above the couch for important maintenance information. This info will change from day to day.

Please fill out your maintenance sheet before embarking. Be sure to record any mechanical problems you discover so they can be attended to. Inform the Program Director *verbally and immediately* if you perceive anything wrong with your vehicle which you feel might represent a safety risk.

Obviously, driving a van is different than driving a car. Because it is bigger, at first it may seem unwieldy to you. Use your mirrors well and you will have excellent visibility. We made custom lift covers that do not block side visibility for maximum safety.

You must have 10 feet clearance. If you don't have 10 feet, don't drive under a solid object. Please pay careful attention to clearance. Fiberglass bubble tops are expensive to repair.

Passengers entering and exiting a van may experience difficulty negotiating the steps. Please assist them up and down the steps by standing outside the van as they embark and disembark. If a passenger has too much difficulty with the steps, load them on the van via the lift. Be extremely careful with this, as the lift is unsteady. You may need to go up on the lift with them, or steady them from the ground as they go up or down. Use caution and common sense.

Passengers must wear seat belts at all times. They must keep their seat belt on until the vehicle has come to a complete stop.

Tying a wheelchair down is a special area of knowledge which will not be described here, although we would like you to know how to do this. It will be demonstrated during your training session. Once a chair is tied down, please be certain to *Use the Lap belt restraint, which acts as a seatbelt for the client in a wheelchair. There is never an exception to the rule of always using a lap belt. It does no good to secure the wheelchair to the floor if the client is not secured to the wheelchair.*

If you feel a passenger cannot be transported safely, don't take them. You must always have the final word. You have full authorization to deny a rider for safety reasons. Of course, always inform the office if this happens.

If you have an *emergency* on the road, be certain to attract immediate attention by stating clearly over the two-way radio: *"This is M-2...I have an emergency...Repeat, I have an emergency."* As soon as the supervisor comes to the radio, explain as concisely as possible what the emergency is and what your location is. We'll need to know if in your judgement we should call 911 and whether you need police, fire, or ambulance.

Accident report forms are in every vehicle, as are registration papers and the name and policy numbers of our vehicle insurance. If you have an accident, fill out the forms completely and have your passengers fill out the card included in the packet.

You will be shown how to operate the lift safely. Remember to be certain the lift covers are off the lift before you begin to operate it or the covers will be torn to shreds.

Always say our call letters when commencing and ending a transmission on our two-way radio.

Please avoid the use of inappropriate language on the air. If you wish to use common CB terms such as 10-4, that is fine. Just make sure you are understood.

With respect to air conditioners, it helps if you occasionally cycle the A/C during the winter months to keep it in good working order. During the summer months, if you hop in the van and it's very warm inside, open the windows for the first five minutes of air conditioning. This blows out the hot air. If you're idling for a long time, turn the A/C off.

When you return to our parking lot, be certain to turn off the lift interlock switch and any internal lights or the battery will be dead in the morning. The radios turn off with the ignition.

If your van is dirty and you have a little extra time, please give it a wash. We have cleaning utensils at the office. It helps to take five minutes and just wash off the road dirt if nothing else. Remember, a clean van runs better!

Volunteer Wheels
1041 4th Street
Santa Rosa, CA 95404-4329
(707) 573-3377
Toll Free (800) 992-1006

Confidential
For Office Use Only

1. Approved by: _____
2. Card Made: _____
3. Late Client Call: _____

Application For Volunteer Wheels Service

Name _____
Last Name First Name MI

Address _____

City _____ State _____ Zip Code _____

Birth Date: _____ ☐ Male ☐ Female

Phone Number Day: _____ Evening: _____

Number in Household (circle one) 1 2 3 4 5 6+
(Private Residence)

Emergency Contact

Name _____
Last Name First Name

Relationship _____

Phone Number Day: _____ Evening: _____

Are you disabled? ☐ Yes ☐ No Nature of disability (if applicable) _____

Must use a wheelchair ☐ Yes ☐ No; Cane ☐ Yes ☐ No; Walker ☐ Yes ☐ No

Need for Service Permanent Temporary until: _____

I need to use Volunteer Wheels because: (please check all that apply)

- ☐ I do not drive.
☐ I am unable to arrange some or all of my transportation through friends and family.
☐ I cannot afford to take a taxi on a regular basis.
☐ I cannot ride the bus because _____.

☐ I understand there is a charge for this service and promise to pay the fare each time I ride.

☐ I will pay the fare by check each month.

☐ I need to discuss the fare with the Volunteer Wheels staff.

Signature _____ Date _____

This application will be reviewed and you will be notified regarding your eligibility.

Physician's Certification of Need For Volunteer Wheels Service

In order to qualify for Volunteer Wheels service you must have your physician complete and sign this form. Please mail it to Volunteer Wheels along with your completed application.

Thank you.

I, Dr. _____, certify that _____ is unable to
(Please print) (Client Name)

ride public transit and therefore requires Volunteer Wheels door-to-door transportation for the following physical, mental or emotional reasons.

Signature _____ Date _____

Volunteer Wheels
1041 4th Street
Santa Rosa, CA 95404-4329
(707) 573-3377 • Toll Free (800) 992-1006

Sample Computer Schedule

2:30	Doe, Jane	Satellite Dialysis	4916 Seawolf Drive
	707/838-0002 ¹	1255 No. Dutton	
	AMB. Rating: B ²	Map Grid: F-7 ⁴	Map Grid: E-11
		Trip Ref: 4:30 ⁵	Pays: Red ⁷
		Trip Notes: pick-up early ⁶	
	Client Info ³ : uses a walker		

Explanatory Notes

1. This is the passenger's phone number.
2. The ambulatory rating allows us to skillfully match the passenger's range of physical motion with the correct vehicle. This is particularly important information when more than one passenger needs to be assigned to a vehicle (because one will have to sit in the back seat and many of our clients have difficulty with back seats.) Remember, physical conditions improve and deteriorate. Please inform the office when the amb. rating needs adjustment so we can change it in the computer.
3. The client information that appears on this line is information that is unique to that client or their place of residence. It will always appear whenever that client's name appears on the schedule. This differs from the Trip Note (6), which is information about that particular trip only.
4. We use AAA maps only. The grids will help you locate a street quickly on the AAA map. Maps are available in the office.
5. The trip reference tells you the appointment time (not the pick-up time) of the return trip. Therefore, if it says 4:30, you can inform the client that a driver will pick them up sometime after 4:00 (or approximately half an hour prior to the appointment time).
6. Trip Notes (see 3 above).
7. "Yes" means to expect the full fare in cash. "Red" means they pay each month by check. If there is amount indicated like .25, it means their discount fare is a quarter.

Volunteer Wheels
1041 4th Street
Santa Rosa, CA 95404-4329
(707) 573-3377 • Toll Free (800) 992-1006

To All Van Drivers: A daily vehicle preventive maintenance record must be completed and kept on file. Paid drivers can submit completed form once a week. Volunteer drivers should hand in their completed form each day. If a problem needs immediate attention, please inform the program director verbally as well as noting it on this form.

Volunteer Wheels Vehicle Preventive Maintenance and Daily Inspection Report

Date(s) _____ 19 _____ Van No. _____

Mileage: _____ / _____
Beginning Ending

Driver: _____

Check if O.K. X if Needs Attention Include Comments to Help Clarify Problems

<i>Daily</i>						<i>Weekly</i>
M	T	W	TH	F		Volunteers should perform weekly inspection each Thursday.
					Water, oil, gas and air. Check for proper levels.	Seat Belts. Check for wear and securement.
					Tires/Body. Check for Damage.	Doors, Emergency Releases and Windows. Proper operation.
					Glass and Mirrors. Check for cracks and cleanliness.	Seats, Handrails and Modesty Panels. Check securement.
					Wipers and Washer.	First Aid Kit. For completeness.
					Horn.	Comments and Other Mechanical Difficulties:
					Indicator Lights.	
					Parking Brakes.	
					Brakes.	
					Radio and P.A.	
					Warning Devices.	
					Exterior and Interior Lighting System. Lift. Cycle lift and visually inspect for leaks, damaged hoses, loose fasteners, cables and chains. (Applies only if lift will be in use that day.)	
					Fuel.* # Gallons	

*Please fill tank (or tanks) when at or below a half a tank. Indicate number of gallons added. Write an "R" if gassed at Redwood Oil.

Form Evaluated _____

*** Must be to the VW Office by the 7th of the Month in order to Qualify for Reimbursement. ***

Volunteer Wheels Mileage Expense Claim

Name _____

Travel Month _____

Date	Client Name	Speedometer Reading		Total Miles	Total Hours
		Start	Finish		
1.					
2.					
3.					
4.					
5.					
6.					
7.					
8.					
9.					
10.					
11.					
12.					
13.					
14.					
15.					
16.					
17.					
18.					
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20.					
21.					
22.					
23.					
24.					
25.					
26.					
27.					
28.					
29.					
30.					
31.					

Signature _____

Totals: _____ Miles _____ Hours

Date _____

X @ _____ Allowable reimbursement up to

25¢ per mile. (Any amount over 12¢ per mile is taxable income according to the IRS.)

Total Reimbursement Claimed \$ _____

Thank you!

Volunteer Wheels

Volunteer Driver Application

Date of Birth _____ Driver's License # _____

Name _____ Street Address _____

City _____ Zip _____ Phone _____

In Case of Emergency, Notify _____ Phone _____

Current Employer: Company _____ Address _____

Position Held _____ From _____

Last Employer: Company _____ Address _____

Position Held _____ From _____ To _____

Reason for Leaving _____

Special Certificates: i.e. CPR, Medical Certificate, Defensive Driving, First Aid. (Indicate certificate(s) and expiration date.): _____

Accident Record for the Past Five Years. (Attach sheet if more space is needed)

Date	Nature of Accident (head-on, rear-end, etc.)	Were you at fault? Yes/No	Fatalities	Injuries
1. _____	_____	_____	_____	_____
2. _____	_____	_____	_____	_____
3. _____	_____	_____	_____	_____

Traffic Convictions (Moving Violations Only) for the Past Five Years

Location (City and State)	Date	Infraction	Penalty
1. _____	_____	_____	_____
2. _____	_____	_____	_____
3. _____	_____	_____	_____

A. Have you ever been denied a license, permit or privilege operate a motor vehicle? ☐ Yes ☐ No

B. Has any license, permit or privilege ever been to suspended or revoked ? ☐ Yes ☐ No

"I agree to read the Volunteer Wheels Handbook and abide by the policies therein, including attending a defensive driving and First Aid/CPR class in my first year of volunteering, provided by Volunteer Wheels. I will inform Volunteer Wheels of any moving violations or at-fault accidents that occur during my tenure as a volunteer whether or not they occur while volunteering, and agree to maintain at least the minimum level of auto insurance on my vehicle if driving my personal auto as a volunteer.

I also understand it is the policy of Volunteer Wheels that all passengers and drivers must at all times be seatbelted when riding with Volunteer Wheels. I agree to abide by this policy and will not transport a passenger who refuses to fasten or have their seatbelt fastened unless excused from this requirement with a physician's certificate.

This certifies that this application was completed by me, and that all entries on it and information in it are true and complete to the best of my knowledge."

Signed _____ Date _____

Driver's Statement of Medical Condition

Below is a check list of certain medical conditions, the drugs commonly prescribed and their potential side effects on driving. Check any that apply to you and describe below your condition, level of medication, the effects it has on your driving, and any other comments relative to how your physical or emotional condition and/or drugs taken influences your ability to drive safely. Then sign and date in the space below.

If you have *no* physical or emotional conditions that impair your driving and currently take no drugs that impair your driving, simply sign and date this page below.

Chronic Condition	Drug Type	Side-Effects on driving
<input type="checkbox"/> Arthritis	Analgesics	Drowsiness, inability to concentrate
<input type="checkbox"/> Allergies	Antihistamines	Drowsiness, confusion
<input type="checkbox"/> Common Cold	Antihistamines	Drowsiness, blurred vision, dizziness
<input type="checkbox"/> Diabetes	Oral Hypoglycemic	Drowsiness, inability to concentrate
<input type="checkbox"/> Hypertension	Antihyperactives	Drowsiness
<input type="checkbox"/> Rheumatism	Analgesics	Drowsiness, inability to concentrate
<input type="checkbox"/> Weight Control	Stimulants	False feeling of alertness, overexcitability

Emotional State	Drug Type	Side-Effects on driving
<input type="checkbox"/> Anxiety	Sedatives	Drowsiness, staggering
<input type="checkbox"/> Depression	Stimulants	False feeling of alertness, overexcitability
<input type="checkbox"/> Fatigue	Stimulants	False feeling of alertness, overexcitability

Comments:

Signature _____ **Date** _____

Exit Interview Questions

1. Why have you decided to leave the volunteer position?
2. How would you describe your relations with other volunteers?
3. How would you describe your relations with agency staff?
4. How did we do at allowing you to do the type of volunteer work you were really interested in?
5. What did you like and not like about the volunteer program?
6. What recommendations would you make for changes in the volunteer program?
7. If you were turning this job over to your best friend, what would you say was the best thing about it? The worst?
8. How did the initial description of the volunteer job match with the reality?
9. What, if anything, have you gotten out of this volunteer job?
10. What didn't we tell you about the job that you would have liked to know?
11. What kind of volunteer job are you looking for now?

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Appendix

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WHAT OTHERS ARE SAYING ABOUT ***SUCCEEDING WITH VOLUNTEER TRANSPORTATION***:

As the field of volunteer management matures, more and more specialized information is needed. Dennis Studebaker has provided practical, thorough, and easy-to-use information on a critical specialty—volunteer transportation. Every reader, and in fact all of us, will benefit from his effort and experience.

Sue Vineyard, Author, Trainer &
Consultant in Volunteerism
Downers Grove, Illinois

This work is a substantial gift to others.

Millicent "Mikki" Kraushaar,
President-Executive Director
Silver Key Senior Services
Colorado Springs, Colorado

Succeeding With Volunteer Transportation is delightful, informative, and a must for anyone either starting or actively involved in a volunteer transportation program. It will bring insight and inspiration to many seeking to provide needed transportation in their community.

Karen Trzeciak, Assoc. Director
Voluntary Action Center
Sycamore, Illinois

This book is essential for those in volunteer management because it blends mission and seasoning.

Ira Doom, Executive Director
GATES Transportation
Greensboro, No. Carolina

Your book was a great help. It convinced me that I am on the right track with re-organizing my volunteer program. I especially liked the section on volunteer recruitment. The ideas were brief, specific, and easy to see how to implement.

DeEtta Nicely, Transit Coordinator
County of Monterey, California

The content is right on target with answers to my questions that were easy to digest and review. These pages were a breeze and to the point. I also liked the honest, but motivating GO VOLUNTEERS! sales pitch throughout. We all need the boost.

Marion Marks, Executive Director
Coordinated Transportation Systems
Gainesville, Florida

Reading stories of the other volunteer transportation groups makes me think about some new ideas and some bigger dreams.

Rev. Alan Piotter
Co-Founder, Sonoma Caravan
Sonoma, California

SPONSORED BY THE VOLUNTEER CENTER OF SONOMA COUNTY, CALIFORNIA