



LOCAL TRANSPORTATION SOLUTIONS FOR SENIORS

TRANSPORTATION ESCORTS *for Seniors*



AN ADDENDUM TO
A Solutions Package for Volunteer Transportation Programs

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INTRODUCTION

Community mobility, or the ability to get ourselves around, is vital to our quality of life. This can be particularly challenging for many older adults and people with disabilities. When an individual can no longer meet his or her mobility needs independently, he or she becomes reliant on others to meet those needs. When available, family caregivers, private and volunteer transportation providers and public transportation are often the most reasonable alternatives, in order to remain connected to the community. Even when alternative transportation options are available, however, individuals may still need additional personal assistance to make use of these options. In other words, rather than the stop-to-stop or curb-to-curb transportation services that are generally provided through most public transportation and para transit providers, some older adults require a higher level of assistance, called door-to-door or door-through-door transportation.

In 2003, Easter Seals produced the *Solutions Package for Volunteer Transportation Programs* with funding from the Administration on Aging, National Family Caregiver Support Program. The Solutions Package addresses many aspects of operating a volunteer transportation program and is aimed at helping organizations build a new volunteer transportation program or enhance an existing one. (The *Solutions Package for Volunteer Transportation Programs* is available online at www.easterseals.com/transportation.)

As an addendum to the Solutions Package for Volunteer Transportation Programs, this manual takes a closer look at the role of the transportation “escort” within the range of senior transportation services. To do this, we asked several private and volunteer transportation programs across the U.S. to share their experience and expertise in the area of transportation escorts. For the purposes of this project, a transportation escort—often referred to as a companion or attendant—is an individual, usually someone in addition to the driver, who is arranged for by the transportation provider to support the physical, cognitive or social needs of the older adults that they are transporting.

Older adults who are especially frail or have physical disabilities or cognitive impairments often have fears that may be eased if they have an escort to accompany them on trips. Some older adults require physical assistance to prepare for a trip, enter and exit the vehicle, do their shopping, enter a place of worship, locate an office or interpret a physician’s explanation or directions. In many cases, it is the additional assistance that an escort provides that allows access to transportation, connectivity to the community, and in some instances, enables older adults to remain living independently in the community.

THE TRANSPORTATION ESCORT

The Setting

Transportation escorts work in a variety of settings. Transportation providers utilize escorts with multiple passengers and shared rides, as well as on single-passenger trips. On para and special-transit buses or vans, drivers often are not able to leave their vehicle to provide assistance from their homes or assure that riders get to their final destination, due to time constraints or supervision of other riders. Likewise, if riders become agitated or require other assistance during the ride, a driver may not be able to attend to the rider's needs. In these cases, providers often have a paid or volunteer escort on the vehicle to provide assistance and support to both the riders and the driver—as we often see for adult day services transportation.

Some transportation providers who use personal vehicles—either agency owned or driver owned—to provide rides to a single passenger (or a shared ride to two or more passengers) also have an additional person, or escort, in the vehicle to provide additional assistance. In these situations, transportation escorts often provide support, companionship and assistance to the rider. Transportation escorts are also utilized to accompany older adults on public transportation when it is possible for them to use traditional public transportation. For instance, Faith in Action West Austin Caregivers in Texas is piloting a new “Bus Buddies” program, and the Ride Connection in Oregon has a “Ride Ambassador” program where the transportation escort rides with, and provides assistance to, the rider on public buses, trains or para transit vehicles.

Finally, some volunteer transportation programs and community-based agencies provide a transportation escort to family caregivers who are hesitant to, or concerned about being able to, provide the level of assistance that their loved one requires, but who wish to continue driving their loved one. For instance, when transporting a person with dementia, family members and formal transportation providers alike may require an escort in order to attend to agitated behavior and maintain safety.

Programs that provide transportation escorts come in all shapes and sizes—from those who provide 40 or fewer roundtrip rides a week to those who provide over 200 a week; from those who have just a few drivers to those who have hundreds of drivers; and from those with escorts that provide assistance on 1-3 rides a month to those who make several trips every week. They are referred to as escorts, concierge, medical advocates, ride ambassadors, bus buddies, companions and caregivers, among others.

Programs that offer transportation escorts have a variety of service parameters as well. Some serve small areas or focus their efforts in just one or two counties, while others span county lines

and may collaborate with programs in adjacent counties so that riders can travel longer distances to their destinations. At the same time, some programs transport a specific group to a specific destination (i.e., adult day centers, medical appointments, etc.), while others serve only clients or members of their organization. Still other programs provide rides for any older adult in the community who requests, or is eligible for, their services to a variety of destinations including shopping, errands, hair dressers, social events, faith centers, etc.

The Escort Role

Transportation escorts provide assistance and support in a number of ways—and often fulfill more than one role. In programs that provide one-to-one transportation by volunteer or paid drivers, the driver often functions as the escort, as well. He or she may provide assistance from inside the rider’s home, into the vehicle and into the destination—often accompanying the rider during an appointment or at a store. In other programs, the transportation escort is a person in addition to the driver—paid or volunteer—who provides necessary assistance to passengers. The types of assistance that escorts provide varies from program to program and from rider to rider—dependent upon rider needs and program policies. (See attachments A-1 – A-9 and A-23 for sample policies and procedures.) The variety of assistance that escorts may provide to riders includes:

- putting on their shoes and coat to prepare for trip
- collecting their bags for their trip
- getting to the vehicle
- escorting them to/from their destination (office, building, store, church, synagogue, etc.)
- shopping
- accompanying them to an appointment
- filling out paperwork
- assisting with interpreting information
- relaying information to family/caregivers
- accompanying to social event
- providing socialization and companionship
- assisting with agitation/behavioral issues during the ride

For riders who require door-through-door assistance, this may be the only way they can maintain a connection to their community. In a 2005 report, Burkhardt and Kerschner list four levels of door-through-door support:

- **Gentle Support:** Opening doors and providing verbal guidance.
- **Physical Support:** Providing physical support for the rider to assist with balance, assist in climbing steps or performing similar functions. This support may include delivering the rider to an attendant at the destination who then takes over the task of personal support and assistance. This “handoff” function is sometimes called “hand-to-hand” or “chair-to-chair” service.
- **Activity Support:** The driver or escort stays with the rider and helps with the activity at the destination. For example, the driver or escort may assist the rider inside a grocery store, help the rider understand a doctor’s instructions or diagnosis or serve as an advocate for the rider’s travel needs.
- **Personal Support:** The driver or escort may help the rider put on coats, shoes or boots, and help by putting away groceries in the rider’s home. Some drivers or escorts are, or become, friends of the rider and offer emotional or other personal support.¹

¹ Burkhardt, J. E., & Kerschner, H., (2005, September). *How to Establish and Maintain Door-Through-Door Transportation Services for Seniors*. Washington, DC: Administration on Aging.

PROGRAM MANAGEMENT

Recruiting and Screening of Escorts

While some transportation programs provide transportation escorts from their own volunteer/staff base—either through a formal definition and assignment of roles, or through informal “buddy systems” that form among volunteers—others have formed innovative collaborations with other branches of their business or outside organizations in their communities. For example, for the purposes of providing transportation escorts for riders, transportation programs collaborate with other volunteer agencies, American Cancer Society chapters, Councils on Aging, home health care agencies or other community-based transportation providers, among others.

Programs that use their own staff or volunteers as their transportation escorts may recruit specifically for the position of escort, however, their staff/volunteers may transition from another role, or it may be a component of their job description—such as in the case of a respite companion or volunteer driver/escort. Taking on the role of escort may be the next step for a driver who no longer is able to—or chooses not to—drive, or for a caregiver or friendly visitor who enjoys helping others while being out in the community. It is likely that a transportation escort fulfills more than one role in the organization. He or she may also be a dispatcher, transportation or caregiver scheduler, a caregiver/companion or a driver. (See attachments A-1 – A-3, A-10 and A-11 – A-17 for sample volunteer/role descriptions.)

Recruitment and screening efforts for escorts are often targeted differently than for drivers and other program staff and volunteers primarily because an escort doesn’t require a driver’s license and must be especially social, caring and comfortable with older adults. Of course, when a driver also serves as the escort, the driver would need to meet both driver and transportation escort criteria in terms of qualifications. But, when it comes to interviewing, screening and background checks, they often go through a similar process and have similar requirements. (See attachment A-4 – A-5 and A-12 for sample driver requirements, selection criteria and application process refer also to pages 10-12 of the *Solutions Package for Volunteer Transportation Programs*.)

Faith in Action West Austin Caregivers have shared some helpful hints in terms of volunteer recruitment and retention, and addressing concerns about door-through-door, escort-related tasks:

- “Being very clear about tasks that are required and the amount of time that these tasks will usually require.

- Matching different kinds of tasks to the differing skills and personalities of particular volunteers.
- Providing other volunteers to share the volunteer experience by acting as escorts (sometimes called ‘ride-along buddies.’)²

Escort Training, Eligibility and Matching

Various orientation and training curricula are used for training drivers and transportation escorts—and programs require different levels of training. Important components of training, in addition to defensive driving and other related issues for drivers, include: sensitivity, confidentiality, normal aspects of aging, body mechanics/physical assistance and communication, as well as any program-related policies and specifics. (See attachments A-5, A-13 – A-17, and A-24 – A-34 for examples of training policies and requirements; see attachment A-22 for sample Volunteer Confidentiality Agreement.) A variety of materials are available for orientation and training, such as Easter Seals Transportation Solutions for Caregivers: A Starting Point, a toolkit and facilitator manual. (Find this toolkit online at www.easterseals.com/transportation. Refer also to pages 13-14 and A-32 to A-55 of the *Solutions Package for Volunteer Transportation Programs*.)

Some programs have established eligibility criteria for riders to request transportation escorts, while others simply provide escorts based on rider requests alone. Eligibility criteria may include being 60 years or older, program-specific assessment/rating criteria, having a disability that prevents use of public transportation (corresponding with ADA requirements) or being an existing client of organization for other services/programs. At the same time, identifying a client’s need for escort services is often done simply through client/rider request—using a formal process or informal request—or through observation. In the case of para transit, the level of need for an escort may be determined by Medicaid or the facility that orders transportation services.

Important to the success of the program is the matching, or pairing, of escort to rider, and also escort to driver. In some cases, especially on vans or for shared rides, a transportation escort may simply be assigned to a particular driver. Some programs allow the drivers to recruit friends or family to volunteer to create a “buddy system,” while others base assignments on area, schedule and availability. Often, personalities and compatibility of escorts and clients are taken into consideration as much as possible. This process may take time and familiarity, so more than one escort may work with a client before a “match” is made. (See attachment A-18 – A-19 for a sample Volunteer Escort Request Form.)

² Ibid.

Paying for Transportation Escorts

Transportation escort services are funded in a variety of ways dependant, in part, on the type of organization and the services provided by both the organization and the transportation escorts themselves, as well as the organization's billing mechanisms. Volunteer transportation escorts who ride with volunteer drivers, special and para transit drivers or with family member drivers often donate their time to the program or are supported by grant funds. When volunteer drivers also function as escorts, grant and fundraising dollars often pay for mileage reimbursement and other expenses. When transportation programs—volunteer or other—have collaborative relationships with home health or other agencies to provide transportation escorts, payment for escorts may be made by riders privately, though grants and other fundraising mechanisms or by insurance or Medicaid. The same is true for para and special transit providers that either use their own staff or outside agency staff to provide transportation escorts for their eligible riders.

Risk Management

Volunteer organizations often cite difficulties in recruiting volunteer drivers and escorts due to the demands of work, other life circumstances and, often, heightened concern around insurance and liability. In the following section, we address risk management from an organizational perspective, to answer questions, give some basic information about risk management and avoidance, and to ease concerns about liability issues. (See pages 16-21 of the Solutions Package for Volunteer Transportation Programs. Burkhardt and Kerschner also address risk and insurance in their 2005 report for the Administration on Aging. You can find this document online at:

www.aoa.gov/prof/transportation/media/Door-Through-DoorGuide/HowToGuide_DoorThroughDoorTransportation.pdf)

RISK MANAGEMENT GUIDELINES:

Safely Integrating Transportation Escorts in Your Program

Overview

A transportation escort is an individual who accompanies a client to support their physical, cognitive or social needs. While the tasks performed by an escort may differ from one organization to the next and from one trip to the next, there are common risks and concerns that arise in the deployment of paid or volunteer escorts as part of a transportation program for seniors. These risks should be acknowledged by any program providing senior transportation, and can be managed through careful planning and thoughtful action.

What are the Risks?

The downside risks of involving transportation escorts include:

- Harm suffered by the client/consumer due to the escort's negligent conduct
- Harm suffered by the client/consumer due to inadequate training
- Harm suffered by the client/consumer due to intentional conduct by the escort
- Harm suffered by the escort due to the actions/conduct of the client
- Harm suffered by the escort and/or client as a result of an automobile accident
- Harm suffered to the reputation of the program due to the inappropriate or careless conduct of the escort.

What Risk Management Strategies are Necessary to Manage these Risks?

All of the risks listed above can be effectively managed by a community-serving organization providing senior transportation. Care and attention should be paid to the following areas.

Step 1: Position Design

Before recruiting individuals to serve as transportation escorts, care must be taken to outline the responsibilities of the position and the requirements for eligible candidates. These responsibilities and requirements will differ from one program to the next. Your requirements should be documented and serve as the basis for determining eligibility. Taking the time to consider

the requirements for the position increases the odds of success—the selection of a suitable applicant in the position of transportation escort.

The Position Description

Job position descriptions are important risk management tools for several reasons. Position descriptions enable the organization to determine the kinds of information it needs to collect from applicants and others during the screening process. The position description helps to determine how extensive the screening process needs to be in order to reasonably protect service recipients, other staff members and the interests of the organization. Developing written position descriptions and selection criteria will help you place qualified people in positions where they can help your organization deliver strong services to your community and thereby accomplish its mission.

The first part of a typical position description addresses the position's duties, responsibilities and limitations. The duties and limitations stated in the job description should guide your screening process. For example, if the position description calls for an individual to work one-on-one at a senior's residence to help them prepare for a trip, the organization has a legitimate interest in the person's experience handling someone else's money, and any history of theft, embezzlement or misappropriation of funds. Inquiring into these matters for a different paid position could be inappropriate and possibly unlawful.

Since all transportation escort positions require working directly with service recipients, the areas of interest for screening may include how well the individual relates to others; any indications of abusive behavior toward clientele or staff in other, similar circumstances; and the applicant's ability to relate to individuals from different ethnic backgrounds.

A position description should state the qualifications and training necessary to the responsibilities of the assignment. Minimum qualifications should be justified by the work to be performed and should, to avoid legal problems, be performance-based. Asking if an applicant can lift a 40-pound box is less likely to screen out someone inappropriately than asking if an applicant has a bad back (but only if lifting something weighing 40 pounds is an essential requirement of the position).

If duties involve risk factors that can be reasonably anticipated, the position description should specify qualifications that will minimize the risk. For example, rather than specifying experience working with seniors, your position description might specify experience working with seniors with dementia, or experience assisting frail elderly clients enter and exit cars and vans and first aid/CPR certification.

Training is an integral aspect of risk management. The position description should specify any training your program will require prior to assuming a position. The training may be a simple orientation explaining the organization's goals and giving limited guidance on proper procedures. Or the training may be more extensive, providing staff with specific, position-related skill development. Describing required training in the position description may eliminate individuals unwilling to complete the training.

Step 2: Screen Applicants

Basic Screening

The next risk management step is to complete basic screening for all escort applicants. Basic screening consists of a written application, interviews and reference checks.

A general application form that includes at least the following six elements provides a solid foundation for screening prospective escorts:

- **Identification.** The application includes items such as the applicant's name, Social Security number (if appropriate), and addresses for the past five years with dates of occupancy.
- **Qualifications.** The application includes information documenting the applicant's qualifications for the position. The kinds of information needed for this may include academic achievement, training courses with dates of completion, and certificates and licenses (with their expiration dates).
- **Experience.** The application asks the applicant to list relevant experience, both paid and volunteer; dates of service; descriptions of duties; organizations where service was provided; and names of immediate supervisors with addresses and telephone numbers to facilitate verification of the information.
- **Background and References.** If permitted, the application asks for a listing of any *convictions* for criminal offenses or serious motor vehicle violations. You may want to identify the specific violations about which you are most concerned. For example, you may ask, "Have you ever been convicted of sexual assault, rape or any other form of sexual misconduct?" Some offenses may have greater predictive value if they are recent offenses. The question on your application might ask, "Within the past five years, have you been convicted of theft, robbery, embezzlement, or forgery?"
- **Waiver/Consent.** The application should include a statement indicating that the applicant certifies that the information provided is true and accurate. Further, the applicant should be

asked to authorize the organization to verify the information included on the application and specifically waive any rights to confidentiality. The application should also contain a statement that the post-hire discovery of any misstatement on the application will be grounds for immediate dismissal. In the interest of full disclosure, the statement should specifically list the procedures that the applicant authorizes the organization to perform, such as criminal history record checks, reference checks and employment verification.

- **Signature and Date.**

Additional Issues

For volunteer positions, questions about arrests are permitted. Also, the application should ask for references from other organizations in which the applicant served as a volunteer or at least three personal references from individuals who are not related to the applicant, but who have known the applicant for a period of time. In addition to their names, addresses and telephone numbers, the nature of the relationship and the length of time they have known the applicant should be included. For paid positions, the application should request three work-related references.

Reviewing Applications

The objective of screening applications for both paid and volunteer staff positions is to fill available positions with qualified individuals. In a way, the screening process is similar to fitting differently shaped pegs into holes with corresponding shapes. For most paid positions, you begin with a hole of a certain shape and try to find the peg that most closely fits into the hole. With volunteer positions, you may more often begin with an assortment of pegs and try to find holes into which the pegs will fit. In each case, the position description shapes the hole that determines the fit.

Some nonprofits use a formal rating sheet to evaluate applications. They use a checklist detailing position requirements and assign a numerical rating to each requirement. For example, one point is assigned if an applicant marginally meets the criteria, three points if the applicant fairly meets the criteria and five points if the applicant meets the criteria in an outstanding fashion. The score is then totaled, and only the top candidates are invited for interviews.

Interviewing

Interviews are an opportunity to get to know the applicants and to respond to any questions that they may have. One of the effective means of helping applicants focus on the demands of the position is to pose hypothetical questions to them about situations that could arise while performing

escort duties. For example, what would the escort do to ensure that the oxygen-dependent senior being escorted did not run out of oxygen while being transported? How would the escort respond to a senior's urgent need to use the restroom?

When posing these interview questions, the interviewer needs to have a firm grasp of the agency's procedures and be able to discuss the procedures as well as the reasons behind them. Posing the questions gives applicants a better concept of the kinds of things that they may experience when serving as escorts and the responses give a better idea to the agency of the judgment the escort brings to the position. As not all situations can be anticipated, ability to analyze situations and make reasonable decisions could be a key element in the selection criteria.

Reference checks are another element in the basic screening process. References may be personal, from other volunteer organizations or from employers. The key is to seek information concerning the requirements of the position—work with dependent elderly or other disabled persons, maturity, honesty and dependability.

Further Screening

Dependent elderly persons are a vulnerable population of clientele that deserve additional protection from the agencies upon which they rely for assistance. This may require escorts to undergo criminal history record checks as part of the screening process. Record checks are available from a variety of sources including government agencies as well as from private vendors. Agencies should select a record check provider that can meet the organization's need to demonstrate due diligence in the selection process.

Step 3: Select Escorts and Provide an Orientation

The next step in managing the risks associated with a transportation escort program is to select escorts who meet the requirements detailed in your position description and provide an orientation to the organization and the work they will be doing.

A critical element in the orientation and training of transportation escorts is ensuring that escorts know proper ways to assist the elders entrusted to their care. Proper lifting techniques, wheelchair transfers, oxygen protocols, emergency procedures and incident reporting are all topics that should be included in the agency's orientation and training of transportation escorts.

Another area that needs to be covered in the orientation session is the code of conduct that the organization expects the escorts to follow. Because of the vulnerability of dependent elders, the organization must make clear its expectations that escorts limit their relationships with their clientele

to assigned activities and that receiving gifts from clientele is outside of acceptable boundaries. Preservation of client confidentiality is another area that agencies must make unambiguously clear is a responsibility of transportation escorts. In the course of their duties, escorts may learn about medical conditions, treatments, medications or other facts about their clients that must not be shared with others. (See attachment A-22 for sample Volunteer Confidentiality Agreement.)

Step 4: Supervise Escorts

Effective supervision of transportation escorts is vital to increasing the safety of your program. Program supervisors should provide feedback to escorts with regard to their performance, while serving as sounding boards for questions and concerns that arise. Some of the issues likely to arise for which escorts might seek support include:

- Client requests a service or assistance the escort has not been trained to provide—how should these requests be handled?
- Escort becomes concerned about the care the client is receiving from family members, medical personnel or other caregivers—who should be notified about these concerns and what actions are in order?
- Escort becomes concerned about the living conditions of the client—housing, nutrition, cleanliness—what should the escort do to help the client?
- Escort feels insecure or unsafe in areas clients receive assistance—how can these feelings be addressed?

Supervision of escorts also means ensuring that escorts are punctual and reliable when performing their duties. The agency's clientele are often in need of services that are scheduled days or weeks in advance and failure to arrive in time for their appointments may result in unacceptable delays in receiving medical care, therapy or other life-enhancing services. Supervisors need to ensure that escorts give adequate notice when they are unable to fulfill an assigned trip and that sufficient back-up is available to fill-in for no-shows.

As part of the supervision of transportation escorts, agencies should seek feedback from clients and from the family members of clients. Areas of concern include any attempts by the escort to obtain gifts or unauthorized payments for services; visits at times other than when scheduled for escort duty; intruding into the family's life; and being overly attentive.

Step 5: Evaluate and Retain/Dismiss Escorts

Your program should commit to evaluating the effectiveness and service provided by transportation escorts as part of your commitment to enhancing the safety of the program. Escorts who fail to follow your program rules or who are unable to perform the essential tasks of the position should be reassigned to other duties or dismissed. Escorts will appreciate receiving feedback from supervisors and if offered in a constructive way. This feedback will be instrumental in helping them make adjustments that strengthen the program.

There are some violations of policies that are so serious that immediate dismissal may be the only appropriate remedy, for example, an escort who uses any kind of physical punishment with a client. There may be other violations that are unintentional caused by lack of knowledge or training. Supervisors may want to offer remedial training to ensure that the same violation doesn't occur in the future and be able to retain the escort.

Insurance Considerations

Adult day service programs generally purchase a variety of insurance coverage that address varying exposures. The limits of liability, deductibles, policy terms and policy types selected by each organization vary to a large degree depending on:

- **The availability of coverage and policy terms desired by the organization.** In some cases, an organization may wish to purchase a limit of liability that its carrier (and alternative carriers) are simply unwilling to provide;
- **The organization's ability to afford the coverage it seeks.** In many instances, a organization must make difficult choices between the coverage that it would like to buy and what it can reasonably afford at the time the coverage is purchased.

Two forms of coverage that are particularly important when considering the risks of deploying transportation escorts are accident insurance and automobile coverage. If an escort is injured while riding as the driver or passenger in a vehicle, the coverage on that vehicle will be triggered first to pay for the accident-related injuries. If the coverage on the vehicle is inadequate to cover the costs associated with the accident, the program's excess automobile liability coverage ("non-owned vehicle coverage") may pick up where the automobile coverage left off. If an escort is injured outside of a vehicle while performing service, e.g. while crossing the street, the cost of his or

her injuries may be covered under a volunteer accident policy. If the escort were a paid employee the applicable coverage would be workers' compensation.

Accident Insurance:

Accident policies are relatively inexpensive policies that finance the cost of medical treatment for individuals (volunteers and/or participants, including escorts) who are injured while delivering services for or receiving services from an organization. These policies usually pay the costs of emergency room services and follow-up treatment to pre-determined limits based upon the kind of injury. For example, a broken leg may have a limit of \$2,500, while an eye injury might be limited to \$1,500, unless the injury resulted in the loss of sight in the eye, in which case the limit may be \$15,000 (these amounts are hypothetical and intended for illustrative purposes only). Usually these policies do not have deductibles. *Note: an accident and injury policy does not respond to illness nor does it protect the organization from liability for the injury.* One distinctive feature of an accident policy is that it will pay a claim regardless of who is at fault. These policies are generally written as “excess insurance,” meaning that they pay only after other available insurance – generally the insured’s personal health insurance – is exhausted. If the volunteer or participant is uninsured, the accident policy would “drop down” and become primary coverage for the injury. Accident policies provide affordable coverage for an organization concerned about volunteers or participants who may be uninsured or underinsured for injuries sustained while volunteering.

Business Auto Coverage:

The “business auto policy,” also called the “business auto coverage form” or “commercial auto policy,” provides liability coverage and physical damage coverage. All volunteer transportation providers should purchase some form of auto coverage. Organizations that *own* vehicles should purchase coverage for their owned vehicles (as well as “non-owned” coverage for other vehicles), while organizations that rely on vehicles owned by employees and/or volunteers should purchase “non-owned” auto coverage. Non-owned and hired auto liability coverage is typically the only auto coverage a nonprofit will require if it does not own any vehicles. Auto liability is sometimes referred to as “third party” coverage, because it protects the first party (the buyer of the policy, or nonprofit) from suits or claims filed on behalf of third parties —the person(s) who suffered bodily injury or property damage. The other main coverage provided in the BAP is “physical damage” coverage. The most common types of physical damage coverage are “collision” coverage and “comprehensive” coverage. As the name implies, collision coverage pays for loss to a

covered (insured) auto or its equipment caused by the covered auto's collision with another object or overturn. "Overturn" is an insurance term that refers to an auto rollover. Most physical damage losses are collision claims. It's important to remember that when a volunteer or program staff member is driving their own vehicle on the organization's behalf and is involved in an at-fault accident, the volunteer or staff member's personal insurance will respond first. The organization's non-owned auto policy will respond if and when the limits of the driver's personal experience have been exhausted.

ATTACHMENTS

Easter Seals South Florida Senior Escort Program Policies and Procedures Manual

Easter Seals South Florida, Inc. is a non-profit organization with the mission to provide services to children and adults with or without disabilities and other special needs. Through our services, we also give support to their families.

INTRODUCTION: Activities of daily life can be full of obstacles. Public transportation is inadequate. The Metrorail serves a very restricted area. Buses run infrequently and only on major thoroughfares. Taxis are expensive, and many taxi drivers are reluctant to take short fares. Alternative transportation is exceedingly limited. Special Transportation Service for the elderly and disabled is inadequate and reliability is an obstacle. Medicaid transportation is exclusively for Medicaid recipients and for medical appointments only. Consequently, those seniors who are unable to drive often cannot get out. This only aggravates their vulnerability to isolation, loneliness, and depression, all known risk factors for increased morbidity and complications.

Overview

The Local Transportation Solutions for Seniors in South Florida is part of a National Easter Seals two-year project funded by the Retirement Research Foundation. The objectives of the project in South Florida are to develop culturally sensitive and language appropriate training materials for caregivers and drivers and to provide transportation escorts to seniors unable to drive. The Senior Escort Program (SENIOR ESCORT PROGRAM) has been developed for Miami-Dade seniors 55 years and older who cannot drive or do not have available adequate transportation.

Goal: The goal of the Senior Escort Program (SENIOR ESCORT PROGRAM) is to provide reliable and safe transportation for older adults who lack accessibility to an adequate transportation service and to improve their quality of life.

The program is designed to use volunteers including but not limited to AmeriCorps members to transport or accompany seniors on their rides to medical, shopping, social and or educational trips. It is a volunteer transportation program. Transportation escort services are provided for trips scheduled in advance. Senior participants are requested to schedule rides at least **48 to 72 hours in advance**. It is not guaranteed that every request will be filled. Services are prioritized based on the availability of volunteers, and schedule of the trip. The ability of Easter Seals to provide transportation services is limited to the availability of volunteers and the scheduling of them to meet the seniors needs. .

Requests for Escort services are made by phone. The phone call may be made by the senior, relative or friend or a referral agency. The Home Services Coordinator arranges the services by matching available volunteer with the

needs of the participant. Cancellations, changes to schedules and any other problems are reported to and managed by Easter Seals South Florida. The Senior Escort Program team consists of a Program Director, Project Coordinator, Home Services Coordinator, and Volunteer Escorts/Drivers.

Description of Duties

PROGRAM DIRECTOR: The administrator of the Easter Seals South Florida SENIOR ESCORT PROGRAM is the Director of Adult Day Services.

The Program Director:

- Oversees the operation
- Ensures program compliance
- Monitors program outcomes
- Analyzes data gathered
- Determines and evaluates strategies employed to obtain desired outcomes including the recruitment of volunteers, identification of partners and obtaining referrals.
- Prepares training curriculum for volunteers
- Coordinates volunteer trainings
- Supervises and evaluates the performance of the Project Coordinator, Home Services Coordinator, and Data Entry Clerk.
- Formulates policies and procedures, supervises that these are implemented consistently, and revises them as necessary.
- Screens volunteers, including verification of drivers license, vehicle registration, vehicle insurance and criminal background checks
- Monitors and processes program expenditures

PROJECT COORDINATOR: Is responsible for administration, community outreach, marketing, and reporting. The Project Coordinator may be assisted by one or more volunteers in the fulfillment of duties assigned.

The Project Coordinator:

- Prepares and distributes marketing material
- Disseminates information to community agencies and persons transporting seniors.
- Conducts outreach activities
- Prepares quarterly program progress reports.
- Develops measures of success
- In conjunction with the Program Director develops policies and procedures
- Assists in the volunteer recruitment efforts.
- Assists with administrative duties as needed
- Screen referrals for volunteers
- Secures volunteer drivers incentives and perks

HOME SERVICES COORDINATOR: Is responsible for scheduling trips and matching volunteers with requests for services. The Home Services Coordinator will be assisted by one or more volunteers.

The Home Services Coordinator:

- Assists in the recruitment of volunteers
- Conducts initial volunteers interview
- Collects documents and information from volunteers for the background check, driving record, insurance verification, and personal references.
- Receives and screens all requests and referrals for escort services
- Schedules escort services, matching service requests with availability of volunteers based upon demographics, geography, schedule, language, and sets of skills.
- Completes service authorizations, and dispatches volunteers.
- Prepares weekly schedule for volunteers and finds substitutes as needed.
- Evaluates volunteers
- Assists in volunteer training sessions
- Receives volunteer service logs

VOLUNTEER ESCORTS/DRIVERS: Provide transportation and/or escort services to adults over the age of 55 who do not have access to adequate transportation services.

The volunteer Escort/drivers are responsible for:

- Providing updated accurate information to Easter Seals South Florida
- Providing Easter Seals with a specific available schedule
- Informing Easter Seals of their geographic work area
- Notifying any changes in availability, address, phone numbers, driver's record, insurance and/or vehicle condition
- Attend initial volunteer orientation and monthly training/meetings.
- Being punctual for assignments
- Assisting the participant in and out of the vehicle
- Providing courteous and respectful riding experience to participants
- Handling participant's fare only when necessary and authorized
- Remaining with the participant, unless otherwise instructed, during the course of the trip
- Completing service logs accurately and making them available to Easter Seals within 5 days after the end of the month.
- Completing mileage reimbursement forms accurately and making them available to Easter Seals within 15 days after the end of the month

VOLUNTEERS

Easter Seals South Florida recruits committed volunteers for all its programs. Volunteers are recruited through volunteer recruitment fairs, health fairs, ads in the local neighbors section of the Miami Herald, announcements in churches newsletters, flyers and brochures are placed in high schools, referrals by Senior Employment Programs, caregiver referrals, posting in Volunteermatch.com, Easter Seals website and other volunteers

Selection Criteria

Volunteers must be at least 11 years old, physically and emotionally able to perform the duties assigned, and pass a background check.

Volunteers performing Transportation Escort services must be at least 21 years old, free from communicable disease, and pass a criminal background check and drug-screening test. Volunteers providing escorted transportation in their personal vehicle will go through a driving history check. The volunteer driving record must comply with Easter Seals eligibility criteria for employed drivers. If the volunteer uses his/her personal vehicle in the provision of Transportation Escort service, the vehicle must meet state safety requirements.

Transportation Escorts/Drivers will indicate in the application their availability, distance and geographic area. A volunteer may refuse any assignment.

Application Process

The Easter Seals South Florida volunteer application process includes:

- Initial Screening by the Volunteer Coordinator
- Interview with the Home Services Coordinator or the Program Director
- Completion of a Volunteer application form
- Complete notarized affidavit of good moral character
- Complete authorization to conduct background check
- Provide a medical clearance certificate
- Attend an Orientation meeting
- Provide copies of valid identification

Volunteers desiring to become AmeriCorps members, additionally, will:

- Complete AmeriCorps Application
- Provide documentation of US legal residence or US citizenship status.
- Complete a W-4 form
- Provide two personal references from non-relatives
- Sign a one-year contract to perform 450 hours during the year.

Volunteers or AmeriCorps members, who provide Transportation Escort services, additionally, will:

- Complete a Volunteer Driver Application
- Complete a W-9 form, if not an AmeriCorps member

- Provide proof of valid automobile insurance including copy of policy indicating level of coverage.
- Provide proof Valid driver's license
- Sign authorization for Driving Record Check

An orientation meeting is scheduled after completion of all appropriate forms and background checks.

Following review of the completed application and background checks, applicant will be contacted for orientation and provided with assignments(s).

DRIVER TRAINING

All SENIOR ESCORT PROGRAM volunteer drivers will undergo training, including, but not limited to:

1. Transportation Solutions for Seniors
2. The Aging Process
3. Alzheimer's disease-Certification Training
4. Body Mechanics
5. Emergency Procedures
6. CPR & First Aid Training
7. Community Resources
8. Diversity Issues/Cultural Competence
9. Conflict Resolution
10. Stress Management
11. Epilepsy and related seizure disorders
12. HIV & AIDS
13. Policies & Procedures
 - Rules of Conduct
 - Grievance Procedure
 - Time Sheets
 - Drug Free Workplace Act
 - Expense Reimbursement
 - Sexual Harassment
 - Travel Policy and Procedures
 - Living Allowance
 - Mileage Reimbursement
 - Prohibited Activities

Procedures for Providing Services

1. AmeriCorps Volunteer Escort drivers will arrive at client's house within 5 minutes of the schedule arrival time.
2. Client will never be left unattended.
3. Arrival and departure times are verified by Home Services Coordinator through random checks.

4. Schedule changes can only be made after authorization has been obtained from Home Services Coordinator.
5. Any schedule changes originating from the participant will be informed to the AmeriCorps Volunteer Escort by the Home Services Coordinator.
6. Schedule changes will be documented in the client's file and the reason for the change.
7. If a schedule change is made a new service authorization is generated and signed by the Home Services Coordinator.

8. If AmeriCorps Volunteer Escort cannot provide service to the caregiver or client he/she must communicate with the supervisor at least 24 hours before scheduled arrival time so that another worker can be assigned in ample time as to not disrupt service expectations.

LIST OF AUTHORIZED ACTIVITIES

- a. Facilitate the preparation for trip
- b. Escort client to and from vehicle
- c. Ensure safety at all times and Provide transportation services requested by client
- d. Remain with the participant as per the activities plan

ESCORT Program Dispatching Procedures

The following procedures will assure a timely and efficient execution of all aspects of the SENIOR ESCORT PROGRAM:

1. Individuals needing transportation call the Adult Day Services SENIOR ESCORT PROGRAM number 305-547-4721.
2. Reservations for rides should be made **at least 48 to 72 hours in advance** of need.
3. The Home Services Coordinator completes a ***Request for Transportation form*** [see appendix] for each service request to ensure that all needed information is collected.
4. The Home Services Coordinator reviews information with caller to ensure accuracy.
5. The Home Services Coordinator will match the request with an available volunteer driver, if possible.
6. The Home Services Coordinator will:
 - a. Contact the volunteer driver to confirm availability
 - b. Give the volunteer driver the name, address, phone number, and other pertinent information to the volunteer driver.
 - c. Call to confirm trip details with Senior participant
 - d. Provide the senior participant with an emergency contact phone number for any changes in service request.
7. If the volunteer escort needs to cancel a transportation request the following procedures should be followed:

- a. Call the Home Services Coordinator immediately at (305) 547-4721 to cancel the service order.
 - b. If the Home Services Coordinator is not available, call the Program Director at the same number.
 - c. If the event happens during the weekend or after working hours, call the senior participant and leave a message at Easter Seals.
 - d. We request that any cancellation be done as soon as possible so that Easter Seals has sufficient time to find a substitute escort.
8. In the event the senior participant must cancel, he/she will call the Easter Seals office 305-547-4721 immediately so that Easter Seals can inform the volunteer escort of the cancellation.
 9. Rescheduling a cancelled trip might require 48 hours in order to find a replacement volunteer.
 10. If for any reason, the volunteer escort is delayed, he/she **MUST** call the Home Services Coordinator at 305-547-4721 and Easter Seals will call the senior participant to reassure him/her that the volunteer driver is coming with an estimated time of arrival or that other arrangements have been made.
 11. If the senior participant is not there when the volunteer Escort driver arrives, he/she **MUST** immediately notify Easter Seals South Florida.
 12. If the senior participant is in distress when the volunteer Escort driver arrives, he/she **MUST** immediately call 911 and then call their immediate supervisor at Easter Seals.
 13. When picking up passengers, the volunteer Escort driver will be required to wear a name tag and be prepared to show identification should the senior participant request it.
 14. When picking up passengers and upon reaching the destination, the volunteer escort driver will offer any assistance necessary for the safety of the passengers. Physical lifting or other strenuous assistance, however, is not required.
 15. All volunteer drivers and senior participants **MUST** wear seat belts at all times.
 16. Upon reaching the destination, the volunteer Escort driver will:
 - a. Thank the senior participant for using the SENIOR ESCORT PROGRAM
 - b. Remain with the senior participant if indicated in the Activities Plan.
 - c. Confirm arrangements for their return trip.
 17. Following each assignment, the volunteer Escort driver will:
 - a. Complete the ***AmeriCorps Service Log form***, including name(s) of senior participants, time of departure, hours spent per trip, origin, destination and time of arrival to destination and time of return to point of origin.
 - b. Sign the Service Log
 - c. The senior participant or the caregiver's signs the Service Log Form to confirm that the service was provided.

- d. The volunteer Escort driver will complete the ***Travel Reimbursement Voucher Form***.
 - e. The volunteer Escort driver **MUST** submit these forms to Easter Seals South Florida in order to receive mileage reimbursement.
 - f. Call their immediate supervisor at Easter Seals to report completion of service.
18. Home Services Coordinator will record outcome of each request for transportation (i.e., trip was completed, canceled, or unable to be filled) on the ***Request for Transportation form***. (See appendix). This information will help Easter Seals South Florida identify unmet needs and look for ways to meet those needs.
19. Following the first three months of service, the volunteer escort and the Program Director evaluate the volunteer's to confirm that it is mutually satisfactory.
20. Every effort is made to provide each volunteer with assignments that are geographically, schedule and language appropriate. In the event that the volunteer escort is not satisfied with the assignment, volunteer escorts may be reassigned to other participants or other volunteer opportunities,.

Vehicle Inspections

- The vehicles used by the volunteer escort in the provision of escorted transportation must meet state safety requirements.
- Volunteer escorts are expected to conduct a daily self inspection utilizing the self inspection check list attached as an appendix to this manual
- Volunteers should take vehicle for inspection to an appropriate professional at a minimum every six months. It is recommended that the professional sign off on the Vehicle Inspection Form. See appendix

Incident Reporting

- Any problem encountered by a volunteer driver **MUST** be reported to the Easter Seals South Florida office as quickly as possible. Problems may include but is not limited to any form of conflict, harassment, misunderstanding, accident, unusual client illness, condition or concern.
- In the event of traffic violation or accident, the volunteer driver **MUST** immediately call the police and then notify the immediate supervisor at Easter Seals South Florida 305-547-4721.
- The volunteer escort/driver must remain with the participants at all time. In the event of an injury, the volunteer driver will accompany the senior participant to the emergency room, until he/she is relieved by an Easter Seals staff or a family member.
- Within 24 hours the volunteer escort/driver will complete and incident reporting form which will be filed. See appendix

Participant and Escort Relationship

- The relationship between the participant and the volunteer escort/driver will remain a professional one at all times.
- The volunteer escort/driver will not provide the participant or the caregiver with his/her personal phone numbers or addresses.
- The volunteer escort/driver will not transport the caregiver or client in his/her personal vehicle under any circumstances.
- The volunteer escort/driver will not accept any gifts regardless of the value from the caregiver or participant.
- The volunteer escort/driver will not manage any money for the caregiver or participant without prior authorization from the Home Services Coordinator.

Confidentiality

- In accordance with HIPPA regulations' regarding privacy any and all information regarding senior participants is to be kept in strictest confidence. All volunteers must sign a confidentiality agreement and abide by Easter Seals South Florida Confidentiality Policy.

Metropolitan Family Service

Volunteer Description

Program: Project Linkage

Position: Shopper/Escort

Program Description: Project Linkage helps older adults and people with disabilities remain independent in their own homes by linking them with volunteers who provide in-home support and transportation services. Project Linkage has served older adults and people with disabilities in the community since 1980.

Position Description: As a Project Linkage Shopper or Escort, you will most likely be making it possible for an older adult to remain in their own home and receive adequate nutrition. Volunteers shop for or with clients: Shoppers can transport and assist clients, or shop for the client by using a list given to them by the client; Escorts accompany a Project Linkage bus trip and assist clients with their shopping.

Time Commitment: Time commitment is flexible and variable. Generally about four to eight hours a month. Daytime, evening or weekend hours available. Some clients like to shop once a week, others less often.

Responsibilities: Review lists with client to make sure they get what they need. If needed: help read labels, push cart, carry grocery bags, compare prices. Grocery shopping volunteers do not pay for groceries—all bills must be paid by the client.

Qualifications: Must be at least 18 years of age unless accompanied by an adult. Patience, honesty, good organizational skills, willingness to abide by money handling policies of Metropolitan Family Service. If transporting clients, must be at least 23 years of age with five years driving experience; must have dependable vehicle, adequate insurance, and good driving record.

Supervision & Training: Project Linkage orientation is provided prior to service. Additional training through Ride Connection must be completed within six months of becoming a volunteer driver; this includes eight hours of Mobility Assistance Awareness and Defensive Driving.

For more information: Contact Metropolitan Family Service at 503.249.8215, ext.22

Project Linkage is a program of Metropolitan Family Service. MFS is dedicated to building stronger communities by providing services, connecting people with resources, and offering volunteer opportunities throughout the Portland area.

Because together, we can do more.

RIDE CONNECTION OF OREGON

Adapted from: www.RideConnection.org

VOLUNTEERING

Overview

Make a Community Connection

Ride Connection works closely with its community partners to provide alternative transportation for seniors and people with disabilities. Volunteers strengthen our network with their caring interaction with people. We can accomplish more as a community than we can as individuals. With such a wide range of service options, we are able to provide an array of volunteer opportunities. We invite you to join us, and share your skills and talents. Together we can build mobility and independence for seniors and people with disabilities: linking accessible, responsive transportation with community need. Ride Connection invites you to volunteer! Every day, Ride Connection volunteers make a difference in our community.

Volunteering

Imagine four counties: Multnomah, Washington, Clackamas and Clark. Now, think of each dwelling of each rider that Ride Connection serves, and each destination that we drive to. Imagine bright lines on a map that connect them all. Whether you picture someone's home in a house, apartment, retirement facility or assisted living facility; whether the rider is from the inner city, a suburban area or a rural community, each one is important, each one is counting on us. You can be part of the "Mobility Fleet" of volunteers who provides caring service to people who really need it. Join Ride Connection's "Mobility Fleet!" You can volunteer to drive in your Portland metropolitan area community.

Volunteer Driver

- SW or NW Portland area volunteer driver
- SE Portland area volunteer driver N or NE Portland area volunteer driver
- East Multnomah County volunteer driver
- Washington County volunteer driver
- Clackamas County volunteer driver
- Clark County volunteer driver

Drive your own vehicle or a Ride Connection community partner's vehicle. By volunteering to drive, you give the gift of mobility to a senior or disabled neighbor. You will provide door-to-door transportation with flexible hours. Our community partners work with you to create a schedule that works. Less time available? Volunteer to join our driver pool. Two kinds of driver pools are available:

- Special event driver. Drive for special events such as Holiday Lights and weekend field trips. You can schedule this volunteer opportunity in advance.

- Fleet maintenance pool. Drive a vehicle for required service appointments. A flexible schedule is available.

Volunteer Driver requirements:

- Volunteer application
- A good driving record (DMV check is required)
- A criminal history check is required
- Possess a valid driver's license with a minimum of five years licensed driving experience
- Patience and flexibility
- Approximately 1/2 day per week is requested
- Training is required. Ride Connection provides the necessary training
- Ride Ambassador

Volunteer to show new riders how to become more independent using public transportation. Join a group of people who are interested in mobility and independence for seniors and people with disabilities. We invite you to get involved!

Ride Ambassador volunteer requirements:

- Experience riding bus and light rail
- Volunteer application and three references
- Interview with Ride Connection's Volunteer Recruiter/Coordinator
- Criminal background check with fingerprinting
- Six hour training provided by Ride Connection

Ride Connection office volunteer

Volunteer in Ride Connection's office. Help with quarterly newsletter mailings, assist with data entry or help with a special project. Office hours are 8:30 am until 5:00 pm, Monday through Friday.

Intern/Service Learning/Practicum students

Ride Connection welcomes interns, practicum students and individuals involved with service learning. Prospective volunteers meet individually with Ride Connection's Volunteer Recruiter/Coordinator to determine the best placement. Please consider Ride Connection for your student learning experience.

Trainer

If you're comfortable in front of a group, consider volunteering as a trainer. Teach defensive driving or mobility awareness classes or orient drivers and escorts on vehicle operations and wheelchair securement. Training is required and provided by Ride Connection. A minimum six-month commitment is requested.

TRAINING

Overview

A key component of our mission is to provide training and technical assistance to all that are providing service through the Ride Connection network; staff, drivers, escorts, and service providers. It is the role of the drivers, escorts, Ride Connection staff and service providers to provide safe reliable service to our customers. Quality trainings that are specific and appropriate to the needs of all are imperative.

In addition we offer customer training and support for seniors and people with disabilities that are interested in accessing the bus, light rail and other alternative transportation options.

Staff

Ride Connection encourages staff to participate in supplemental and required training opportunities that provide the tools and skills to perform at the highest level.

Driver

Ride Connection is committed to ensuring that all customers receive a safe ride each and every trip. To achieve that commitment we ask our drivers to meet rigorous standards including ongoing training. All drivers, whether paid or volunteer, must be fully oriented to the vehicle(s) they drive, road tested to confirm competent driving skills, and attend both a defensive driving class and a passenger assistance class every three years. Any incidents, even minor ones, are monitored and retraining is provided to individual drivers as necessary.

Safe Driver Incentive Program

Safe driving is an essential component to the Ride Connection mission of "linking accessible, responsive transportation with community need". Above all else, our riders expect to get to and from their destinations safely. The Safe Driver Incentive Program honors and rewards our drivers who make these safe rides happen every day.

The goals of the Safe Driver Incentive Program are twofold:

1. To promote safety awareness
2. To recognize drivers for their safe behavior

The criteria for being considered for the Safe Driver Incentive Program are:

- The driver has had no accidents, convictions or violations while driving for Ride Connection in the past three years.
- The driver is up-to-date on all trainings as of the end of the fiscal year (June 30).
- The driver has been an active driver for at least one year, with no inactivations on his or her record during the fiscal year.

Last fiscal year, 220 out of nearly 700 drivers fit these criteria, and we expect just as many (if not more!) each year of the program. Each year these incentive award-winning drivers are entered into a drawing and three drivers' names from each county we serve are drawn to receive a grand prize. Everyone receives a certificate of appreciation and gets an invitation to the Safe Driver Recognition event we hold each year.

Service Provider

The training department works with individual service providers to develop site-specific training and technical assistance addressing the needs of their particular drivers. In addition, service providers are required to attend a monthly Quality Improvement Committee meeting where they are given information about a wide range of safety topics, including updates on current traffic laws, seasonal driving tips, and ideas to ensure passenger comfort and safety.

Customer

By providing information and assistance on transportation choices, personal trip planning and assistance in learning how to ride the regular buses and MAX trains, the Ride Connection customer trainings helps build the confidence and skills to use all transit options available.

Staff

Personnel Training and Development

Ride Connection offers in-service training opportunities for all employees through all-staff meetings, department meetings and internal trainings. Ride Connection also encourages employee participation in courses, seminars and workshops offered by Ride Connection and other organizations.

Required Trainings

Drug and Alcohol for Safety Sensitive Personnel

This 60-minute session is designed to meet the requirements mandated by the Department of Transportation for safety sensitive personnel. The goals of this class are to educate the employee of effects and consequences of prohibited drug use on personal health, safety and the work environment and on the signs and symptoms, which may indicate, prohibited drug use. Additional information is distributed on community service help lines for employee assistance.

Drug and Alcohol Reasonable Suspicion Training for Supervisors

This two-hour session is designed to meet the requirements mandated by the Department of Transportation for supervisor training. The goals of this class are to educate the supervisor in the understanding of drug and alcohol regulations that apply to reasonable suspicion testing, to know the physical, behavioral, speech and performance indicators of substance abuse, to be able to approach an employee with your concerns in a professional and rational manner, to complete documentation and initiate reasonable suspicion testing and follow up.

Customer Service Training

This course assists participants in learning specific skills needed to build and improve customer service. Information is provided on communication skills, helpful techniques to use with difficult customers and to better understand the special needs of customers.

The Training department can work with staff to develop training on a variety of topics when the need arises.

RideAlong

Each summer, Ride Connection staff and board join together for the annual "RideAlong". The purpose of the RideAlong is to thank our customers for riding with us. Staff and board members ride along with customers, interact with them, and ask how Ride Connection has helped them keep their mobility and independence. Ride Connection staff and board members have the opportunity to stay more connected with the people we serve, as well as learn about our community providers. We consider this a valuable part of our staff training, because our learning in the field helps us understand service from our customers' viewpoint.

Driver

Drivers who provide transportation for the community are held to a higher standard than any other driver on the road. Ride Connection requires specific training programs for all drivers operating vehicles or providing transportation services as part of the Ride Connection network.

The following trainings are required to be taken by drivers, including those who drive agency vehicles, shared vehicle relationships and those driving their own personal vehicles.

- Program Orientation
- Vehicle Orientation with Wheelchair Securement and Road Experience
- Mobility Awareness and Assistance Program
- Defensive Driving (*Safe At Any Age*)
- FTA and FHWA Drug and Alcohol Training (as required)

In addition to the required trainings, Ride Connection recommends customer service training

Required Trainings: Program Orientation

This training covers all aspects regarding the provider agency's policies (i.e. mission, values, job description, donation policy, code of conduct, etc.).

Vehicle Orientation, Wheelchair Securement and Road Experience

This behind-the-wheel training must be completed prior to transporting customers. Ride Connection trains program representatives to perform this training and testing. Ride Connection is also available to perform driver training/testing.

Mobility Awareness and Assistance Program

A four-hour course offered to program drivers and escorts involved in special needs transportation. This course is designed to provide drivers and escorts with a basic understanding of some of the physical and psychological disabilities that may affect their riders and offer tips to assure a positive experience for all involved.

Safe at Any Age Defensive Driving Training

A six-hour defensive driving course offered by Ride Connection as part of the training program for drivers involved in special needs transportation. This course is designed as a two-part program for safe drivers who have years of driving

experience. It gives drivers the opportunity to learn about the effects of aging and how these natural changes may affect their driving, techniques to help offset physical changes related to aging and is a review of defensive driving techniques. This course is certified with Oregon's Department of Motor Vehicles as an insurance discounted course.

Part I: Safe Driving Practices and the Aging Process, describes the physical factors that may affect driving ability and how we can compensate for the normal effects of aging.

Part II: Putting on My Other Hat, is a review of the basic defensive driving skills used to avoid collisions and maintain excellent safety.

Note: This course can be taken as a four-hour defensive driving class only.

Drug and Alcohol for Safety Sensitive Personnel

This 60-minute session is designed to meet the requirements mandated by the Department of Transportation for safety sensitive personnel. The goals of this class are to educate the employee of effects and consequences of prohibited drug use on personal health, safety and the work environment, and on the sign and symptoms, which may indicate, prohibited drug use. Additional information is distributed on community service help lines for employee assistance.

Drug and Alcohol Reasonable Suspicion Training for Supervisors

This two-hour session is designed to meet the requirements mandated by the Department Transportation for supervisor training. The goals of this class are to educate the supervisor in the understanding of drug and alcohol regulations that apply to reasonable suspicion testing, to know the physical, behavioral, speech and performance indicators of substance abuse, to be able to approach an employee with your concerns in a professional and rational manner, to complete documentation and initiate reasonable suspicion testing and follow up.

Other Available Trainings

Customer Service Training

This course assists participants in learning specific skills needed to build and improve customer service. Information provided on communication skills, helpful techniques to use with difficult customers and to better understand the special needs of customers.

VOLUNTEER ESCORT REQUEST FORM
Elder Services of Merrimack Valley

Elder's Name: _____ **Age:** _____ **ID #** _____

Elder's Address w/ Town: _____ Tele # _____

Emergency Contact: _____ Phone # _____

Directions: _____

Requested By: _____ Ext. _____ Date: _____

Elder's diagnosis: _____

Special considerations: _____

DESCRIPTION OF ELDER

Alert _____	Angry _____	Independent _____
Oriented _____	Hearing Impaired _____	Dependent _____
Confused _____	Vision Impaired _____	Wheelchair bound _____
Friendly _____	Ambulatory _____	Uses Walker/Cane _____
Reserved _____	Accepting _____	Isolated _____

ANTICIPATED ROLE OF VOLUNTEER

Companion to elder _____	Outing with elder _____
Meal preparation _____	Shopping/ Errand for elder _____
Medical Advocacy _____	Yard/ House Work _____
Read/Sort Mail _____	Make grocery list _____
Read to elder _____	Respite For Caregiver _____
Other: (specify) _____	

VOLUNTEER ESCORT REQUEST FORM
Elder Services of Merrimack Valley
(page 2)

TIMES PREFERRED

No preference _____ Weekend _____ Weekday _____ Evening _____

Volunteer Assigned: _____ Phone (H) _____ (W) _____

Date Filled: _____ CM Orientation : _____

Elder Services of Merrimack Valley
Friend in Deed -Volunteer Shopping Program

Program Objective: To utilize Friends in Deed/Shoppers as an integral part of our agency's efforts to increase the availability of services to clients. This program is of tremendous importance in allowing our agency to better meet the needs of our clients, given existing budgetary constraints and shortages of direct care workers.

Who do ESMV Volunteers Serve:

1. Clients in our State funded Home Care Program whose shopping needs would be best met by a volunteer. This may be due to a lack of available direct care staff (Homemakers) or budgetary limitations on client services.
2. Elders who are not clients of ESMV may also be referred to the program at times.

Communication with ESMV: All active clients of Elder Services have a Case Manager who is responsible for the creation and monitoring of client service plans. Any questions or concerns regarding clients should be expressed to that client's Case Manager. If the Case Manager is not in the office at the time of your call, ask to speak with the Help Desk and they will take any needed actions, and/or follow up with the Case Manager when they return to the office. Any questions or concerns about the Volunteer Shopper Program in general, or notification of a Friend in Deed/Shopper's vacations or change in availability should be communicated to the Program Manager.

Client Referral Process: Case Managers will provide the Program Coordinator with the client's information. The Program Coordinator will match the client with a Friend in Deed by geographic area and availability. The Case Manager will continue to be the liaison informing the volunteer of any changes in the clients' status (hospitalizations, etc.) Once a match has been identified the Case Manager will contact the client to give them the name of the Friend in Deed/Shopper and let them know the volunteer will be contacting them. Arrangements can be made for the Case Manager to be present at the first meeting of the client and the volunteer if this need is identified by the Case Manager or the Friend in Deed/Shopper.

General Friend in Deed/Shopper availability information: Matches will be made based on the geographic availability of the volunteer. ESMV's coverage area includes all 23 cities and towns of the Merrimack Valley. Friends in Deed/Shoppers should also inform the Program Manager of any particular requests they have in regard to placement with clients, such as non-Smoking clients only, etc.

Volunteer Commitment: Volunteers should plan to spend approximately 2 hours per week for each client they shop for. Some clients may only require

shopping every other week. The schedule for shopping will be set up directly between the client and the Volunteer. Any weekly schedule changes should be communicated directly to the client. Vacation coverage will be coordinated by the Program Manager, some clients may be able to skip a week of shopping if the shopper stocks up with week before.

Friend in Deed/Shopper Observations: Volunteers will notify client's Case Manager or the 'Help Desk' as soon as possible if they suspect a change in clients' health status or have any other client related concerns. Case Managers and the Help Desk can be reached by calling the main office **978-683-7747 or 1-800-892-0890**. The 'Volunteer Care Record' should also be completed and submitted.

Reporting information: All Friend in Deed/Shopper activities must be recorded and submitted on the 'Volunteer Care Record' form. These completed forms must be sent into the office at the end of each month along with mileage sheets. These vital records are shared with the Case Managers.

Easter Seals South Florida
Senior Escort Program
Volunteer Confidentiality Agreement

As a volunteer of Easter Seals South Florida, Inc., I understand that I must abide by the following policies which assist in maintaining the participant's right to privacy and confidentiality in all matters related to his/her personal life, medical care and client services.

I will not:

- Obtain information, which I do not need in order to carry out the duties and responsibilities of my service.
- Communicate information to any person who does not need it for the same purpose. (See preceding statement)
- Assist others in obtaining confidential information.
- Discuss the participant's affairs in public areas such as the dining room, hallways, elevators, or off the Easter Seals South Florida premises.
- Seek out and/or disclose irrelevant or embarrassing facts about any client.

I understand:

- These policies, which include, but are not limited to the specific examples above, apply to all participants and all employees; that any action, which violates the spirit of the participant confidentiality policy, will be dealt with in the same manner.
- Breaches of confidentiality are matters of serious consequences that may harm participant care, slander a participant and his/her family, or lead participant's physicians, or others to not choose Easter Seals Services for the services they need.
- That violation of any of these policies may result in my termination from volunteering, and disciplinary action may be taken without previous warning.

Also, as a volunteer of Easter Seals South Florida, Inc., I understand I must abide by these confidentiality policies and that I may be subject to state and federal criminal penalties related to slander or breach of confidentiality.

Name (printed) _____

Signature _____

Witness _____

Date _____

Elder Services of Merrimack Valley Procedure for Friend in Deed/Shopper

- A. Before you go shopping, pick up the shopping list and the money from the client. Depending on the client, the volunteer may assist in preparing the shopping list if needed. **Note:** This is recommended for the initial shopping outings to establish a level of trust between the client and the volunteer shopper. If it is agreeable to both parties, the most practical process should be used.

- B. Separate the clients shopping items from your own (volunteers) items. Volunteer should pay for the client's items with the client's money, and obtain a receipt of the client's specific items.

- C. Both the client and the volunteer shopper should review and confirm the shopping list with the clients receipt. Next, confirm the change on the receipt and the actual change (returned to the client by the volunteer) is the same. Both the clients and the volunteer shopper should initial this receipt.

- D. The initialed receipts should be kept in an envelope in the client's home. Preferably in the kitchen or on top of the frig.

- E. We recommend you not purchase alcohol or cigarettes. We recommend using good judgment when asked to purchase other non-essential items such as lottery tickets, etc.

- F. Record all visits on your 'Volunteer Care Record' – submit monthly – completing form for each client separately. Use 'Mileage Sheet' to track -date of service, client information, destination, hours worked, miles traveled. Submit all forms by the 10th day of the next month.

Elder Services of the Merrimack Valley, Inc.
Choices for a life-long journey

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Elder Services of the Merrimack Valley, Inc.
Choices for a life-long journey

OUR MISSION...

To insure that choices of programs and services are available and accessible to meet the diverse needs and changing lifestyles of older adults.

Elder Services of the Merrimack Valley, Inc.
Choices for a life-long journey

OUR VALUES...

We believe in home based care, community services and supportive living programs maintain the dignity of human life by promoting self-determination and by encouraging the maximum independence of the people they are designed to serve.

What is a Medical Advocate?



Medical Advocate.....

is a trained volunteer who drives and accompanies an elder to a physician appointment, treatment or other medical event and act as an advocate for that elder during the appointment.

Medical Advocate Training (part1)

- Overview of the Aging Process
- Infection Control and Hand washing
- Guidelines for Building Positive Relationships
- Listening Skills and Assertiveness training

Medical Advocate Training (part 2)

- Confidentiality and Ethics-HIPAA
- Role of the Medical Advocate
- Guidelines for Reducing Risk on Volunteer Assignments
- Procedures for Medical Advocacy
- Dealing with Relationships and Losses

Medical Advocate Volunteers May Be.....

- Employed
- Retired
- Elders
- Non-Elders
- People with a lot of time to volunteer
- People with a small amount of time to volunteer
- Males
- Females

But they are all...people who care.

Who Should have a Medical Advocate? Medical Advocacy Targets

- Elders and their spouses
- Working caregivers
- Long distance caregivers
- Elders who have difficulty communicating with their doctors and/or have trouble remembering doctor's instructions
- Elders who are facing a new diagnosis and/or are overwhelmed with doctor's appointments

The Aging Process Issues You May Encounter

Vision Loss
Hearing Loss
Dementia

Common Indications of Vision Loss

- Inability to see well in dim light
- More easily blinded by glare
- Difficulty in refocusing quickly from near to far
- Difficulty seeing differences in color, contrast or in 3 dimensional surfaces
- Difficulty following moving objects

Assisting Elders who have Visual Impairments

- While the vehicle is in motion, announce upcoming stops
- Offer your arm
- Do not raise your voice (this is common)
- Identify yourself by name when you approach a person who is visually impaired
- Giver verbal directions, do not point

Common Indications of Hearing Loss

- The person always turns up the volume on the tv or radio
- The person often asks to have information in a conversation repeated
- The person misunderstands what others say
- Conversations become difficult

Assisting Elders who have Hearing Impairments

- Make eye contact or get the person's attention some other way before speaking
- Don't shout, raise the volume of your voice but not the pitch
- Reduce confusion by turning down the TV or other background noise
- Stand near the person when you talk to them, don't shout from another room

Common Indications of Dementia

- The person becomes lost or disoriented
- The person becomes accusatory and aggressive or unable to make decisions
- The person repeats things often
- Personal hygiene is being neglected, soiled or inappropriate clothing is worn

Assisting Elders with Dementia

- With confused people, use short, simple adult statements, one message at a time
- Do not shout, or people will think you are angry
- If confusion starts suddenly, a doctor should determine the cause as confusion can also be caused by heart problems, medications or depression

Infection Control and Hand Washing (hand out)



Building Positive Relationships

- Ten Principles of Good Listening
 1. Stop talking. You cannot listen while you are talking.
 2. Put people at ease. Help others feel free to talk by creating a “permissive environment.”
 3. Show that you are ready to listen.

Ten Principles of Good Listening cont.

4. Remove distractions. Don't doodle, tap or shuffle papers while others are talking. Turn down the radio or TV and shut the door, if necessary.
5. Empathize. Try to put yourself in their place, so that you can see their point of view.
6. Be patient. Allow plenty of time. Do not interrupt. Don't move toward the door or walk away until they have finished talking.

Ten Principles of Good Listening cont.

7. Keep your temper under control.
8. Avoid argument and criticism. This puts others on the defensive.
9. Ask questions.
10. Stop talking. This is the most important principle, because all of the other principles depend upon it. You just can't be a good listener while you are talking.

Assertiveness Tips for Volunteers

- It's ok to say "no" to others and repeat it if it isn't heard the first time. It isn't necessary to offer excuses or justifications for saying "no."
- Don't say "yes, I'll do it," when you want to say "no, I am unable to do it." If you are not careful and truthful about your feelings, you will become frustrated with your assignment. Your assignment will become a chore instead of a joy.

Medical Advocate Special Activity

Walking in Their Shoes

HIPPA

- Refer to handout



The Medical Advocate will...

- Assist the elder in preparing and asking appropriate questions
- Record the information given to the patient by the physician/office staff
- Report information to caregivers
- Coach, support, and empower the elder to be in charge of their own health care during the visits and treatments

Medication Record

Name of drug	What it's for	Color/shape	Date started	Doctor	Dosage	Instructions

Do's and Don'ts For Reducing Risks on Volunteer Assignments (hand out)



Volunteer's Have the Right To:

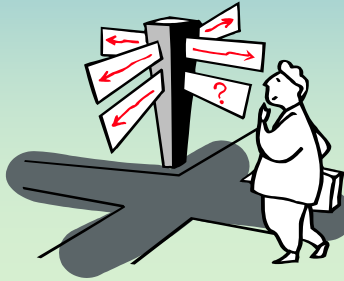
- Information about the older person, primary caregiver and family with whom they will be working.
- An orientation and ongoing training to prepare them for their volunteer support caregiver assignment.
- Respect from the older care recipients, primary caregiver and family and the assigning organization.

Volunteer's Have the Right To: cont.

- Work in situations that are not hazardous to their well-being.
- Receive feedback on the effectiveness of their work to enable them to improve their abilities to help others.
- Not to disclose their home address or phone number to the care recipient, the primary caregiver or family.

Volunteer's Have the Right To: cont.

- Sound guidance, direction, support and appreciation on a regular basis from the organization's volunteer coordinator and program staff.



Important Aging Trends

- By the year 2050, more than one of every five people will be 65 or older.
- At that time, 20% of the U.S's population will be comprised of older adults.
- By 2025, there will be nearly 500,000 centenarians
- And by 2055, about 1.3 million!

Trends In Volunteerism

- Volunteers have increasing demands on their time because most are employed.
- Nearly all volunteers need flexibility and find it difficult to commit to regular hours.
- More volunteers are looking for short term (episodic) volunteer opportunities.

Trends In Volunteerism cont.....

- People are interested in working for causes, not just for organizations.
- There are many more people with professional skills available to community nonprofit organizations than in the past.
- Business leaders who want to move from Success to Significance!

The End...
Thank You

Congratulations on
Completing the Medical
Advocacy Program
Training!!!!!!

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