

# Alternate Transportation for Seniors Webinar

Monday, June 13, 2016 at 2 p.m.

WE ARE  
economies  
OF SCALE

WE ARE THE  
support  
YOU NEED

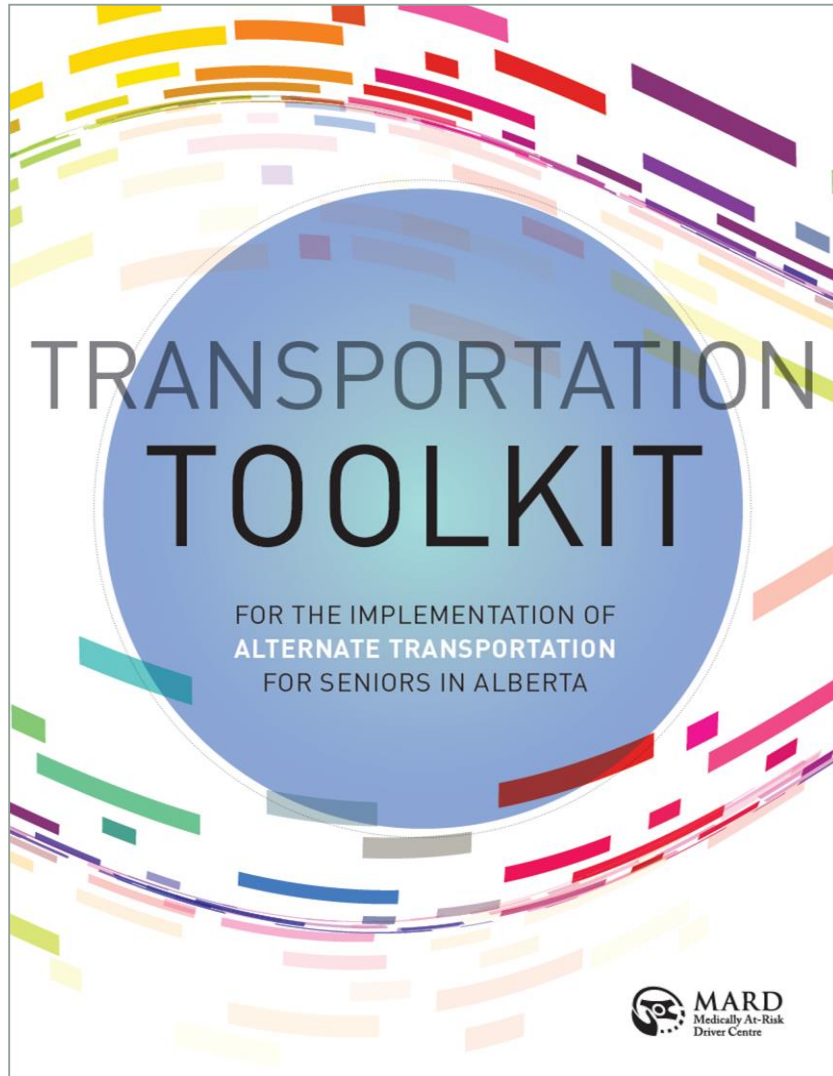
WE ARE THE  
experts  
IN MUNICIPALITIES

WE ARE YOUR  
advocate



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# Transportation Toolkit Workshop



AUMA/AAMDC Webinar  
June 13, 2016

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# Transportation Toolkit Workshop

- Funding for the development of the *Toolkit* was provided by the Ministry of Seniors and Housing, Government of Alberta

# Overall Goals in Developing the *Toolkit*

- To provide communities in rural and urban areas of Alberta with the resources needed for the successful development and implementation of sustainable, responsive models of ATS services
- To create capacity in development or expansion of ATS services in rural and urban Alberta

# Development of *Toolkit*

- Searched the literature and reviewed published literature and reports
- Utilized results and learnings from our own Projects
- Engaged stakeholders and received input
- Engaged community members via interactive workshops and received input

# MARD Centre Initiatives on Alternate Transportation for Seniors

- 2009 Survey of Edmonton Alternate Transportation Providers
- 2009 Identification of Alternate Transportation Providers in Rural and Urban Alberta
- 2010 Development of Compendium of Alternate Transportation Providers in Rural and Urban Alberta
- 2011 A National and International Scan of Existing Models of Seniors' Alternate Transportation and Identification of Unique Models and Innovative Solutions
- 2011 Provincial Survey of 901 Seniors in Rural and Urban Alberta on Perceptions and Use of Alternate Transportation
- 2011-2012 Compendium of Alternate Transportation Providers in British Columbia
- 2013 Compendium of Alternate Transportation Providers in Manitoba
- 2013 **Community Needs Assessment of Alternate Transportation in Wainwright and Area**
- 2013-2014 **Collaboration with Wainwright on Development and Implementation of Alternate Transportation in Wainwright and District**
- 2014 Analysis of Ride-Scheduling Software for Alternate Transportation Providers
- 2016 **Capital Region Board Transportation Needs Assessments**

# Toolkit

1

GETTING STARTED

2

DEVELOPING  
& IMPLEMENTING  
A PROJECT PLAN

3

CONDUCTING  
A COMMUNITY  
TRANSPORTATION  
NEEDS ASSESSMENT

4

DEVELOPING &  
SUCCESSFULLY  
LAUNCHING YOUR  
TRANSPORTATION  
SERVICE

5

RECEIVING FEEDBACK  
& EVALUATING YOUR  
TRANSPORTATION  
SERVICE

6

BUILDING A  
SUSTAINABLE  
TRANSPORTATION  
SERVICE

# Overview of Material: Sections 1-3

1

**GETTING STARTED**

2

**DEVELOPING  
& IMPLEMENTING  
A PROJECT PLAN**

3

**CONDUCTING  
A COMMUNITY  
TRANSPORTATION  
NEEDS ASSESSMENT**



# 1 Getting Started (1)

- Recognizing the Perceived Need
- Identifying Key Contacts
- Compiling the Information
- Sharing your Results
- Holding your Initial Community-Based Meeting
- Developing a Project Plan

# 1 Getting Started (2)

## ▪ **Conducting a Preliminary Needs Assessment**

- Collecting local, provincial, national statistics
  - Have links in *Toolkit*
  - Provincial statistics on seniors in your community
  - Steps for 'Aging in Place' - <http://www.seniors.gc.ca/eng/working/fptf/paip-cl.shtml>
  - Age Friendly Calgary strategy  
<http://www.calgary.ca/CSPS/CNS/Pages/Seniors/Seniors-Age-Friendly-Strategy.aspx>
- Informal 'Town Hall' meeting
  - Targeted questions
    - Are there times that you don't go places because you don't have a ride?
    - What transportation services are available in your community?
- Identifying key contacts
- Compiling the information
- Sharing results

# 1 Getting Started (3)

- **Advantages of a Preliminary Needs Assessment:**
  - Demonstrates the magnitude of the problem
  - Helps you identify priorities for your service
  - Establishes credibility
  - Creates awareness of the need for change
  - Promotes community engagement

# 1 Getting Started (4)

- Start to create a Project Plan

*People don't plan to fail but they fail to plan*

## 2 Developing and Implementing a Project Plan (1)

- Developing an Organizational Structure for your Initiative
- Developing a Vision Statement
- Developing a Mission Statement
- Developing Specific Objectives
- Developing Strategies
- Developing an Action Plan

## 2

# Developing and Implementing a Project Plan (2)

- **Organizational Structure**

- Steering Committee
- Advisory Board
- Board of Directors
- Working Boards

- **Registering/Incorporating Your Organization**

- Society
- Non-profit organization
- Charitable organization

## 2 Developing and Implementing a Project Plan (3)

### ▪ Vision Statements

- Defines not only *what* you do but also *why* you are doing it
  - Broad
  - Short
  - Inspiring
  - Uplifting

*Our vision is a world without Alzheimer's disease*  
Alzheimer Society of Canada

*A world where everyone has a decent place to live*  
Habitat for Humanity

## 2

# Developing and Implementing a Project Plan (4)

- Examples of Vision and Missions Statements for ATS Services
  - **Vision:** Our vision is a community that meets the transportation needs of its seniors.
  - **Mission:** To provide responsive and affordable transportation service for seniors in our community as a means of enhancing their access to services and overall quality of life.



## 2 Developing and Implementing a Project Plan (5)

- Developing an Organizational Structure for your Initiative
- Developing a Vision Statement
- Developing a Mission Statement
- Developing Specific Objectives
- Developing Strategies
- Developing an Action Plan

## 2

# Developing and Implementing a Project Plan (6)

## ▪ Developing Strategies

- Does the strategy provide overall **direction** to your initiative?
- Does the strategy take into consideration **current resources and assets** that are needed for your initiative?
- Does the strategy **minimize barriers and/or resistance** to your initiative?
- Is the strategy **directed at your target population**?
- Does the strategy **advance your mission and objectives**?

## 2

# Developing and Implementing a Project Plan (7)

## ▪ Developing an Action Plan

- **What** will happen (e.g., what <action> will occur?)
- **Who** will do what (e.g., who will do <action>?)
- The date to be completed (e.g., **by when** will <action> take place?)
- The resources needed (e.g., **what resources** are needed for <action> to get done?)
- The support that is needed (e.g., **who/what is needed** for <action> to get done?)

# 3

## Conducting a Community

## Transportation Needs Assessment (1)

- The Six Basic Steps to Conducting a Needs Assessment
- Benefits of a Needs Assessment

# 3

## Conducting a Community Transportation Needs Assessment (2)

- The Six Basic Steps to Conducting a Needs Assessment
  - Identifying the need
  - Generating the goals
  - Identifying your target population
  - Selecting your methodology and collecting the data
  - Analyzing the data and generating a report
  - Disseminating and implementing your findings

# 3

## Conducting a Community Transportation Needs Assessment (3)

### ▪ **Benefits of a Needs Assessment**

- Greater understanding of the transportation needs of seniors in your community
- Provides information on *unmet* transportation needs of seniors in the community (and surrounding area)
- Facilitates the implementation of an ATS service that meets the needs of seniors in the community
- Demonstrates your commitment
  - To your target population, other stakeholders, and to the community at large

# Working with Your Community Partners

1

## GETTING STARTED

1. Did you do a preliminary needs assessment?
2. If yes, were there groups you included that we didn't identify?
3. Who were your most important key contacts?
4. What did you do to engage the community?
5. **If you could do it over again, what would you do differently?**

2

## DEVELOPING AND IMPLEMENTING A PROJECT PLAN

1. Did you develop a Project Plan?
  - a. Vision Statement?
  - b. Mission Statement?
  - c. Objectives?
  - d. Strategies?
  - e. Action Plan?
2. If yes, what could you have done better?
3. **If no, how would a Project Plan help you to improve your service?**

3

## CONDUCTING A COMMUNITY TRANSPORTATION NEEDS ASSESSMENT

1. Did you conduct a formal needs assessment?
2. If so, what method did you use (Interviews, focus groups, surveys)?
3. **How do you think the results of a Community Needs Assessment would help in the design/implementation of your service?**

# Overview of Material: Sections 4-6

4

**DEVELOPING &  
SUCCESSFULLY  
LAUNCHING YOUR  
TRANSPORTATION  
SERVICE**

5

**RECEIVING FEEDBACK  
& EVALUATING YOUR  
TRANSPORTATION  
SERVICE**

6

**BUILDING A  
SUSTAINABLE  
TRANSPORTATION  
SERVICE**



## 4 Developing & Successfully Launching Your Transportation Service (1)

- Selecting the Type of ATS Service and Determining how that Service will be Delivered
- Operational Aspects of your ATS Service
- Developing a Policy Manual for your ATS Service
- Managing the Ongoing Day-to-Day Operations of your ATS Service
- Launching your ATS Services
- Responding to Challenges

# 4 Developing & Successfully Launching Your Transportation Service (2)

## ■ **Selecting the Type of ATS Service and Determining how that Service will be Delivered**

- Vehicles
  - Selection of vehicle/vehicles
    - Private vehicle
    - Handivan
    - Bus
    - Combination of vehicles
  - Storage and maintenance
  - Safety inspections
  - Commercial vehicle regulations
  - Licensing requirements
  - Insurance

# 4 Developing & Successfully Launching Your Transportation Service (3)

- **Selecting the Type of ATS Service and Determining how that Service will be Delivered**
  - Drivers
    - Paid
    - Volunteer
    - Combination
  - Insurance requirements
    - Organizational
    - Driver(s)

# 4 Developing & Successfully Launching Your Transportation Service (4)

## ▪ Operational Aspects of your ATS Service

### • Efficiencies in Service Delivery

- **Ride-scheduling software** can create efficiencies in service delivery, especially as the service expands
  - Efficiency in routing and/or scheduling of vehicles and drivers
  - Ability to see how service is being utilized (peak times of usage, and what types of trips are commonly taken) and then can adapt service provision accordingly
  - Gains in quality of service and passenger satisfaction
  - Advanced communication features (mobile data terminals [MDTs], smart phone device capabilities, automatic vehicle locator [AVL])
    - Automates processes, enhances communication between vehicles/drivers, enables faster data transfer and utilization of real-time data, reduces paperwork and administrative tasks

# 4 Developing & Successfully Launching Your Transportation Service (5)

## ■ **Developing a Policy Manual for your ATS Service**

- Organization culture and policies
- Role of procedures and forms
- Workplace guidelines
- Employment policies, status, and records
- Employee payroll and benefits
- Employee conduct

# 4

## Developing & Successfully Launching Your Transportation Service (6)

- **Managing the Ongoing Day-to-Day Operations of your ATS Service**
  - Can often be a stumbling block for many service providers
  - Time spent developing policies in the early stages is of great benefit
  - Document, Document, Document!
  - Strong Board/Steering Committee essential
  - Support Network advantageous
  
- **Launching your ATS Service**
  - Holding an Open House is a great way to launch your ATS service in that it allows members of your community to find out more about your service and to celebrate with you in your success
  
- **Responding to Challenges**
  - Important to identify and respond to in a timely manner
  - Board diversity helpful
  - Sharing successes and challenges (and how you overcame them or are addressing them) with your stakeholders and community is helpful

# 5

## Receiving Feedback & Evaluating Your Transportation Service (1)

- Receiving Feedback
- Formally Evaluating your ATS Service
- Learning from Feedback and Evaluation
- Communicating Outcomes

# 5

## Receiving Feedback & Evaluating Your Transportation Service (2)

### ■ **Receiving Feedback**

- Helps to identify deficiencies of your service
- Allows you to identify strengths of your service
- Allows you to make adjustments to your service to better meet users' needs
- Helps to identify unmet needs

### ■ **Different Methods**

- Anonymous comment cards
- Formal questionnaires
- Feedback from driver
- Phone calls/letters/emails
- Confidentiality important



# 5

# Receiving Feedback & Evaluating Your Transportation Service (3)

## TRIP FEEDBACK

Date: \_\_\_\_\_

Please respond about your trip today	Yes	No
When you scheduled your ride was the person on the telephone courteous?	<input type="checkbox"/>	<input type="checkbox"/>
Were you picked up on time?	<input type="checkbox"/>	<input type="checkbox"/>
Did you arrive at your destination on time?	<input type="checkbox"/>	<input type="checkbox"/>
Was the ride comfortable?	<input type="checkbox"/>	<input type="checkbox"/>
Did you feel safe in the vehicle?	<input type="checkbox"/>	<input type="checkbox"/>
Was the vehicle clean?	<input type="checkbox"/>	<input type="checkbox"/>
Did the driver request you to wear a seat belt?	<input type="checkbox"/>	<input type="checkbox"/>

Please rate the following from your trip today	Excellent	Good	Fair	Poor
How was the service today?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
How happy are you with the service overall?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Please tell us how we can improve the service?				

# 5

## Receiving Feedback & Evaluating Your Transportation Service (4)

- **Formally Evaluating your ATS Service**

- **Criteria**

- How many people are using your service?

- What are people using the service for (e.g., attending medical appointments, accessing 'essential' services [e.g., groceries, banking], attending social functions, religious activities)?
- Days service used (i.e., weekdays, weekends, or both)?
- Times of day service used (i.e., morning, afternoon, evenings)?
- Distance (in community/outside centres)
- Types of trips taken (e.g., single destination, point-to-point, or multiple destinations)?
- Vehicle – clean, meeting needs, etc.
- Does the vehicle of your ATS service meet the needs of your users?
- Satisfaction with cost of the ATS service, method of payment, etc.
- Satisfaction with driver(s)?
- Etc.

# 5

## Receiving Feedback & Evaluating Your Transportation Service (5)

### ■ Learning from Feedback

- Feedback and evaluation can and should be used to improve your service
- Share positive feedback with your Committee/Board and with your Community

### ■ Communicating Outcomes

- Tell the World
  - Articles in the local newspaper
  - Interviews on the local radio and television stations
  - Hold a Town Hall meeting

*Highlight the positives and address concerns*



# Building a Sustainable Transportation Service (1)

- Fundraising
- Marketing Strategies
- Fostering Collaborations and Partnerships
- Promoting Community Engagement and Leadership
- Ensuring Organizational Stability
- Conducting an Internal Review

# 6 Building a Sustainable Transportation Service (2)

## ▪ Fundraising

- Perhaps the greatest challenge!
- Grants (Alberta Government Community Initiatives Program)
- Sponsorships (Corporate, In-Kind [venue, labour, etc.]
- Fundraising events
  - Silent auctions
  - Community events
  - Other

# 6

## Building a Sustainable Transportation Service (3)

### ▪ **Community Initiatives Program (CIP)**

- Funded by the Alberta Government through the Alberta Lottery Fund
- <http://www.seniors.alberta.ca/seniors/age-friendly-funding.html>
- <http://culture.alberta.ca/community/community-grants/community-initiatives-program/>
- **Project-Based Grant** (Community organizations)
  - Equipment purchases
- **Operating Grant** (registered non-profit)
  - Delivering ongoing programs and services to the community
  - Enhancing the organization's ability to operate

## 6

# Building a Sustainable Transportation Service (4)

## ▪ **New Horizons for Seniors Program**

- Federal Grants and Contributions program that supports projects led or inspired by seniors who make difference in the lives of others and their communities
- <http://www.esdc.gc.ca/eng/seniors/funding//index.shtml>



# Building a Sustainable Transportation Service (5)

## ▪ **Other forms of Fundraising**

- Sponsorships (Corporate, In-Kind [venue, labour, etc.])
- Fundraising events
  - Silent auctions
  - Community events



# 6 Building a Sustainable Transportation Service (6)

- **Marketing Strategies**

- Local newspapers, TV/Radio, Posters, Newsletters, etc.

## 6 Building a Sustainable Transportation Service (7)

### ▪ **Fostering Collaborations and Partnerships**

- Particularly at the **Regional level**
- Local businesses, service organizations, local media
- Community events (parades, rodeos, fall supper, etc.)

### ▪ **Promoting Community Engagement and Leadership**

- Takes time and efforts but has the potential to yield many benefits
- Connecting at that **personal level**

# 6

## Building a Sustainable Transportation Service (8)

### Ensuring Organizational Stability

<p><b>Organizational Identity</b> Vision; Mission; Values; Branding; Messaging; Strong Leadership</p>	<p><b>Financial and Other Systems Administration</b> Budget; Cash Flow Analysis; Audit; IRS Reporting</p>
<p><b>Long-Range Strategic Plan</b> Goals; Objectives; Benchmarks</p>	<p><b>Long-Range Fund-Raising Plan</b> Needs and Resource Assessment; Donor Cultivation; Grant Writing</p>
<p><b>Annual Operational Plan</b> Objectives, Activities &amp; Timelines; Staffing; Program Needs; Committed Resources</p>	<p><b>Board Development Plan</b> Needs Assessment; Evaluation; Recruitment; Orientation; Maintenance/Team Building</p>

### Staff Development and Organizational Culture

Needs Assessment;  
Evaluation & Review;  
Training; Team Building

## 6 Building a Sustainable Transportation Service (9)

- Fundraising
- Marketing Strategies
- Efficiencies in Service Delivery
- Fostering Collaborations and Partnerships
- Promoting Community Engagement and Leadership
- Ensuring Organizational Stability
- **Conducting an Internal Review**

# 6 Building a Sustainable Transportation Service (10)

## ▪ **Conducting an Internal Review**

- Annually
- Assess key components of your service
  - Service utilization
  - Operational aspects of service
  - Financial operations

# Working with your Community Partners

4

## LAUNCHING YOUR TRANSPORTATION SERVICE (48)

1. Vehicle considerations
  - a. Type, meeting requirements, insurance,
  - b. Regulations?
2. Driver(s)
  - a. Paid, volunteer?
  - b. Licensing requirements?
  - c. Insurance?
3. Did you develop a policy manual? If not, why not? If yes, benefits?

5

## RECEIVING FEEDBACK & EVALUATING YOUR TRANSPORTATION SERVICE (60)

1. Do you routinely obtain feedback? If yes, how?
2. How do you use this feedback?
3. Have you conducted a formal evaluation of your service?
4. If so, what were the results?
5. Have you used the results to improve your service?
6. Do you have a communication plan? Benefits?

6

## BUILDING A SUSTAINABLE TRANSPORTATION SERVICE (66)

1. What methods of fundraising are you using? Successes? What hasn't worked?
2. Do you have a grant writer or someone you rely on to assist you with your grant applications?
3. **What collaborating partners do you have?**
4. **How would you start fostering collaborations and partnerships?**
5. Do you conduct internal reviews?

# Summary

- *Toolkit for the Implementation of Alternate Transportation for Seniors in Alberta*
  - Available at no charge
  - Paper- and web-based *Toolkit*
  - Goal is to create capacity in development or expansion of alternate transportation for seniors services in rural and urban Alberta
  - To foster a 'community of practice' and knowledge exchange

# Contact Information

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- Tara Pidborochynski
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  - 780-248-1728



# 4 Developing & Successfully Launching Your Transportation Service (Insurance)

## Insurance Information for Community-Based Organizations

- Your voluntary or non-profit organization requires commercial insurance
  - **Non-owned automobile insurance** is recommended for organizations with volunteer drivers
- You should request a driver's abstract (driving record) as part of the volunteer driver application process
- To get the best possible rate and coverage for your organization, make every effort to achieve '**best-in-class**' status with your insurance provider
  - Create a risk management plan; cultivate a relationship with your insurance provider; ensure all documentation submitted is up-to-date, organized, referenced, and labelled

# 4 Developing & Successfully Launching Your Transportation Service (Insurance)

## Insurance Information for Volunteer Drivers

- You **do not** need additional insurance even if you're reimbursed for driving expenses such as mileage or 'wear and tear'
- Insurance premiums should not be affected as a volunteer driver but best to let insurance company know of your activities
- You are **not** required to increase your liability coverage but you must have the minimum liability as outlined by the province
- In the event of a collision while volunteer driving, you are responsible for paying the deductible based on the insurance coverage you have

# Questions?



# [www.auma.ca/events](http://www.auma.ca/events)

June 15-17	Mayors' Caucus in Olds
June 30	Resources for Building a Welcoming and Inclusive Community Webinar
August 15	Media Relations for Municipal Leaders Webinar
October 5 to 7	Convention in Edmonton