Planning Checklist

Our experience suggests that planning for a volunteer driver program is, at the very least, a six-month process. This assumes a major needs assessment has already been undertaken and the decision to develop a volunteer driver program has been made. The technical assistance materials in the planning kit will enable you to do a variety of things during your six-month planning process such as:

- gain knowledge about volunteer driver programs
- identify volunteer groups and potential advisory members and service partners
- develop a risk management and insurance strategy
- plan volunteer recruitment, training, and management
- undertake one or several community surveys
- hold community meetings
- develop a business plan
- prepare a transportation options booklet for organizations and older adult consumers
- prepare a presentation about your plans for a volunteer driver program
- select a sponsor and/or advisory group

This TurnKey Kit is a dynamic package that will be expanded over time. In other words, the materials available in the 2021 roll out of the TurnKey Kit are only a sample of the materials that will eventually be available. The following checklist is intended to provide you with the full range of planning activities that you might want to consider, as well as a glimpse at the types of assistance that will eventually be available within the planning materials. The activities on the checklist fall into seven areas:

1. transportation needs assessment
2. volunteer program design
3. risk management approach
4. plans for volunteer driver recruitment and training
5. community outreach and promotion
6. funding needs and strategies
7. methods for monitoring and maintenance

1. Needs Identification

- Collect and Analyze Data
  - demographic data
  - transportation needs and services data
  - data on needs and gaps in transportation
  - information about transportation options in the community
- Involve Community Organizations and Group
  - relevant transportation and aging organizations
  - methods of providing information and encouraging involvement

2. Program Design

- Determine Purpose of Program
  - serve older adults in defined area
  - supplement existing transportation systems
  - quantity of life rides
  - quality of life rides
  - strategy for filling the transportation gaps
- Design Program Structure
  - target population
  - service area
  - reimbursement method
  - hours of operation
  - fleet size (if owned)
  - sponsoring organization(s)
  - services offered (i.e., escorts, door-through-door)
  - fees (if any)

3. Risk Management

- Review Liability Issues
  - relationship of exposure to program design
  - risk factors related to liability
  - internal insurance needs and coverage
- Acquire Insurance
  - insurance needed for sponsor and volunteers
  - insurance options and quotes
  - insurance purchase
- Develop Risk Management Materials
  - rider-screening criteria
  - driver-screening criteria
  - driver-training requirements

4. Driver Recruitment and Training

- Prepare Driver Recruitment Strategy
- Plan Driver Risk Management Strategy
- Prepare Driver Training Strategy
- Prepare Rider and Driver Information
  - rider requirements and agreements
  - driver requirements and agreements

5. Community Outreach

- Identify Community Organizations to Involve
  - faith based
  - older adult services
  - transportation services
  - other
- Develop Strategy for Involving Community Groups
  - meetings
  - information materials
  - presentations
- Plan Program Marketing and Educational Materials
  - brochure(s)
  - newsletter
  - PowerPoint presentations

6. Funding Needs and Strategies

- Identify Purposes and Methods of Acquiring Donations
  - possible funding requirements
  - possible funders
  - in-kind donations requirements
  - possible in-kind donors
- Develop Funding Proposals
- Develop Donation Letters

7. Monitoring and Maintenance

- Develop Strategy for Monitoring and Evaluation
  - evaluation criteria
  - indicators of success
  - frequency of review
- Plan Evaluation Activities
  - satisfaction surveys
  - focus groups
  - telephone inquiries
  - rider/driver data analysis
- Plan Reporting Methods
  - internal reporting
  - external reporting