Assisted Transportation Volunteer Driver Program Tool Kit

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Assisted Transportation Volunteer Driver Program Tool Kit
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Introduction

A vibrant community depends on the participation and contributions of all its members. It provides its seniors with services, goods, information and relationships. Seniors, in turn, contribute family ties, helping hands, volunteer activity, knowledge, experience and history.

Whether for access to services, or for socialization, mobility is critical to the quality of life, health, wellness and peace of mind of seniors. The challenge is meeting the special transportation needs of seniors in need so that they can enjoy the last years of their lives, living independently in their own homes and connected to their communities. Lost mobility jeopardizes not only the physical and emotional health of the individual, who may feel a sense of loss and independence, but also the quality of their community. Transportation, therefore, is vital to providing mobility and reducing social isolation whether seniors are ageing in their homes, or in assisted living.

Physical and mental limitations that make it difficult or impossible to drive will also make it just as difficult or impossible for a senior to use conventional forms of public transportation. A senior may be unable to get to transit stops, travel alone, carry heavy loads, stand for a period of time, or stay alone at a destination. These limitations pose specific challenges in meeting the needs to providing assisted transportation. As this demographic is made up of some of our most vulnerable citizens, it is essential that volunteer programs providing assisted transportation are following best practices in volunteer involvement.

Volunteer Driver Program Took Kit

This Volunteer Driver Program Tool Kit was developed by Dandelionz Leadership Strategies for the Edmonton Seniors Coordinating Council to strengthen the capacity of senior-serving organizations in Edmonton to provide assisted transportation. It comes in two parts:

1. *Volunteer Driver Program Tool Kit*: a 22 section guide to help in the planning, development and audit of volunteer driver programs. While the checklists, samples and forms are not exhaustive, and may need customization for individual programs, they will help act as a reminder of the components required to manage the volunteer base.
2. *Assisted Transportation Volunteer Driver Program, Volunteer Management Resources*: This supplementary 11 section binder of resources is to support staff managing a Volunteer Driver Program, connecting them to best practices and professional development in volunteer management. Resource #1, for example, includes national,

provincial and local volunteer centers, professional support organizations and current standards of practice.

Definitions for the Volunteer Driver Program Tool Kit

For the purpose of this Tool Kit, *assisted transportation* is defined by the Edmonton Seniors Coordinating Council as providing door-through-door service for seniors that require enhanced service. Door through door means that the rider may need assistance to prepare for and return from a ride, as well as may need assistance to enter the vehicle and the building at their destination.

[ABCD] has been used in these documents as an example organization. If using a sample, simply insert the name of your organization where there is an [ABCD].

Canadian Code for Volunteer Involvement

The standard of care for volunteers in the Tool Kit is guided by *the Canadian Code of Volunteer Involvement (the Code)*. (see Resource #2, Volunteer Management Resources binder) This document was launched in 2001 by Volunteer Canada as a flagship resource for Canadian volunteer programs during the International Year of the Volunteer. The Code has since been revised in 2006 in partnership between Volunteer Canada and the Canadian Administrators of Volunteer Resources, a national professional association for volunteer managers. It sets the benchmark for practice in Volunteer Management and can be found at www.volunteer.ca

Also included in the Volunteer Management Resources binder (see Resource #3) is an audit tool that mirrors the Code and can be used for planning, development and evaluation of a volunteer program.

The *Canadian Code for Volunteer Involvement* is comprehensive, and in some organizations, it might not be possible to immediately implement all components. It does, however, provide a standard to strive for, and includes three important elements that articulate overarching values, guiding principles, and organizational standards applicable to all volunteer programs. They are outlined below.

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Values for Volunteer Involvement

- Volunteer involvement is vital to a just and democratic society. It fosters civic responsibility, participation and interaction.
- Volunteer involvement strengthens communities. It promotes change and development by identifying and responding to community needs.
- Volunteer involvement mutually benefits both the volunteer and [ABCD]. It increases the capacity for [ABCD] to accomplish its goals, and provides volunteers with opportunities to develop and contribute.
- Volunteer involvement is based on relationships. It creates opportunities for [ABCD] to accomplish its goals by engaging and involving volunteers. It allows volunteers opportunities to give back to the community in a meaningful way.

Guiding Principles

- Volunteer have rights. [ABCD] recognizes that volunteers are vital human resources and commits to appropriate infrastructure to support volunteers.
- [ABCD]'s practices ensure effective volunteer involvement.
- [ABCD] commits to providing a safe and supportive environment for volunteers.
- Volunteers have responsibilities. Volunteers make a commitment and are accountable to [ABCD].
- Volunteers act with respect to beneficiaries and the community.
- Volunteers act responsibly and with integrity.

Organizational Standards

1. <u>Mission based approach</u>: The Board of Directors, leadership volunteers and staff acknowledge and support the vital role of volunteers in achieving purpose and mission of [ABCD].
2. <u>Human Resources</u>: Volunteers are welcomed and treated as valued and integral members of [ABCD]'s human resources. [ABCD] has a planned approach for volunteer involvement that includes linking volunteers to the achievement of [ABCD]'s mission, providing the appropriate human and financial resources to support the volunteer program and establishing policies for effective management.
3. <u>Program Planning and Policies</u>: Policies and procedures are adopted by the organization to provide a framework that defines and supports the involvement of volunteers.

4. <u>Program Administration</u>: [ABCD] has a clearly designated individual with appropriate qualifications responsible for the volunteer program.
5. <u>Volunteer Roles</u>: Volunteer roles address the mission or purpose of [ABCD] and involve volunteers in meaningful ways that reflect the abilities, needs and backgrounds of the volunteer and [ABCD].
6. <u>Recruitment</u>: Volunteer recruitment incorporates internal and external strategies to reach out and involve a diverse volunteer base.
7. <u>Screening</u>: A clearly communicated volunteer screening process is adopted and consistently applied by [ABCD].
8. <u>Orientation and Training</u>: Each volunteer is provided with an orientation to [ABCD], its policies and practices, including the rights and responsibilities of volunteers. Each volunteer receives training customized to the volunteer role and the individual needs of the volunteer.
9. <u>Supervision</u>: Volunteers receive a level of supervision appropriate to the task and are provided regular opportunities to give and receive feedback.
10. <u>Recognition</u>: The contributions of volunteers are consistently acknowledged with formal and informal methods of recognition.
11. <u>Record management</u>: Standardized documentation and records management practices are followed in line with the relevant legislation.
12. <u>Evaluation</u>: The impact and contribution of volunteers and the volunteer program are continually evaluated to ensure the needs of the organization are being met in fulfilling its mandate.

To ensure that volunteer driver programs providing assisted transportation are following best practices in volunteer involvement, it is recommended that each volunteer driver program:
1. Examines the *Canadian Code of Volunteer Involvement*
2. Develops statements of values based on the Code (or adopt those from the Code)
3. Develops statements of principle for their programs (or adopt those from the Code) and
4. Strives to follow the guidelines for standards of practice in program development and evaluation.

The standards of practice for volunteer involvement in this Volunteer Driver Program Tool Kit have been guided by the sources listed in Section 22 of this Kit, *Acknowledgement and Sources*. There are fewer Canadian sources than American, however, there are great guides and examples of the experience of volunteer driving in both. Best practices in the volunteer management practice is similar. It is recommended that for specific legislative guidelines or insurances that are governed provincially, to check with provincial sources of information.

Volunteer Canada

A useful tool to guide program development for assisted transportation comes from Volunteer Canada. Developed in collaboration with the Ontario Screening Initiative in 2002, the *Volunteer Transportation Guide; A Screening Tool* contains information on:

- Qualifying volunteer drivers
- Setting boundaries
- Volunteer training
- Training tips and tools
- Supervision and support
- Record keeping
- Sample forms

The Volunteer Transportation Guide; A Screening Tool can be found at:

http://volunteer.ca/files/Transportation.pdf

Other useful guides providing resources to this Tool Kit were developed in Maryland, Washington, Colorado and Maine. Supported by the Washington State Department of Transportation is the *Volunteer Drivers Guide--A Guide to Best Practices* and by the US Administration on Aging is *A Solutions Package for Volunteer Transportation Programs, Transportation Solution for Caregivers.* The most comprehensive guide by far is available through the Beverly Foundation in Albuquerque, New Mexico.

The Beverly Foundation

Founded in 1977, The Beverly Foundation's mission is to foster new ideas and options to enhance mobility and transportation for today's and tomorrow's seniors. The Foundation pursues this mission through research activities, community outreach, and technical assistance products. Senior transportation and mobility are central to the Beverly Foundation's mission.

The Foundation emphasizes transportation options for older adults which are essential to their ability to get where they need to go when they have limited their driving or have outlived their driving expectancy. It operates a STAR Awards program that surveys senior transportation programs across the U.S., evaluating their effectiveness. The Beverly Foundation then facilitates the sharing of best practices through downloadable, copyrighted material on their website, presentations and webinars.

Research conducted by the Beverly Foundation, and policy and program initiatives of government and non-profit agencies at national, state, and local level of the United States, have defined the 5 A's of senior transportation. Today, they have been adopted as criteria for standards in senior transportation.

Adopting senior friendliness criteria provides a means for thinking about and assessing just how senior friendly a transportation service is, or could be. Such criteria also serve to establish a baseline for measuring the effectiveness of coordination efforts and provide benchmarks that help move coordination initiatives forward.

The 5 A's of Senior Friendly Transportation

- **Availability**: Transportation services are available to seniors. Not only are services offered, but they meet expectations of time availability (evenings/weekends) and quantity (rides not limited).
- **Acceptability**: Transportation services are acceptable to seniors. Service quality is deemed satisfactory in terms of advance scheduling, vehicle cleanliness, driver sensitivity to seniors, and wait time.
- **Accessibility**: Transportation services that seniors can access. Services are easy to use because they offer supportive assistance (e.g. driver comes to door) and they provide rides where seniors need to go.

- **Adaptability**: Transportation services that can be adapted to senior need. Services accommodate seniors' needs for scheduling multiple stops, and providing additional support (assistance with walkers and help at destination).
- **Affordability**: Transportation services are affordable for seniors and the program. The potential for low-cost operations can enable programs to offer services free of charge, and to be financially sustainable.

Senior Friendliness & Volunteer Driver Programs, Volunteer Driver TurnKey Kit
2008 Beverly Foundation

Beverly Foundation Volunteer Driver Turnkey Kit

To ensure that an assisted transportation system that serves Edmonton seniors is guided by current practices and tools for engagement, one needs to turn to the Beverly Foundation. The Foundation has a comprehensive, no cost, program planning and evaluation Turn Key Kit available at: http://www.beverlyfoundation.org/turnkeykit/   The Kit contains the following:

Planning Tools
- 20 Tips on Planning
- Discussion of Planning
- White Paper on Volunteer Drivers
- Sample Business Plan
- Sample Budget
- Community Survey Instrument
- Risk and Risk Management Strategies
- Transit Options Booklet

Implementation Tools
- 20 Tips on Implementation
- Discussion of Implementation
- 20 Tips for Riders
- 20 Tips for Drivers
- Policy and Procedures Manual Outline
- Recruitment, Training, and Retention
- Volunteer Management Checklist
- Volunteer Reimbursement

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- Computer Program for Good Management

Evaluation Tools
- 20 Tips on Evaluation
- Discussion of Evaluation
- Quality of Life Assessment
- Telephone Survey
- Question Bank for Rider Feedback
- Senior Friendliness Evaluation for Public and Para-transit Services
- Senior Friendliness Evaluation for Volunteer Driver Programs

This "how to" kit includes materials that can be downloaded to assist program planning and evaluation of new or existing models or programs. No re-inventing the wheel.

This Volunteer Driver Program Tool Kit, funded by the Edmonton Seniors Coordinating Council, provides information, check lists and tools to support assisted transportation programs. It was developed in easy to share sections so that it can be widely distributed amongst senior-serving organizations, and also to demonstrate the various components of the management of a volunteer driver program.

These documents and resources are meant to empower and support programs and volunteers throughout their experience while supporting seniors in our community who require assisted transportation. The outcome is that seniors will have improved mobility, personal well-being and will feel like a part of their community; and the community benefits from senior participation.

Volunteer Driver Program Planning

This tool can be used for planning a volunteer driving program, and also for doing a volunteer program review to assess a current program. It includes a Volunteer Management Checklist that may be used to build or audit program components.

Steps to Planning your Volunteer Driving Program

☐ Gather information about community transportation needs and challenges.

☐ Gather information about transit options in the community.

☐ Conduct surveys of transportation challenges and preferences.

☐ Prepare a booklet on transportation options.

☐ Gather and review information on volunteer driver program models.

☐ Conduct a risk management overview: exposure, liability and insurances.

☐ Identify insurance requirements and options.

☐ Develop communications and information meetings with the community.

☐ Prepare a service plan.
  - o Decide on your service area
  - o Decide on and prioritize the types of rides to be provided
  - o Develop eligibility requirements for ridership (location, destination, age, physical and mental abilities, ability to pay)

☐ Plan service delivery.
  - o Days and hours of service
  - o Reservations, scheduling and cancellations
  - o Passenger assistance
  - o Rider responsibilities
  - o Service on severe weather days
  - o Decide on vehicle types and ownership.

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☐ Plan for infrastructure and staffing (paid and volunteer).

☐ Develop the program to include all components of driver and volunteer involvement.

☐ Use the *Canadian Code of Volunteer Involvement* as a guide for volunteer program development.

☐ Build in evaluative processes.

☐ Inform and involve human services and transit providers.

☐ Develop opportunities for sponsorship.

☐ Secure program funding.

☐ Enjoy building relationships between your volunteer drivers and [ABCD]'s clients!

Volunteer Driver checklist
Intentional volunteer stewardship is vital to a well-managed volunteer driver program. The following check list helps to review whether the right components are in place.

☐ Targeted recruitment strategies for matching the right person to the volunteer role

☐ Application form with enough information that a volunteer can self-screen

☐ Volunteer driver background check.

    o Motor vehicle driver's license

    o Driver record (abstract) check

    o Proof of valid vehicle registration

    o Proof of valid vehicle insurance

    o Criminal record check / Vulnerable persons check

☐ Volunteer Driver Interview

☐ Volunteer Driver References

☐ Volunteer Driver Job Description

☐ Volunteer Driver Statement of Understanding

☐ Volunteer Driver Code of Ethics

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- ☐ Oath of confidentiality

- ☐ Orientation check list

- ☐ Volunteer Program Policy Manual

- ☐ Volunteer Driver Handbook

   - o Safe driving guide

   - o Senior sensitivity training

   - o Volunteer feedback loops

   - o Incident reporting

   - o Insurance coverage

   - o First aid and/or CPR

   - o Vehicle maintenance

   - o Alcohol, drug and distraction prevention

- ☐ Volunteer Driver Evaluation

   - o Rider satisfaction survey

   - o Staff feedback

   - o Driver self-assessment

   - o Peer feedback

- ☐ Volunteer driver recognition

- ☐ Exit / re-assignment interview

One of the best resources available today for planning, developing , implementing and evaluating a volunteer driver program is the Beverly Foundation in Albuquerque, New Mexico whose mission is to foster new ideas and options to enhance mobility and transportation for seniors. They provide a comprehensive program planning tool called the *Volunteer Driver Turnkey Kit* at no cost at http://www.beverlyfoundation.org/turnkeykit/index.html .

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Volunteer Driver Risk Management and Insurances

Volunteer Driver programs meet three distinct needs in the community. They:

- provide riders with needed transportation;
- provide drivers with the opportunity to serve their neighbours; and
- supplement transportation services in the community.

Volunteer driving, therefore, adds great value to the lives of citizens. It also poses risks to riders, drivers and the organization that delivers the program. When planning an assisted transportation program, or considering ways to strengthen an existing one, the risk challenges associated with operating the program need to be acknowledged.   No matter what the insurance status of the program, attention must focus on *liability*, *exposure*, and *insurance*.

Liability is the legal obligation (something owed to another) that refers to [ABCD]'s potential responsibility for the actions or inactions of its volunteers, or any potential harm caused by volunteers that can jeopardize the good will and/or assets of [ABCD] or perhaps that of the volunteers.

Providing assisted transportation creates a certain degree of **exposure** to potential liability, regardless of the type of vehicle, the type of driver, or the time or location of the service. Such exposure includes the potential for property damage, bodily harm or potential for abuse to the passenger that may occur in the course of the ride.

The purpose of purchasing **insurance** is to protect the organization against any potential liability issues that may arise out of a loss related to a third party property damage or bodily injury.

Risk Management Practices

Risk management practices, in a volunteer driver program, involve developing a comprehensive risk management protocol. It includes intentional reviews of risk and putting into place appropriate, systematic, day to day operating policies and procedures to manage the risks of exposure and liability. This process allows the organization to determine if they are comfortable assuming the risk or if they are contractually able to transfer the risk to an insurer.

Taking Stock: The Risk Management Process

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Volunteer Driving Program Tool Kit
Risk Management and Insurances

The Insurance Bureau of Canada provides this simple tool that outlines the risk management process. A stakeholder or staffing group can easily walk through it and make decisions on how to proceed with a risk management plan.

Identify what can go wrong.	Look at every part of [ABCD]'s operations and identify where you are exposed to potential losses. Ask yourself: What can go wrong?
Evaluate the risks.	Now that you have a list of what could happen, ask the following questions: Which risks are the most likely to happen and lead to a claim? Which risks could have the greatest financial or reputational impact on [ABCD]?
Examine the possible solutions.	• Create a list of how you can help reduce or eliminate the risks you face. Your options may include the following: ☐ Avoiding the high-risk activity altogether. ☐ Using policies, procedures, or other tools to prevent the loss in the first place. ☐ Accepting the risk and its consequences for [ABCD]. ☐ Finding ways you can reduce the impact on [ABCD] if the loss happens. ☐ Transferring the risk to another party, for example, through insurance, or by contracting another organization to undertake the task.
Decide which option is the best fit for [ABCD].	Look at the list of solutions and determine the best approach in terms of the cost, [ABCD]'s risk tolerance and ability to follow through with implementation.
Implement the chosen option.	Make a clear plan about how the option will be implemented, and how you will get support from [ABCD]'s key stakeholders (the community, members, Board, volunteers, etc.).

www.volunteeralberta.ab.ca/insurance/understanding_policy/

With a risk management plan in place, [ABCD]'s ability to understand and manage risk is strengthened. Policy is now developed on the following elements:

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1. Ensuring reasonable and prudent care of riders.
2. Ensuring reasonable and professional conduct of drivers.
3. Limiting exposure to potential liability.
4. Purchasing insurance to cover potential loss.

1.   Care of Riders

Assisted transportation programs provide services to a vulnerable population. It is incumbent on [ABCD] to ensure that due care is reflected in the mission, value statements and statements of principle of the organization. Establishing codes of conduct for drivers is key to ensuring that the care of the riders is conducted in a safe, respectful, dignified, and professional manner.

2.   Conduct of Drivers

Volunteer recruitment relates directly to risk management. The process requires tools that empower the organization to select only individuals who are capable of performing the driving services without posing a health or safety hazard to the passengers, to the reputation of the organization or to the public. Public safety is a critical component of risk management and the reason volunteer driver programs must include a criminal record check, vulnerable persons check, drivers abstract, verification of a valid driver's license and current insurance, and health and safety questions on applications and in interviews. The behind-the-wheel training, protocol training, supervision and evaluation a driver receives are also building blocks of a risk management program.

Assisted transportation for seniors must also come with clearly defined expectations for riders to protect the organization, the drivers and the public.   The safety and protection of the driver may depend on the behaviour of the rider(s).   Riders entering an assisted transportation program must be informed of the scope and parameters of program delivery and include a code of conduct for riders.

3.   Limit exposure to liability

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Potential liability exposures include property damage, bodily injury or allegations of abuse by the passenger or driver. The goal of a risk management policy is to limit the exposure to liability, through policies and procedures, and compliance to best practices. The stricter the compliance to best practices, the less likely an allegation or incident may occur.

Volunteer Canada shares a risk assessment tool called *Safe Steps; a Volunteer Screening Process* at http://volunteer.ca/files/SafeSteps.pdf

Steps to manage risk in a volunteer program include:

- A job design that identifies values, skills, personal attributes and screening required of a volunteer.
- A job description that matches those values, skills, and attributes and attaches to screening tools.
- Recruitment messages that appeal to the values, personal skills and attributes of a prospect volunteer and that are a requirement for the program.
- An application that pre-screens people in, or out, as a volunteer using those values, skills, attributes and safety checks.
- An interview that informs a candidate of the values, skills, attributes and screening procedures required for the role, and ensures there is a match to the role.
- Follow up background and reference checks to ensure that what is being said in an interview is consistent with known behaviour.
- Medical/physical exams where appropriate, and for drivers over 75 years of age.
- A Statement of Understanding between [ABCD] and the volunteer that clearly defines the values, service delivery, code of conduct, and expectations of the program.
- An Oath of Confidentiality based on Privacy Legislation that protects the privacy of the rider and confidentiality of their involvement.
- A Code of Ethics that clearly states program values and guides driver conduct.
- A volunteer orientation that offers the opportunity to ensure all aspects of screening on an orientation check list are covered. The check list acts as a record that there has been compliance to the screening and orientation. A "ride along" by someone from the organization prior to engaging the services of the volunteer is recommended.

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- Policies that foster accountability to protocols inform the volunteer driver about program expectations and provide structure for reporting, supervision and evaluation.
- Volunteer driver training which ensures the competencies for service delivery are taught and records are kept to verify all training for each volunteer.
- Supervision and evaluation tools that are based on the values, codes of conduct, skills, attributes and screening checks expected for the volunteer as well as their ability to adhere to organizational policies and procedures.
- Consistent records management that ensures that if there is a risk management challenge to the volunteer driver program, proven standards of practice are being implemented, recorded and safely stored as a point of reference.

4.   Insurances

Even with a sound risk management plan in place, there is a risk that property damage or personal injury can occur in an assisted transportation program. The purpose of buying insurance is to be able to investigate, and if necessary defend, against losses related to property damage or bodily injury of third parties.

When seeking insurance, non-profit organizations may be considered in the same category as for-profit corporations for commercial insurance. Insurance can be expensive but must be factored into the overall operations budget of [ABCD] and the volunteer driver program. Insurance must be carried by both the volunteer driver and the organization. It is a requirement of the organization to have proof of valid insurance from the volunteer driver. A current record must be maintained in the driver's file along with a copy of their valid driver's license.

Insurance Policy

An insurance policy is a legal contract between [ABCD] (the insured) and your insurance company (the insurer). The policy details the specific types of coverage that is included. Different insurance covers different business exposures. For example, losing your office to a fire requires different coverage than being sued by someone who hurts themselves on your premises.

Premium

A premium is the money the organization pays to the insurance company in exchange for insurance coverage.

Deductible

A deductible is the amount [ABCD] has to pay should there be a claim against insurance coverage. The deductible can be paid directly to a third party contractor (for example, a body shop) or may be deducted from a final payment from the insurer. It is an insurance industry norm that the higher the deductible, the lower the premium.

Exclusion

All policies contain exclusions that outline exposures that are not covered. It is possible to add coverage for some of these exclusions back onto your policy through separate endorsements. However, there are some risks that cannot be insured, and must be assumed by the organization as the cost of doing business.

Endorsement

An endorsement is a form that allows you to amend the coverage provided by your policy. This is also referred to as a *rider* or *amendment*.

Liability Insurance Non-profits Should Consider

Adapted from Imagine Canada 2008, Insurance & Liability Resource Center for Non-profits

Policy	Claims Example
Commercial General Liability	
Coverage A: Bodily Injury and Property Damage	A client trips and falls on a wet floor during [ABCD] activity.
Coverage B: Personal Injury	A third party sues the insured alleging he was slandered.
Coverage C: Medical Payments (no lawsuit)	Senior falls during recreation at senior center and has two teeth knocked out.
Coverage D: Tenants Legal Liability	Water damage destroys landlord's flooring and he sues.

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Endorsements such as Non-Owned Automobile Liability	Volunteer driving for [ABCD] is involved in an accident and his insurance coverage is insufficient; [ABCD]'s non-owned auto coverage will respond if they are named in a law suit.
Directors' & Officers' Liability	An allegation is made that management or the board of directors, mismanaged [ABCD]'s funds.
Employment Practices Liability	Wrongful dismissal suits.
Professional Liability (Errors and Omissions)	Senior Abuse Help Line example: volunteer crisis worker offers support and counsel but it is not heeded by the caller; the caller commits an assault and the family sues the volunteer and [ABCD].
Employers Liability	In the event [ABCD] does not carry WCB and an employee gets injured on the job, the employee sues [ABCD] for compensation.
Abuse Liability	An abuse is alleged and, true or not, must be defended.
Liquor Liability	At an [ABCD] event, alcohol is served and results in a collision. Separate coverage for individual events is available.
Special Events Liability	Separate policy that covers [ABCD]'s third party bodily injury and property damage exposures.

Remember, this information is to be used as a *guide only*. Consult with an insurance broker or agent about the specific needs of [ABCD] and/or to have any of these policies explained. Some insurers have combinations of these policies or may have new coverage.

Driver Owned Insurance
When a volunteer driver provides transportation in his or her vehicle, the insurance policy for that vehicle will be the first to respond in the event of an accident. The volunteer driver will be responsible for paying any deductible.

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In volunteer driver programs in Alberta, volunteers are required to carry a minimum of $1 million liability coverage. It is prudent that the driver advise his/her broker that they will be participating in the volunteer driver program. Volunteers may be encouraged to carry a $2 million limit on their policy.   It would not be unusual, for example, for a $1 million limit to be exhausted in the event of a bodily injury claim.

Organization Owned Insurance

To determine what insurance is the most appropriate for [ABCD], a consultation with an insurance broker experienced in the non-profit sector is highly recommended. With an understanding of the sector, the broker can determine the coverage options and insurers that would be the best fit for [ABCD]'s exposures. Part of the broker's job is to explain the coverage available, and ensure that [ABCD] understands any risks that are not insured, either because of the cost associated with the coverage, or because the coverage is not available. The more concise [ABCD]'s risk management plan, the easier it will be for the broker to find the right coverage and ensure the most competitive pricing.

Commercial or Comprehensive General Liability

General liability coverage protects [ABCD] against third party legal liability related to property damage or bodily harm. This can include coverage for damage to rented property or injuries sustained as a result of [ABCD] programs.

General liability automatically covers the organization, its employees and volunteers while they are acting within the scope of their duties. It is imperative that [ABCD] ensure volunteers are included under the definition of insured. This will provide volunteers with the same protection as employees while operating in the scope of their duties.

Directors and Officers Liability Insurance

The Board of Directors have fiduciary and governance responsibility for an organization. It is common for board members to want to cover their personal liability when in the role of a director. Directors and Officers Liability Insurance (D&O) covers against risks that are not included under [ABCD]'s general liability policy, such as:

- claims arising out of Board decisions or omissions
- actions performed in their capacity as Board members.

[ABCD]'s decision to buy Directors and Officers insurance may have a positive influence on those who put their name forward to sit on the Board.

Directors and Officers policies are usually issued on a *claims-made* basis. They do not cover bodily injury or property damage as this is covered by [ABCD]'s Commercial General Liability coverage.   For example, if someone slips in the lobby of a building [ABCD] owns, general liability would respond to any claims made.

Claims-made versus Occurrence Liability Policies

Claims-made: Claims-made policies provide coverage for claims submitted during the policy term, even if the incident leading to the claim was before the policy was in place. However, insurance companies often add a retroactive clause so the policy will only cover claims stemming from incidents that happen while the policy is active, not claims based on incidents that took place before the policy was in place.

Occurrence: Occurrence based policies provide coverage for incidents occurring during the time the policy is in effect, even if the claim is years later and the policy is no longer active.

Depending on your insurance company, liability policies such as Directors and Officers (D&O), abuse coverage, and professional liability may be issued on a claims-made or occurrence basis.

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Non-owned Automobile Endorsement

[ABCD] cannot insure a vehicle it does not own, but can be brought into a claim if an employee, volunteer, or Board member is driving a non-owned vehicle on company business. [ABCD]'s non-owned automobile coverage will respond to protect [ABCD]'s interest if the organization is named in a suit as a result of an accident. This is important coverage for all organizations to have and can be added for a reasonable cost.

Employee and Volunteer Use of Personal Vehicles

Employees should advise their insurance companies if they use their personal vehicle for business purposes and provide [ABCD] with confirmation that this has been done. Volunteers using their vehicles as part of the volunteer driver program should advise their broker. It is important that the broker is made aware that the volunteer is <u>not</u> being compensated for the use of their vehicle.

Abuse Coverage (including physical, sexual, verbal and other types of abuse)

Most general liability policies specifically exclude abuse coverage. It is prudent that organizations working with vulnerable populations such as children, the elderly or the disabled obtain abuse coverage. This may be added as an endorsement to a general liability policy or may be issued as a separate policy. Only a small number of insurers in Canada offer abuse coverage and it is carefully underwritten. A broker that is well versed in the non-profit sector can help advise the process.

Conclusion

It is impossible to eliminate all the potential risks connected to [ABCD]'s program operations. The rationale for putting into place appropriate, systematic, day to day operating policies and procedures to manage the risks of exposure and liability, and to purchase the appropriate insurances, is to protect [ABCD] and its people to the best of its abilities.

Buying insurance do's and don'ts can be found on Imagine Canada's website at
http://nonprofitrisk.imaginecanada.ca/node/673

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Volunteer Driver Competencies

Recruiting and maintaining a pool of compassionate, qualified and motivated drivers is essential to the success of any volunteer driver program. Volunteer drivers, and the way in which they perform their duties, will influence the opinion the community has on [ABCD], for better or for worse. Riders are entitled to good service and performance, even if the service comes at minimal or no cost. A volunteer driver not only requires driving skills, but well developed interpersonal skills. Both sets of skills should be reflected in the volunteer position from application to exit interview, and must be considered requirements for the role.

Requirements for the role:
Drivers must have the following skills and qualifications:
- be 21 years of age or older
- have at minimum five years of driving experience
- have a good driving record
- hold a valid driver's license, registration and insurance
- own a trustworthy vehicle
- be responsible for the upkeep and safety of the vehicle
- be in good physical and mental health
- be physically able to assist riders should it be required
- willingness to drive without distractions (cell phone, texting, ear pods, eating while driving)
- able to consistently drive defensively and obey traffic laws
- be skilled at maps and logistics

Drivers must have the following personal attributes and qualities:
- empathy, compassion and a non-judgemental approach with elders
- kindness and patience with a pace different from one's own
- supportive listening skills
- reliability and punctuality
- able to take direction from the Manager of the Volunteer Driver Program
- flexibility and adaptability to emergency situations
- willingness to help make a difference in a senior's life

Drivers must be willing to respect and observe [ABCD]'s policies, procedures, codes of conduct and ethics.

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Volunteer Driver Job Description Sample

Volunteer driver position objectives:

- to improve the quality of life for seniors with mobility challenges who are unable to take other forms of transportation
- to decrease the social isolation of a senior and enhance their independence and quality of life

Reporting to the Manager of the Volunteer Driver Program, volunteer drivers provide assisted transportation for seniors with mobility challenges in the Edmonton area. This position requires solid driving skills, and well developed interpersonal skills.

Duties and responsibilities include:

- Transporting riders from their homes to their chosen destinations
- Providing assistance to riders as needed.
- Driving defensively and responsibly, obeying all traffic and seat belt laws.
- Reporting any incidences and emergencies immediately
- Calling in if unable to make it for a scheduled shift
- Keeping accurate records and submitting the required reports
- Attending all required orientations and training
- Treating all riders with dignity and respect

The position requires the following qualifications:

- be 21 years of age or older
- have at minimum five years of driving experience
- hold a good driving record
- hold a valid driver's license, registration and insurance
- own a trustworthy vehicle
- be responsible for the upkeep and safety of the vehicle
- be in good physical and mental health
- be physically able to assist riders should it be required
- be willing to drive without distractions (cell phone, texting, eating while driving)
- able to consistently drive defensively and obey traffic laws
- be skilled at maps and logistics

Drivers must have the following qualities:

- empathy, compassion and a non-judgemental approach with people
- kindness and patience with a pace different from one's own
- supportive listening skills
- reliability and punctuality
- flexibility and adaptability to emergency situations
- willingness to help make a difference in a senior's life

Position requirements:

- Volunteer drivers will respect and comply with the organizations policies, procedures, codes of conduct and ethics.
- Volunteers will abide by an oath of confidentiality related to client information.
- Volunteer drivers will be able to take direction from the Manager of the Volunteer Program or designate.
- Volunteers must have access to a phone.
- Volunteers commit to one 4 hour shift per week to be negotiated with the Manager of the Volunteer Driver Program. Alternate shifts are negotiable.

Volunteer Driver Recruitment

The recruitment of volunteers is a targeted marketing exercise in which the basic principles of marketing apply. Identifying target audiences, and volunteer motivators (see Volunteer Management Resource #4 and 5) leads to the development of key messages, and how your organization can make the best use of it communications tools.

Often in organizations, recruitment is most effective by word-of-mouth, as it is often about linking relationships. Informal approaches to volunteer recruitment are cost effective and efficient. They may include:

- Word of mouth by your organization's board, staff, volunteers and client base
- Use of your organization's website
- Links on partner organizations' websites
- Messages in your organization's newsletter or e-news
- Ensuring your organization and its services are registered with 211 and that your volunteer opportunities are listed and can be referred
- Tours of the organization
- Media interviews or articles on seniors' issues
- Presentations to service clubs and community groups
- Specific presentations to senior serving organizations
- PSA's on radio or television
- Social networking
- Information booth at fairs sponsored by Volunteer Edmonton or Volunteer Alberta or at corporate volunteer fairs

Some of your volunteer program's best recruiters will be volunteer drivers themselves. There are a variety of ways in which they can do this:
- Sharing their stories and experiences can inspire others
- Providing testimonials for newsletters, e-news, website and Annual Report
- Developing peer-to-peer support systems to enhance the services they provide
- Providing a prospect volunteer with a ride-along
- Assisting volunteer program staff with recruitment ideas and support at events

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- Acting as ambassadors for the program when out and about in their personal lives
- Helping orient and train new volunteers
- Asking people they know if they are interested in volunteering

Setting recruitment goals and developing messaging

Setting recruitment goals sets targets for your volunteer driver program, as well as puts in place the framework for developing key messages for your driver recruiting.

Some sample recruitment goals are to:

- Provide transportation to seniors who are no longer able to drive.
- Enable seniors to make use of a wide range of community resources that empower them to age with dignity, safety and security.
- Recruit drivers who are caring, committed and respond with respect and compassion.
- Recruit drivers that reflect the diversity of our community.
- Increase our availability to seniors by expanding our hours or availability.

Knowing the goals of your program helps create recruitment messages that are consistent with your goals and reporting.

Who are the volunteer drivers?

Volunteers who will commit to driving may come from a wide variety of sources, but most enjoy driving and love helping people. It would be helpful if we could put a note on a recruitment message that says "those who hate driving and hate people need not apply", however it is the volunteer program's responsibility to screen applicants, and a solid application form can do just that.

Likely volunteer driver prospects:
- Friends of your organization, Board, staff, volunteer drivers or the riders are a great source of driver prospects.
- Those who are already active in volunteering in the community, and/or deliver meals on wheels and other like services.

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- Active retirees who are interested in volunteerism. They may come from a professional background and are trained caregivers: retired nurses, teachers, caregivers, social workers.
- Those who come from a background that includes driving: truck drivers, chauffeurs, bus or shuttle drivers, travelling sales people, real estate agents.
- Members of service clubs, seniors' centres or veterans' clubs.
- Employed people who work flex shifts or times and are available for driving; seasonal workers; part time employees.
- People who enjoy the company of seniors and/or may have had an elderly relative who used the program.
- Those in faith communities who have a strong commitment to helping others.

Where to recruit volunteer drivers

Many organizations recruit their volunteer drivers where they can find active retirees. They find that this pool of volunteers has many of the qualities and competencies required for the role. Find volunteer driver prospects at:

- Seniors' centres
- Senior serving organizations
- Corporate retirement clubs
- Senior clubs
- Churches and faith communities
- Adult education classes
- Community events

- Service clubs
- Coffee shops
- Retirement communities
- Seniors' complexes
- Chamber of Commerce
- Golf courses

Recruitment messaging

Recruitment messaging should appeal to the motivations of the prospect driver and what [ABCD] is hoping to accomplish. The messages will reflect:

- what need you are filling,
- what difference it makes in the lives of riders, and
- what they can benefit from being involved.

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Messages about the need you are filling may reflect the mission of [ABCD] or the purpose of the driving program: "to serve seniors so that they can age in their communities with a sense of independence, and feel safe and secure".

Messages about the difference it makes in the lives of riders can be general, or as personal as testimonials. A general message, for example, is "whether for access to services or for socialization, mobility is critical to the quality of life, well-being and peace of mind of seniors. Transportation, therefore, is key to reducing social isolation whether seniors are ageing in their homes, or in assisted living". A personal testimonial from a senior, and the impact of having access to assisted transportation to connect them to their community is a very effective recruitment message. Volunteers want to know that they are making a difference in someone's life.

Showcasing the benefits to the volunteer driver in a recruitment campaign is a good way of telling them what is in it for them. The benefits may include:
- feeling good about helping others
- an opportunity to network
- building new friendships
- an opportunity to get involved in other aspects of the organization or the community
- learning new skills
- meeting new people
- feeling valued
- making a difference in someone's life
- helping make the community a better place to live.

Whether recruitment messages reflect the community need, the program's goals, the riders' benefits, or the volunteer benefits, they need to be clear, present a call to action, and give the volunteer prospect the information they need to contact [ABCD] to get involved.

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This application is used to establish your eligibility as a volunteer driver for [ABCD]. The information you provide helps us assure you, this organization, and the public that the highest standards of safety and accountability are maintained. We appreciate your cooperation and interest in our volunteer driver program. Return completed application to: [ABCD Volunteer Driver Coordinator [phone, e-mail]

Name:	Phone:
Address:	Fax:
City / PC:	E-Mail:
	Cell:
Work Address:	Job Title:
Supervisor:	Wk. Phone:
Supervisor's phone:	Wk. E-mail:

Preferred method of communication:
- ☐ Home phone
- ☐ Cell
- ☐ E-mail
- ☐ Work phone

Best time to call: _____

Notify in case of emergency:

Name:	Phone:
Relationship to self:	Cell:
	Work phone:

How did you hear about the ABCD volunteer driver program?
_____

Do you speak other languages other than English? If yes, which ones?
_____

Do you have any previous volunteer driving experience? If yes, please describe.

_____

Please list your hobbies, skill and special interests that may contribute to your role.

_____

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Volunteer Driver Availability

Please check the boxes for the days of the week and times of day you are interested in driving.

Week Day	Morning	Afternoon	Evening	Flexible	Comments
Monday					
Tuesday					
Wednesday					
Thursday					
Friday					
Saturday					
Sunday					

Most shifts will take two to four hours of your time. Your volunteer shift includes two one-way trips; one from the rider's residence to a destination, and a return trip. You are only required to give riders the ride(s) they originally scheduled.

How many round trips per week are you willing to provide? _____Hours per week? _____

Service Area

Which of the following communities are you willing to transport riders to / from ?

- ☐ Edmonton Northwest
- ☐ Edmonton Southwest
- ☐ Edmonton Northeast
- ☐ Edmonton Southeast
- ☐ Edmonton North
- ☐ Edmonton South
- ☐ Others: (please list) _____

Would you be willing to drive outside of these boundaries occasionally?   ☐ yes   ☐ no

Driving Record

Do you have a current and valid Alberta Driver's License?
☐ Yes   (please attach a copy of both sides)
☐ No
Driver's Licence Number: Expiry Date:

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How long have you had a driver's license?   Years: Months:
If licensed in Alberta for less than five years, list licenses previously issued: *License number / Province*
Are there any restriction on your driver's license?   *If restricted, state type:*
Have you ever had your driver's license suspended, revoked, or refused?   ☐   Yes   *If yes, please explain:*   ☐   No
Do you have a current and valid vehicle registration?   ☐   Yes   (please attach a copy)   ☐   No
Name of your automobile insurance company: *Please attach a copy of your insurance.*
Has an insurance company ever refused, cancelled, non-renewed or given notice of intention to non-renew your automobile insurance?   ☐   No   ☐   Yes, cancelled   ☐   Yes, non-renewal   ☐   Yes, refused   *If yes, please explain and list company, agent name and phone:*   *Date: Reason:*

Have you been convicted during the last 10 years of driving while intoxicated or under the influence of drugs?   ☐   Yes   ☐   No   *If yes, please explain (date, charge, jurisdiction)*
Have you had any traffic violations in the past 3 years?   ☐   Yes   ☐   No   *If yes, please give full details, including dates*

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Have you had any type of motor vehicle accident in the last 5 years?
- ☐ Yes
- ☐ No

If yes, please describe fault, date, damage to vehicle, property, injury, etc.

For drivers

This application warrants a criminal record check, and a verification of my motor vehicle record as authorized by my signature below.

Access to driving record
My signature below authorizes [ABCD] to obtain, at its sole discretion, my employment and non-employment driving record, including all actions that have taken place regarding the driver's license I now hold, have held, or in the future may obtain.

Criminal Record Check
My signature also authorizes [ABCD] to conduct a criminal record check including a vulnerable persons check.

I further agree to any other conditions described herein. This release continues in effect as long as I continue to serve [ABCD] as a volunteer driver.

Signature:	Date:

Thank you for your interest in being a volunteer driver for [ABCD]. We will respond to your application within a week. Applications that are accepted lead to an interview which will be scheduled at your convenience.

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Volunteer Driver Interview Sample

The questions in this interview are not exhaustive, but give examples of ways to access information about driver competencies, attitudes, and interpersonal skills. The interview must not violate a person's human rights; questions must be related directly to the competencies and interpersonal skills required for the role. The questions must be able to screen prospect volunteers <u>in or out</u> of the volunteer role, and must consider the safety and security of the rider at all times.

Date:
Volunteer Name:
Interviewer:

(Interviewer: Thank you for coming in today. I hope you found the parking you need—the interview will take about one hour. We will be asking you questions related to this role, and know that what you tell us will be held in confidence.)

Tell me a little bit about what you know about ABCD. (mission, programs, services)

Can you tell me what your understanding is of this role? (clarify volunteer role)

Do you have any previous volunteer driving experience? Explain.

Tell me about what motivates you to volunteer in this role. (cues for match and volunteer recognition)

What do you think you would like most about this volunteer role?

What do you think would be the most challenging about this volunteer role?

Have you had any driving violations in the past 3 years?

Have you been involved in any motor vehicle accidents in the last 5 years? (more info if yes)

Can you tell me about a time when you had a conflict with another driver? How did you resolve it?

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Describe for me a time when you had to help a friend with a problem. How did you approach it? (looking to assess helping style / is it empowering?)

What qualities do you like best in a supervisor?

(The next few questions are personal in nature. I just want to remind you that the interview is confidential. The reason we ask these questions is to ensure that client care is foremost, and our volunteers are prepared to care for the client and for themselves.)

Do you have any personal experience working or volunteering with seniors?

How would you describe your approach with seniors?

Can you tell me how you would handle an emergency, should one occur?

I am going to read a statement. Tell me how you feel about the statement.

- Seniors are our elders and each senior deserves to be treated with dignity and respect.

This driver role helps eliminate isolation for seniors. The rides come at minimum or no cost to seniors. How would you feel about informing the rider about how to make a donation to [ABCD]?

Where do you think you might need the most support and training for this role?

How would you feel if you were not a successful candidate for this role?

Is there anything you would like to ask of us?

Do you have references?

Do they know we will be calling them about this role?

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Volunteer Driver Background Check

A part of [ABCD]'s risk management plan is to include a volunteer background check in the screening process. The background check ensures that:

- the volunteer holds a motor vehicle driver's license
- the volunteer's driver abstract is checked
- there is proof of valid vehicle registration
- there is proof of valid vehicle insurance
- a criminal record check and vulnerable persons check are conducted
- reference checks are conducted post interview

Volunteer Police Information Check Program

The Volunteer Police Information Check Program is a three-year pilot launched in April 2009 and is funded by the Government of Alberta and jointly administered by Alberta Culture and Community Spirit and Volunteer Alberta. The program supports the Alberta government's goal of building strong communities where Albertans feel safe and secure. Under this program, eligible non-profit organizations can have police information check costs (from police services) covered for eligible volunteers. This reduces administrative costs for the non-profit, enabling organizations to direct more funding to front-line services to assist Albertans.

To obtain this, organizations apply for a Voluntary Organization Authorization Number (VOAN) through Volunteer Alberta who is administering the program.
http://www.volunteeralberta.ab.ca/contactus.php

Reference Checks

After an interview, following up on a volunteer driver's references will help link the information you are hearing from the prospect, with information from people they know. Find a sample reference check form below.

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Volunteer Driver Program Took Kit
Volunteer Driver Background Check

Name of volunteer applicant: _____

Name of reference:_____ Phone: _____

[Applicant] has offered to become a volunteer driver for [ABCD]'s assisted transportation program. This program provides rides to seniors who have mobility challenges and need assistance. [Applicant] has brought your name forward as a reference. Thank you for taking the time to do this for us.

1. What is the nature of the relationship with this applicant? (check all that apply)

   ☐ employer   ☐ family friend   ☐ relative
   ☐ friend   ☐ counselor   ☐ coworker
   ☐ neighbor   ☐ teacher   ☐ other _____

2. How long have you known the applicant? _____

3. How well do you know this person?   very well _____   fairly well _____ acquaintance _____

4. As a volunteer, he/she will be required to maintain client confidentiality. In your experience, how is the candidate with confidential information?

5. How would you describe this person's style with people? (check all that apply)
   ☐ sincere   ☐ demanding   ☐ indifferent
   ☐ shy   ☐ caring   ☐ nurturing
   ☐ gentle   ☐ consistent   ☐ patient
   ☐ distant   ☐ accepting   ☐ don't know
   ☐ warm   ☐ judgmental   ☐ other_____

6. Do you feel the applicant would be compassionate and caring to the following populations?
   (Check all those that you feel would apply)
   ☐ mentally challenged   ☐ low income
   ☐ physically challenged   ☐ elderly
   ☐ behaviorally challenged   ☐ non-English speaking

7. Would you trust the applicant with your senior parent or a senior close to you?

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☐ Yes
☐ No   If no, please explain:

8. Check as many of the following that describe the applicant:

☐ confident   ☐ responsible   ☐ unreliable
☐ nervous/tense   ☐ temperamental   ☐ flexible
☐ outgoing   ☐ judgmental   ☐ other _____
☐ sense of humor   ☐ friendly

9. Does this person deal well with the responsibilities and challenges of everyday living?
☐ almost always   ☐ sometimes
☐ usually   ☐ rarely

10. In your experience as a passenger in the applicant's vehicle, have you found him/her to be a safe and cautious driver?   ☐ yes ☐ no   Please explain.

11. How would you rate this person's health?
☐ excellent   ☐ fair
☐ good   ☐ poor

12. Please describe this person's strengths and weaknesses:
     Strengths:

     Weaknesses:

13. Do you know any reason why this applicant would not serve well as a volunteer driver?

If you have any additional information or comments about this applicant that you would like to share with us, please fell free to call at: _____ Ask for: _____
Thank you for helping us to determine whether this candidate would be a suitable driver for our volunteer program.

Signature of caller: _____**Date:** _____

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Volunteer Driver Qualification

Volunteer drivers providing assisted transportation are helping some of our most vulnerable citizens. It is critical that when choosing drivers, there are clear methods of qualifying, and disqualifying prospect volunteers. The safety and security of clients receiving services relies on the proper matching of volunteers to the driver position.

From information gathered through phone calls, e-mails, the application process, interview, reference checks and other screening processes, [ABCD] will want to rate the volunteer to determine suitability for the driver role. Following is an example of a rating tool.

Driver Selection Checklist

Please rate a prospect volunteer using the following ratings:

- 0 = not acceptable for the position
- 2 = below expectation
- 3 = barely meets expectations
- 4 = meets minimum expectations
- 5 = exceeds all expectations
- 6 = outstanding candidate

Overall Rating: _____

Qualifications	Rating	Interview Comments
Driving Experience		
Previous volunteer experience		
Has worked with seniors		
Personable		
Interpersonal communications		
Knowledge of the role		
Reliability		
Availability		

If the candidate meets the selection requirements, please ensure the following steps are completed:

- ☐ Interviewed by: _____Date: _____
- ☐ Copy of the Driver's License on file (front and back)
- ☐ Check Driver's Abstract; driving record meets criteria

☐ Reference checks are completed and approved

☐ Passed road test

     ○ Tester: _____ Date: _____

☐ Required orientation completed

☐ Required training completed

☐ Approved by: _____Date: _____

Volunteer Driver Disqualification

As the job description helps qualify a volunteer, the form above helps make the difficult decision of disqualifying a driver. It helps provide complete, objective documentation of any disqualified applicants. Your volunteer program manager must be able to objectively defend decisions if ever challenged.

Reasons for disqualifying a potential volunteer driver include, but are not limited to:

1. A volunteer prospect does not meet expectations on the selection checklist.
2. A volunteer prospect not being in possession of:
   a. A valid driver's license
   b. A safe vehicle (if the driver program involves owner operated vehicles)
   c. Valid registration
   d. Valid insurance
3. A volunteer prospect has a criminal history or vulnerable person check that is not clear.
4. A volunteer prospect has an unsafe driving record.
5. A volunteer prospect cannot read or comprehend written materials including policies, procedures and road maps.
6. A volunteer prospect has physical restrictions that prevent the safe and proper assistance to riders based on essential job functions listed in the job description.
7. A volunteer prospect is unwilling to sign off on required documentation.
8. A volunteer prospect is unwilling to perform essential job functions or requirements.
9. A volunteer prospect reports to an interview, orientation or training under the influence of a controlled substance, alcohol or medications that affect driving abilities.
10. A volunteer prospect fails to meet the expected results in training.
11. A volunteer prospect will not comply to organizational or volunteer program policies and procedures.

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On behalf of [ABCD], we would like to welcome you to the volunteer driver program. With your commitment, we can help reduce isolation and provide independence for seniors in need of assisted transportation, help them stay in their home and community and enhance their quality of life. Please read the statements below, and if you agree, sign and date this Statement of Understanding at the bottom of the form.

Statement of Understanding for Volunteer Drivers

I represent that my vehicle is mechanically sound and is equipped with seat belts, which I will use and require my riders to use.

I understand that my personal automobile insurance is my primary liability protection while driving for [ABCD]'s Volunteer Driver Program. I will immediately notify the Manager of the Volunteer Driver Program if my personal insurance is revoked, cancelled or altered in such a way that I no longer meet the minimum insurance requirements for the Province of Alberta.

I hereby represent that I am physically capable of driving my vehicle in a safe and responsible manner. I will not use alcoholic beverages or mood altering drugs, including over the counter medications, while serving as a volunteer driver. I will not accept these substances from riders.

I will conduct myself with dignity, courtesy, and consideration. I will be friendly, polite and respectful when serving riders.

I will assist the rider to and from, in and out of the vehicle and buildings as is appropriate.

I will provide good client service and treat my volunteer work with the same respect I would a paid position.

I will maintain a clean and neat appearance and visibly display my [ABCD] volunteer identification provided by [ABCD] during my shift.

I understand I must respect the privacy and confidentiality of the riders that I serve. If I have any concerns about the rider, I will refer him/her to [ABCD] staff rather than intervene on

my own. I will limit the distribution of confidential information to only those staff with a legitimate need in the performance of the [ABCD]'s mission.

I will not accept or solicit money or tips, personal items or loans from my riders or request that my meals be paid for by my riders. I will not accept cheques for cashing, sign documents or arrange to buy or sell anything that belongs to a rider. Any donations a rider wishes to make to [ABCD] will be mailed directly to [ABCD] by the rider.

In the performance of my volunteer duties, I will avoid actual, perceived and potential conflicts of interest that might compromise [ABCD]'s integrity or reputation. I will not witness legal documents or legally represent a rider or a member of their family as Power of Attorney.

I will be reliable and punctual in the performance of my duties.

I will not make discriminatory or derogatory remarks to or about riders based on race, creed, religion, national origin, gender, disability, age, marital status, sexual orientation or status with regard to public assistance.

I will not impose my religious beliefs on riders.

I understand that sexual remarks, harassment or contact with riders is inappropriate and grounds for dismissal.

I will not use my cell phone, text, wear headphones, or eat and consume beverages while driving.

I will not smoke in the vehicle nor allow a rider(s) or a rider's companion to smoke.

I will not accept responsibility for any rider's personal items.

I will notify the Manager of the Volunteer Driver Program immediately if I am involved in a motor vehicle collision, or receive a traffic citation that affects my driving record. I understand that failure to maintain a satisfactory driving record may result in my termination as an [ABCD] volunteer driver.

I understand that as a volunteer driver, I am representing [ABCD]. I have a responsibility to [ABCD], to those who direct my work, to the riders and to the public to uphold this Statement of Understanding.

I will notify [ABCD] at the time I no longer wish to be involved as a volunteer driver. Either [ABCD] or I may terminate this agreement at any time.

I have read and understand the above statements of understanding.

Volunteer signature:

Date:

Signature of witness:

Role:

Date:

Volunteer Driver Code of Ethics Sample

This Code of Ethics governs the performance of [ABCD]'s Volunteer Driver Program volunteers. It is an expectation that all volunteers will adhere to this Code of Ethics. Violation of these policies will lead to disciplinary action as determined by the Manager of the Volunteer Driver Program and the Executive Director of [ABCD].

- Adherence to Traffic Laws: A driver will adhere to all traffic safety laws and limits of speed while transporting a rider. The driver will transport the rider in a safe, reliable and responsible manner. In case of emergency, the driver will follow [ABCD]'s protocols for reporting and actions.
- Confidentiality of information: A driver will read, sign and comply with [ABCD]'s Oath of Confidentiality. Confidential information provided by riders will not be shared unless that information needs to be reported to the Manager of the Volunteer Program such as senior abuse, child abuse or other crimes for which [ABCD] has a legal obligation to report.
- Receipt of Gifts: A driver will not accept gratuities, favours, gifts or anything of monetary value from a rider including donations for [ABCD].
- False claims: A driver will not make any false, fictitious or fraudulent claims to a rider, to [ABCD] or to the community.
- Rider Abuse: A driver will not, at any time, take actions towards a rider that constitute abuse. Those actions include:
    - Taking advantage of or exploitation of a rider,
    - Verbally or physically abuse of the rider
    - Sexual harassment or abuse
    - Neglect of the rider
    - Abandonment of the rider
    - Theft from a rider
- Substance Abuse: A driver will refrain from smoking in the vehicle while transporting riders. At no time will the use of alcohol, narcotics, controlled or over the counter substances that affect driving performance be allowed while driving. A driver will also not solicit or accept such substances from riders.

I, the undersigned, hereby agree to abide by [ABCD]'s Code of Ethics and safeguard that trust.

Volunteer: _____ Date: _____

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Volunteer Driver Oath of Confidentiality Sample

Policy

All staff and volunteers of [ABCD] have a set of ethical responsibilities by which they are bound to the rider, the community and themselves. The principle of confidentiality is basic to the maintenance of professional ethics and community respect.

The [ABCD] riders act in good faith, expecting their circumstances and personal matters to remain confidential. [ABCD] is obligated to reciprocate. Confidentiality of the rider information is maintained for the protection of the rider and for [ABCD].

All staff and volunteers will take responsibility for protecting the confidentiality of riders and their personal information.

All written and unwritten information about riders of [ABCD] are considered confidential.

All written information about riders of [ABCD] will be maintained in files in locking file cabinets.

New staff and volunteers will receive instruction on these confidentiality procedures.

Oath of Confidentiality

Whereas, I understand that any information about riders secured by me, or available to me, in the pursuit of my duties at [ABCD] is of a confidential nature and must not be divulged except as required by specific [ABCD] policy;

Whereas, I know as a condition of my involvement that I am to maintain the confidentiality of riders of [ABCD];

I, the undersigned, hereby agree to the confidentiality of [ABCD]'s riders and take all reasonable precautions to safeguard that trust.

Volunteer:_____   Witness: _____

Date:_____   Date:_____

Volunteer Driver Orientation

Part of a risk management plan is a thorough volunteer orientation. Before volunteer drivers start transporting riders, you want them to know as much about [ABCD], its culture and climate as possible. It is important to share any information that will help them understand their role, [ABCD] policies and procedures, and [ABCD]'s client base.

Orientation check list

General information about [ABCD]

☐ Organizational backgrounder with history, vision, mission
☐ Annual Reports
☐ Website
☐ Newsletters
☐ Promotional materials for programs and services
☐ A tour of programs and services that includes some client stories

Volunteer Program orientation essentials

☐ Volunteer Program manual that includes:
  o All policies and procedures related to the role
  o Duties and responsibilities of volunteer drivers
  o Orientation, guidelines and logistics that are role specific
  o Safe driving guide
  o Insurance coverages
  o Contact information for volunteer drivers
  o Vehicle maintenance and inspection check lists
  o Emergency response procedures
  o Principles of good communication
  o Sensitivity tips
  o Training requirements
  o Sample forms required for the role

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Volunteer Driver Training

The quality of service [ABCD] can provide and access to insurance depends on the driver's ability to effectively interact with the community and safely operate a vehicle. For example, if there is an accident, the insurer may want to know if the volunteer driver program has been providing training to drivers.

Training volunteer drivers, therefore, is an important element that contributes to the satisfaction of their experience, client satisfaction and organizational accountability. Training includes the essential elements for the role, as well as in-services and continuing education that enhance the role of the volunteer, and provide them with the skills to improve the service they provide to riders.

Training Essentials

Training pieces that are essential to the volunteer driver skills enhancement include:

- Safe driving and safe driving conduct
- Defensive driving
- Emergency response, First Aid and CPR
- Client service, boundaries and sensitivity education (senior and multicultural sensitivity)
- Training required for any special vehicles
- Vehicle operation and maintenance
- Logistics and mapping
- Organizational protocols and procedures
- Infection control
- Abuse prevention (neglect, abandonment and exploitation prevention)

The following topics are additional relevant training options for volunteer drivers:

- Communication skills (supportive listening)
- Recognizing signs of abuse and legal obligations to report suspected abuse
- Providing physical assistance (ambulation, assistance with walkers)
- Cognitive and physical impairments
- Safety

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- Preventing and dealing with agitation
- Body mechanics
- Helpful products and resources
- American Sign Language (ASL)

A requirement for all drivers providing assisted transportation to have specific training related to the role is good risk management practice, as well as personal development and of interest to the volunteer. Training for volunteers must be structured to conform to the duties and responsibilities listed in the job description. Tracking a volunteer's training in a volunteer training check list in each volunteer's personal file not only tracks progress, but also provides a written record that it occurred.

Learning and developing new skills or honing existing ones is frequently a motivator for volunteers. Timely access to training may require a volunteer driver program to involve other transportation and transit providers to deliver the technical parts of the training program. These two goals can be met in a collaborative network that ensures access to a variety of training for [ABCD]'s volunteer drivers.

Volunteer Driver Supervision and Evaluation

The supervision and evaluation of a volunteer driver's experience can make or break a volunteer's experience. Built into a volunteer driver program, these processes enhance a volunteer pool's skills, offer feedback loops for information sharing and recognition, and provide opportunity to build solid, long lasting relationships with volunteers. Supervision and evaluation processes also provide ongoing screening to ensure the drivers continue to be a good match for the role.

Individual Supervision

Managing volunteer human resources involves processes that are very similar to paid human resources. Scheduling individual meetings with a volunteer at predetermined intervals (6 months, one year) provides a formal opportunity to have a conversation with the volunteer. At this time, you can:

- Let a volunteer know what kind of feedback you have about their performance.
- Hear how the volunteer feels about their role and their working conditions.
- Give constructive feedback if there are areas of growth or improvement for the volunteer.
- Provide support for their role in a way that is most meaningful to them.
- Provide recognition of their efforts.
- Build a succession plan to involve the volunteer in another role if they are burning out in their driver role.

Team Supervision

One of the many reasons volunteers get involved in an organization is to build relationships with people with similar values and interests. Building teams of volunteers supports the volunteers and the volunteer program by providing:

- Volunteers with peers with whom to share experiences and build relationships.
- Peer to peer training opportunities.
- "Team leaders" who may help mentor less experienced volunteers.
- An opportunity for peer to peer feedback which feeds into volunteer performance evaluations as well as overall volunteer program evaluations.

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Supervisor feedback

Whether positive or constructive, a performance evaluation is the appropriate venue to provide feedback to a volunteer. Developing a constructive feedback process is essential for tracking and documenting these conversations, keeping volunteers accountable to [ABCD], empowering their involvement, and providing systems for recognizing solid performance and/or monitoring and tracking performance that requires development.

Volunteer Driver Performance Evaluation

Committing to performance evaluations builds relationships with volunteers. In the absence of performance evaluations, [ABCD] loses the opportunity to have regularly scheduled conversations with volunteers to discuss how their role is going. Volunteers can expect effective communication and feedback loops, and evaluation. Building those supports and keeping thorough documentation assures that the care of volunteers values the relationships.

Peer feedback

Peer feedback loops can be simple and informative. A simple form that a volunteer driver can share with a peer for feedback can reveal a volunteer's interests, strengths and areas for growth that a volunteer program manager may not be aware of. These feedback forms help form a tracking system for volunteer performance and provide a tool for coaching and mentoring volunteers. Examples of areas covered in a peer feedback form include:

- The name of the volunteer being evaluated
- Name of person providing feedback for that volunteer
- What project or role they shared that provided an opportunity for feedback
- The strengths demonstrated by the volunteer
- Areas of growth that may be helpful for the volunteer
- Suggested resources the volunteer might access for that growth
- An open comment question to allow for peer comments
- A signature line for the peer providing feedback

Client satisfaction surveys

While client satisfaction surveys will indicate the outcome of the services provided, they will also provide insights into what volunteer behaviours are desired by your client base and which ones are not.

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Client satisfaction surveys will provide information about how to improve or shift orientation, training and coaching opportunities for volunteers, as well as supervision and evaluation needs. The information can act as a constant measure for volunteer program improvement and service delivery.

Client satisfaction surveys are an essential tool to a volunteer driver program. See a sample below.

Sample Rider Satisfaction Survey

Name:_____   Date:_____

Address:_____   Phone:_____

At [ABCD], we are dedicated to providing excellent service to our riders. To evaluate our service, we would appreciate your feedback about your experience(s) with the program.

Please rate our Volunteer Driver Program by checking the box that applies to these statements:

Service	Excellent	Good	Fair	Poor
When I scheduled my ride, the person on the phone was courteous.				
My driver was punctual.				
I received the assistance I required from the driver.				
We arrived at my destination on time.				
The vehicle was clean and comfortable.				
I felt safe in the vehicle.				
The driver was courteous.				
The driver wore an [ABCD] name tag and was easily identifiable.				
The driver requested that I wore a seatbelt.				
The driver drove defensively.				
The driver communicated clearly with me when needed.				

What was the name of your driver?_____

Do you have more feedback about the service the driver provided?

What are the strengths of our driving program?

Do you have a great story about our program to share with us?

How can we improve our driving program?

Thank you for taking the time to provide feedback about our volunteer driving program!

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Sample Volunteer Driver Evaluation Form

Volunteer feedback contributes to the development and evaluation of [ABCD]'s volunteer driver program. Please share your experience and help us serve our clients better.

Volunteer name:_____ Date: _____

E-mail address:_____ Phone: _____

1. How often do you drive for [ABCD]'s volunteer program?
   - ☐ Weekly
   - ☐ Biweekly
   - ☐ Monthly
   - ☐ Other_____

2. How many times have you driven for us?
   - ☐ 1-10
   - ☐ 11-25
   - ☐ 26-50
   - ☐ 50-75
   - ☐ 75-100
   - ☐ 100+

3. Describe your relationship with riders.

4. Describe your relationship with program staff.

5. Have you received adequate training to help you feel competent in your role?
   - ☐ Yes
   - ☐ No

6. If no, how can [ABCD] support the volunteer team to improve their competence?

7. What do you like most about being a volunteer driver?

8. What do you find the most challenging?

9. Is there support or training that we can provide for you to help with those challenges?

10. What other suggestions for change would you recommend so that we can provide better service to riders?

11. Do you have a story to share that would demonstrate to others the type of help we provide?

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12. Are you willing to share a quote as a volunteer testimonial?

13. Are you willing to share the story in a recruitment presentation?   With media?

14. Do you know of any service clubs or groups that we can give a presentation to about our volunteer driving program?

15. Do you know of anyone who might be interested in being a volunteer driver?

16. Do you have any questions about the program?

17. Is there any other feedback you would like to provide?

Thank you for participating in this volunteer evaluation. This information is kept confidential, however it is compiled with feedback from other volunteers to evaluate the driving program.

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Sample Peer Feedback Form

At [ABCD], we evaluate our Volunteer Driver Program by gathering feedback from riders, other volunteers, and the volunteer's Supervisor.   This feedback is kept confidential, however, it may be compiled with feedback from other volunteers to evaluate the driving program.

We are dedicated to providing excellent service to our riders. To evaluate our service, we would appreciate your feedback about your experience(s) with the following volunteer who has submitted this form to you.

Volunteer requesting feedback: _____

Project or role I am requesting feedback for: _____

Volunteer providing feedback: _____

Date: _____

How have you had an opportunity to work with the volunteer requesting feedback?

What strengths does this volunteer demonstrate?

What areas of growth and development would help this volunteer?

Do you have suggested resources the volunteer might access for that growth and development?

Do you have any other feedback you would like to share about this volunteer?

Thank you for sharing your thoughts.

Signed: _____ Date: _____

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A checklist to review driver requirements on an annual basis provides a reminder as well as a tracking document for the volunteer file.

Sample Annual Driver Checklist
To be completed as a part of the annual volunteer evaluation process

- ☐ Copy of current Driver's License on file (both sides)
- ☐ Copy of current Insurance Certificate (minimum $1,000,000 Liability) on file
- ☐ If any change in insurance company
    - o Acknowledgement from insurance company that it has been informed of volunteer driving
- ☐ Vehicle Inspection (safe operating condition, regularly maintained)

Ask volunteer:

- ☐ Has there been any change in your driving status?
- ☐ Has there been any change in your ability to drive safely?
    - o Health conditions
    - o Physical abilities
- ☐ Have there been any changes in your driving record?
- ☐ Have you been convicted of any crimes that according to our policies would prevent you from driving for [ABCD]?

Other components of the driver evaluation process have been completed:
- ☐ Rider feedback
    - o Rider family feedback if required
- ☐ Peer feedback
- ☐ Driver feedback

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Volunteer Driver Recognition

There are many reasons volunteers get involved in an organization. Whether to support a cause or to build relationships, volunteers often identify they want to do something for others that makes a difference in their lives. The top five motivators identified in volunteer driver surveys by the Beverly Foundation are:

1. To help others
2. To do something meaningful
3. To give back to the community
4. To stay active
5. Because I was asked

Personal motivators for volunteering for each volunteer can be gleaned during the interview process and during volunteer performance evaluations.

Well planned volunteer stewardship and recognition will demonstrate to volunteers how they have made a difference. The more personal the volunteer recognition is to the volunteer's motivation, the more meaningful it will be for that person.

Research demonstrates that key recognition volunteers want from their volunteer experience is often relationship based and as simple as:

☐ I want the people in the organization to know my name.
☐ I want my supervisor to clearly direct my work and give me feedback about my performance.
☐ I want the people in the organization to be welcoming and friendly.
☐ I want to be included in the activities of the organization.

If an organization can fulfill those tasks, they are well on their way to stewarding their volunteers in a meaningful way.   Including a budget line item for volunteer recognition is the next step, whether for thank you cards, milestone recognition items, volunteer appreciation events or re-assignment of volunteers to new roles.

Thank you cards
For many volunteers, a personal, sincere, hand-written note of gratitude that tells them how much their work is appreciated by the organization is what will be the most memorable.

Milestone recognition

Milestone recognition provides a system to reward volunteers for the amount of time or number of years they have contributed to the organization. If the date the volunteer is active, the number of hours they contribute, and the anniversary date of their involvement are tracked, the annual contribution can be recognized. This system of recognition is simple to implement, and provides a reminder to busy staff that an anniversary is coming due.

Milestone gifts need not be extravagant and a volunteer program can be very creative about what the gift is and how it relates to the volunteer role. Personalizing any volunteer recognition item with a hand written card signed by the supervisor and the people closest to the volunteer will add a human touch to this system.

Milestone gifts for volunteer drivers may include:
- Gift cards for services for their vehicle: oil changes, tire rotation, wheel alignments
- Gift cards for fuel, coffee shops or restaurants
- Travel mugs with the organizational logo
- Travel or driving items that will add value to their role
- Special training opportunities paid for by the organization
- Customized gift cards based on the volunteer's interest

Volunteer Appreciation Events

Volunteer appreciation events are a great way for volunteers to meet each other, meet staff, and have fun. These events appeal to those who are motivated by affiliation and want to build relationships. They are, however, not for everybody, so thoughtful planning needs to be done to ensure the volunteer program recognition budget is not focused only on this form or recognition.

Volunteer appreciation events need not be extravagant. As an opportunity to connect, and to offer the organization an opportunity to recognize volunteers in a more public way, they can be simple, imaginative gatherings that are fun to be at and easy on the budget.

Re-assignment to new roles

A volunteer may not be particularly interested in standard forms of recognition, and might rather be recognized by [ABCD] by being offered other roles with increased responsibility. Ensure that [ABCD]'s Volunteer Driver Program has increasingly responsible roles for those volunteers. They are motivated by accomplishment and achievement, and may support the program in fundraising, marketing or as a Team Lead that helps supervise groups of volunteers and/or helps with orientation and training.

Remember, the reason for volunteer recognition is to demonstrate to volunteers how they have made a difference. Ensure that your volunteer driver program practices do just that.

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Volunteer Driver Exit Interview

Having a conversation with a volunteer who is planning to leave the volunteer program in the form of an exit interview will provide information about:

- The volunteer's experience
- Whether the volunteer may be interested in a different role
- Improvements that can be made to the volunteer program

Sample Volunteer Exit Interview

Volunteer's name_____ **Date Active**_____

Interviewed by_____ **Interviewed on**_____

Supervisor's name _____ **Program** _____

1. **Were your volunteer duties and responsibilities what you expected?**
    _____
    _____
    _____

2. **Please share your thoughts about:**

    a. **Your volunteer role**
        _____
        _____
        _____

    b. **Your volunteer working conditions**
        _____
        _____
        _____

    c. **The orientation you had to your role**
        _____
        _____
        _____

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d.   **The training provided by the organization**
_____
_____
_____

e.   **[ABCD]'s volunteer recognition**_____
_____
_____

f.   **Other benefits of volunteering** _____
_____
_____

g.   **Your treatment by your supervisor**_____
_____
_____

3.   **What is your major reason for leaving this volunteer role?**
_____
_____
_____

4.   **Is there anything we could be doing to keep you from leaving?**
_____
_____
_____

5.   **What could be done to make [ABCD] a better place to volunteer?**
_____
_____
_____

6.   **Do you have any questions or comments?**
_____
_____
_____

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Volunteer Driver Program Policies and Procedures

The Volunteer Driver Program Policy Manual includes all policies and procedures adopted by the organization, providing a framework that defines and supports the involvement of volunteers. It includes all standards of practice that complies with the Canadian Code of Volunteer Involvement including:

1. Mission based approach: Mission of the organization and how the volunteer program contributes to the mission.
2. Human Resources: How volunteers can expect to be treated by the organization and what the processes are for volunteer engagement, supervision, evaluation, recognition and exit.
3. Policies: Policies and procedures adopted by the organization that provide a framework that defines and supports the involvement of volunteers.
4. Program accountability: Lines of reporting for the volunteers
5. Recruitment: Volunteer recruitment incorporates internal and external messages to reach out and involve a diverse volunteer base. Sharing messages with volunteers empowers them to help with recruitment.
6. Screening: A clearly communicated volunteer screening process is adopted and consistently applied. Volunteers are aware of process and rationale and can help screen prospects.
7. Orientation and Training: Each volunteer is provided with an orientation to the organization, its policies and practices, including the rights and responsibilities of volunteers. Each volunteer receives training customized to the volunteer role and the individual needs of the volunteer.
8. Supervision: Volunteers receive a level of supervision appropriate to the task and are provided regular opportunities to give and receive feedback.
9. Recognition: The contributions of volunteers are consistently acknowledged with formal and informal methods of recognition.
10. Record management: Standardized documentation and records management practices are followed in line with the relevant legislation. Volunteers know where their responsibilities lie for reporting.
11. Evaluation: The impact and contribution of volunteers and the volunteer program are continually evaluated to ensure the needs of the organization are being met in

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fulfilling its mandate. Documentation of processes, tools for evaluation and reporting is maintained to analyze progress and impact.

A Volunteer Program Manual becomes part of an orientation for volunteers, a resource for personnel, and an evaluation tool for the volunteer program. If at any time there are challenges to the program, they act as the standard of care of the organization.

Check list of volunteer driver program policy and procedures:

- ☐ Recruitment
- ☐ Screening
  - o Application
  - o Interview
  - o References
  - o Background checks
  - o Driving record check
  - o Criminal record check
  - o Interview
  - o Qualification documents
- ☐ Records management and storage
- ☐ Orientation
- ☐ Training requirements
- ☐ Policy related to the position requirements:
  - o Contracted commitment
  - o Insurance coverage
  - o Trip definitions
  - o Trip reimbursement
  - o Rider eligibility
  - o Service area
  - o Scheduling and dispatch
  - o Turn downs, late cancels and no shows
  - o Use of phone, internet
  - o Incident and accident reporting
  - o Gift acceptance
  - o Harassment policy
  - o Human rights policy
  - o Privacy policy
  - o Criminal record check appeal
- ☐ Supervision
- ☐ Evaluation
- ☐ Recognition
- ☐ Re-assignment / Exit

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Volunteer Driver Program Evaluation

Evaluating your Volunteer Driver Program is multi-faceted. Ensuring the resources invested in this program are achieving the desired outcome and supporting the mission of the organization helps:

- ☐ Develop a case for support for funding, program development and/or expansion
- ☐ Develop messages for the recruitment of volunteer drivers
- ☐ Improve your volunteer program to increase your driver and rider satisfaction
- ☐ Increase morale when the workload is heavy
- ☐ Provide benchmarks for recruitment and finances
- ☐ Communicate the results of the program's efforts to stakeholders
- ☐ Enrich reporting
- ☐ Recognize the efforts of your volunteers

Program evaluation relies on a data collected from these sources:

- ☐ Supervisor and staff feedback
- ☐ Rider satisfaction surveys
- ☐ Rider testimonials
- ☐ Driver peer feedback
- ☐ Data collected on:
    - o Number of hours of service provided
    - o Market value of the hours contributed
    - o Number of roles or services provided by volunteers
    - o Number of FTE's volunteers contribute to the mission of [ABCD]

Building a communication feedback process so that all stakeholders in the organization know of the achievements of the Volunteer Driver Program takes thoughtful planning. That feedback loop may include:

- ☐ Volunteer driver team meetings
- ☐ Volunteer program news
- ☐ Staff meeting reports
- ☐ Executive Director and Board of Directors reports
- ☐ Newsy stories on [ABCD]'s website and in newsletters
- ☐ Funding proposals
- ☐ Recruitment messaging

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Volunteer Driver Program Records Management

It is the responsibility of the Manager of Volunteer Resources to ensure that the all records related to the Volunteer Driver Program are maintained in a manner that:

1. Fosters compliance to relevant legislations related to privacy and human rights
2. Provides security of confidential information
3. Fosters adherence to the Canadian Code of Volunteer Involvement
4. Maintains statistics for reporting
5. Provides a case for support for the volunteer driver program
6. Complies to the organization's operational policies
7. Provides for succession planning

Policy must be developed about the length and manner of storage, and the destruction or shredding of files containing confidential volunteer information related to their involvement and all human resource processes related to that involvement such as:

- Volunteer Job Description
- Application
- Interview notes
- References and reference checks
- Criminal history checks
- Driving abstract
- Copy of Driver's License
- Copy of Insurances and any correspondence with insurance company
- Letter of Agreement
- Training records
- Any evaluation processes
- Performance evaluations
- Annual check list

Volunteer Program Database

A database that tracks volunteer information, hours of involvement, roles, value of roles and schedules is essential to a Volunteer Driver Program. The database can be custom made for [ABCD], be a part of a larger contact database that [ABCD] uses, or be one of the many available tools in the marketplace specifically designed for volunteer programs, some of which are

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online. Most companies will provide a demo and pricing so [ABCD] can assess which is the best match for the organization.

Some examples of volunteer management databases:

1. Volunteer Impact
   http://www.volunteer2.ca/volunteer-impact-introduction.asp

2. VolGistics
   http://www.volgistics.com/2-0.htm

3. Volunteer Reporter
   http://www.volsoft.com/products/reporter.htm

4. CareWorks
   http://www.aboutcareworks.com/careworks_software/index.htm

5. OrgAction
   http://www.orgaction.com/

6. VSys One
   http://www2.vsysone.com/guided-tour

Taking the time to choose the database for information tracking that is right for your volunteer driver program will pay off in staff time, reporting and analysis of [ABCD]'s program. Developing and maintaining good records is a program essential. The administration of the volunteer driver program is complex and requires strong competencies in records management.

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    www.itnamerica.org

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