

# Action Planning for Evaluation

*Planning, Recruitment, Training, Retention,  
Communication, and Momentum*

## GENERAL EVALUATION PLANNING

- Did you seek input and/or go to experts for operations assistance?
- Did you create and implement written volunteer driver policies and guidelines?
- Were your priorities written as policies and procedures?
- Did you develop a risk analysis plan and implement a risk analysis?
- Did you purchase insurance, and if so was it adequate?
- Did you meet and/or exceed your targets for the numbers of drivers and riders to make the program viable?
- Did you undertake a “break even” analysis for income and the delivery of rides?
- Did you select and purchase a ride scheduling and data management package?
- Did you provide training opportunities for staff to learn optimal utilization of software?

## Your Evaluation Plans

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## EVALUATING DRIVER RECRUITMENT

- Did you use or adapt your strategy for volunteer driver recruitment and retention?
- Did your screening and recruitment messages appeal to drivers? If not, did you create new ones?
- Were you able to identify messages that appealed to volunteers and passengers? If so, how do you know?
- Were you able to identify types of people who volunteered to drive? If so, did they volunteer to drive for your program?
- Were you able to identify time commitments that appealed to potential drivers? If so, did it make a difference in your ability to recruit new drivers?
- Were your recruitment materials (and or revisions) effective in recruiting volunteer drivers. If yes, how do you know? If no, did you or will you revise them?
- Did you identify organizations in the community for assistance in recruitment?
- Were your driver recruitment venues effective for recruiting drivers? Do you plan to expand your venues in the future?
- Were you able to post announcements in strategic locations? If not, will you do so in the future? If so, do you expect to expand the locations in the future?
- Did you use PSAs for announcing your program? If not, do you expect to use them in the future. If so, will you expand their use in the future?

- Did you present recruitment programs to community groups? If so, how many, and will you continue to present them? If not, will you do so in the future?
- Did you create and organize a volunteer driver screening plan? If so, was it successful? If not why, and will you do it in the future?
- Did you plan and implement a volunteer driver orientation plan? If so, was it effective and how do you know? If not, will you create and implement one in the future?

**Your Evaluation Plans for Driver Recruitment**

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**EVALUATING PASSENGER RECRUITMENT**

- Did you identify people who need rides and create recruitment messages?
- Did you revise and implement your recruitment strategy?
- Did you develop screening criteria and create passenger recruitment messages?
- Did you create and post passenger recruitment materials?
- Did you create a list of locations for recruiting riders?
- Did you identify and work with community organizations to assist in recruitment?
- Did you use PSAs for announcing transportation options, and if not, why?
- Did you post announcements in several strategic locations?
- Did you develop criteria and use it for screening passengers?
- Did you develop a plan and organize orientation programs for passengers?

**Your Plans for Evaluating Passenger Recruitment**

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**EVALUATING DRIVER TRAINING**

Identify and/or develop/create a driver training method that involves information about driving, about assisting riders, and about the volunteer driver program.

- Did you plan and initiate volunteer driver training?
- Did you identify training methods and create or access appropriate materials?
- Did you develop and implement volunteer driver training requirements (e.g., required background checks and training protocol)?
- Did you develop and distribute a driver handbook that includes training requirements and related materials, job descriptions, program descriptions, etc.?
- Did you plan and initiate “big picture” driver orientation programs?
- Did you create a written plan for driver training and implement the plan?

## Your Plans for Evaluating Driver Training

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### EVALUATING PASSENGER AND DRIVER RETENTION

- Did you develop and distribute information that enables passengers to understand eligibility for receiving rides and how to schedule them?
- Did you develop and revise criteria for passenger retention? If so, were you able to retain passengers?
- Did you explore incentives for drivers' use of their vehicles for providing transportation? If so, which incentives (if any) did you implement?
- Did you identify ways to respect volunteer driver needs in scheduling rides?
- Did you identify ways to keep the workplace cheerful? If so, did you implement them?
- Did you plan and organize an annual volunteer driver recognition program?
- Did you develop and implement a method for ensuring adequate driver orientation and training?
- Did you develop and activate criteria for driver retention?

## Your Plans for Evaluating Driver Passenger and Driver Retention

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### EVALUATING COMMUNICATION PLANS

- Did you plan and implement a communication method or methods that will ensure regular and ongoing communication with drivers and passengers?
- Did you plan and implement methods of involving drivers who can use the internet?
- Did you plan and activate the use of multiple channels of communication with volunteers such as land lines, cell phones, text, and e-mail?
- Did you plan and activate an "open door" policy for volunteers to talk with staff?
- Did you involve volunteers in creating a location for volunteer drivers to meet with each other and with staff?
- Did you plan and implement regular volunteer driver meetings and ongoing training?
- Were you able to allow for extra time requirements for contacts with riders?
- Were you able to identify or create and distribute surveys to collect feedback from drivers and riders about their experience providing and using the transportation service?

## Your Plans for Evaluating Communication Plans

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### EVALUATING MOMENTUM PLANS

- Were your preparations for meeting requests for rides successful?
- Did you create and implement a service slogan that promoted the purpose, energy, and commitment of volunteer drivers?
- Did you plan and implement a method (e.g., “things to do today” log) to stay organized?
- Did you plan, initiate, and complete activities you expected to accomplish during the first six months of the implementation phase?
- Did you implement a method you developed for documenting feedback from riders and drivers?
- Did you plan and implement driver recruitment activities? If so, were they successful?
- Did you plan and implement passenger recruitment activities? If so, were they successful?
- Did you develop and implement a plan for communicating program accomplishments to the community?
- Did you purchase and activate software that meets your requirements for training, scheduling, and documenting rides, which can be utilized by staff for the purpose of data management and retrieval? If not, how do you plan track data?

## Your Plans for Evaluating Momentum Plans

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