

## INTRODUCTION

This manual is not exhaustive in detailing policies and procedures, it covers the essential areas necessary for the effective and accountable operation of a Community Transport Scheme primarily operated by volunteers within a rural context. Every attempt has been made to ensure the accuracy of the information presented. Legal responsibility for all policies and procedures rests with the organisation adopting them.

### Purpose

The purpose of the manual is to:

- develop Best Practice standards for the Community Transport Scheme
- promote equity of access to clients of the various schemes across the region
- standardise service delivery across the region
- facilitate cooperation and coordination between schemes in the region
- facilitate sharing of resources between schemes
- provide new schemes with guidelines to assist in their establishment.

This manual is intended as a working document.

Suggestions for additions and improvements will be gratefully received.

Throughout the document:-

The Swan Hill Neighbourhood House Community Transport Scheme will be known as CTS

Swan Hill Neighbourhood House will be known as SHNH

## SERVICE STANDARDS

**Objective 1**      Access to Services

To ensure that each consumer's access to a service is decided only on the basis of relative need.

**Objective 2**      Information and Consultation

To ensure that each consumer is informed about his or her rights and responsibilities and the services available, and consulted about any changes required.

**Objective 3**      Efficient and Effective Management

To ensure that each consumer receives the benefit of well-planned, efficient and accountable service management.

**Objective 4**      Coordinated, planned and reliable service delivery

To ensure that each consumer receives coordinated services that are planned, reliable and meet his or her ongoing needs.

**Objective 5**      Privacy, confidentiality and access to personal information

To ensure that each consumer's rights to privacy and confidentiality are respected, and he or she has access to their personal information held by the agency.

**Objective 6**      Complaints and Disputes

To ensure that each consumer has access to fair and equitable procedures for dealing with complaints and disputes.

**Objective 7**      Advocacy

To ensure that each consumer has access to an advocate of his or her choice.

## 1. Community Transport Scheme and its Guiding Principles

1.1 Definition of Community Transport Scheme.....	1
1.2 Statement of Philosophy.....	1
1.3 Aim of Community Transport Scheme.....	2
1.4 Code of ethics.....	3
1.5 Access and equity.....	4
1.6 Consumer rights and responsibilities.....	5
1.7 Complaints and Grievance Procedure.....	6

# 1. Community Transport Scheme

## 1.1 Definition of Community Transport Scheme

CTS provides social support and access to a range of services for the transport disadvantaged – people adversely affected by isolation, lack of access to mainstream public transport services or low income.

SHNH CTS primarily funded by the balance of funds donated by the Southern Mallee Transport Connections Partnership at the close of the project works (2013). The vehicle (and attached funding) are now held by SHNH to trial CTS for 3-5 years.

For the purposes of Community Transport “social support” is defined as the involvement of the volunteer in transporting clients. Thus social support is characterised by the companionship and the assistance provided to a client in the course of the volunteers driving duties. This may include conversation, physical support in getting in and out of a vehicle, carrying items, guiding a client to appointments and helping to negotiate on the client’s behalf with other service providers.

## 1.2 Statement of philosophy

Transport is the vital link in supporting the health, wellbeing and independence of people living in the community and in particular older people and people with disabilities. CTS complements both, public and private transport systems, in providing another option for those who have difficulty using or accessing mainstream transport systems.

CTS is committed to providing a high level of service to the community. Cooperation and coordination with other transport providers is vital to high quality service provision.

## 1.3 Aim of CTS

The aim of CTS is to provide social support to members of the community who are transport disadvantaged. This includes people who:

- Are isolated
- Have low incomes
- Cannot access mainstream public or private transport
- Are unable to use conventional public transport

The service aims to provide assisted transport to medical, therapeutic and other professional appointments and to social and recreational activities. In particular:

- To provide access to specialist and general medical services in Swan Hill and surrounding districts
- To provide access to health services
- To provide access to Community Health services, eg: information session
- To provide access to educational activities, such as school programs and TAFE

- To facilitate contact with relatives and friends
- To provide shopping transport for isolated people, to provide transport to outings, eg: Senior Citizens, Youth Groups etc, films

#### 1.4 Code of Ethics

##### Principle

CTS is committed to treating its clients, volunteers, staff and Committee of Management members with honesty, dignity and respect. This entails a commitment to confidentiality; understanding the scheme's responsibility to its consumers and management's responsibility to volunteers and staff.

##### Procedure

This code of ethics binds staff, volunteers, and Committee of Management members of the CTS. An acknowledgement to this effect will be signed by each person currently involved in the organisation and each new person as they join the scheme. Breaches of this code may result in disciplinary proceedings and possible expulsion from the scheme.

##### Confidentiality

CTS is committed to the confidentiality of clients. No information of a personal nature is to be passed to anyone outside the service without the permission of the person concerned (preferably in writing). However in order to ensure proper assistance is given personal information about clients may need to be discussed with other members of the service. This is not a breach of confidentiality.

Staff, Volunteers and Committee of Management members will also be confidential in their relationships with each other.

##### Responsibilities of Staff, volunteers and Management Committee

Staff, volunteers and Management members will:

- Respect the privacy of clients;
- Respect the values and attitudes of clients, their right to make their own decisions and work out their own problems;
- At all times have concern for the safety and well being of clients, other members of the service and general public;
- Provide comprehensive information to clients and inform them of their rights.
- Adhere to all laws and regulations;
- Declare all conflicts of interest;
- Maintain in good order property which they are entrusted to use;
- Account for monies collected;
- Ensure that no property of the organisation is used for personal use without prior consent of the coordinator/manager/committee of management.

## 1.5 Access and equity

### Principle

All those involved in the service will be treated equitably whether clients, volunteers or management members. There will be no discrimination on grounds of age, race, physical, intellectual or psychological impairment (including HIV and AIDS), gender, sexuality, marital status, religious or political beliefs and geographical location.

### Procedure

This principle of equity will underpin the operation of the scheme at all levels. Each consumer's access to a service will be decided on the basis of relative need.

## 1.6 Consumer rights and responsibilities

### Principle

Clients have both rights and responsibilities.

### Procedure

Clients have the following rights and responsibilities:

#### Rights

- The right to respect;
- The right to privacy and confidentiality ;
- The right to make a complaint and have the complaint resolved in a timely manner;
- The right to information about the scheme's services;
- The right to access any of their personal information held by the scheme.

#### Responsibilities

- The responsibility to provide as much notice as possible (ideally a minimum of two days except in emergencies) of travel requirements when making a booking with CTS;
- The responsibility to provide as much notice as possible (ideally a minimum of two days except in emergencies) of any changes to travel requirements;
- The responsibility to notify the scheme about any special requirements at the time of booking, e.g. pre-existing medical conditions, travel sickness, disability;
- The responsibility to respect the rights of volunteers and other clients;
- The responsibility to contribute financially to the cost of the service they receive except where this will cause financial hardship.

## 1.7 Complaints and Grievance Procedure

### Principle

Good relationships with clients and other service providers are essential. This is equally the case for relationships between those working together to provide the service. Prompt resolution of any difficulties promotes Best Practice.

All those involved with the service (i.e. clients, service providers, volunteers, paid staff and management) have the right to make a complaint without recrimination and to seek assistance in achieving a fair resolution without this adversely affecting their continuing relationship with the scheme. The complaints procedure should:

- maintain confidentiality;
- be simple and accessible;
- ensure a fair hearing for all involved;
- ensure a resolution in a timely manner.

#### Procedure

- This complaints procedure is intended to be used in situations ranging from minor concerns to allegations of serious misconduct.
- Complaints may be verbal or in writing and with the assistance of a friend/advocate and/or an interpreter.
- All complaints must be documented by the coordinator.
- The service should provide all relevant information about the Complaints Procedure to clients, service providers, volunteers, paid staff and management in both verbal and written form as part of their contact with the scheme.

If conflict arises, the following steps should be taken:

- **If the matter is of minor concern:**  
In the first instance it should be discussed with the other person or persons involved. In most cases this direct approach is the best approach and will resolve the difficulty.

If the matter is not resolved to everyone's satisfaction, it should be referred to the next level of the scheme's management. For example if the dispute is between a volunteer and client, the coordinator would become involved or if the dispute is between volunteer and coordinator a Management Committee member would become involved.

If the conflict remains unresolved after this process, an impartial third party, agreeable to those in dispute, should be nominated to mediate.

- **If communication difficulties or personality conflicts are involved:**  
In this case the matter should be taken to the coordinator or the next level of the scheme's management.

If the difficulty remains unresolved, an impartial third party, agreeable to those in dispute, should be nominated to mediate.

Complaints of this nature should be documented.

\*\*\*\*\*DIAGRAM OF GRIEVANCE PROCEDURE\*\*\*\*\*



## 2. Management

2.1	Management.....	8
2.2	Administration .....	9
	Donations/Contributions.....	9
	Determining contribution levels .....	10
	Insurance .....	10
	Police Checks.....	11
	Identification .....	12
	Volunteers using their own vehicles .....	12
	Documentation.....	12
	Records.....	13
	Reporting .....	13
2.3	Community liaison and participation .....	13
2.4	Publicity and promotion .....	14

## 2. Management and administration

### 2.1 Management

#### Principle

Effective management is essential to the provision of a quality service. The functions of management need to be clearly identified to ensure accountability.

#### Procedure

There are functions of management which remain constant regardless of such variables as scheme size, structure and auspicing arrangements. The way these functions are allocated will be determined by the auspicing body and/or the Management Committee. This section deals with management in terms of functions rather than by role.

The following functions of management:

- to establish and maintain the infrastructure for the scheme's operation including:
  - o vehicles – eg: fuel, maintenance, appropriate insurance
  - o reimbursement of volunteers out of pocket expenses, eg: phone calls
  - o support and training of volunteers
  - o other equipment, eg: answering machine, mobile phone, computer
- to define the policy framework under which the scheme operates
- to establish comprehensive procedures governing the scheme's day to day activities
- to be responsible for employees/volunteers of the scheme. This includes ensuring that:
  - o the working environment is clean, orderly and safe and meets occupational health and safety standards
- to provide day to day support for the coordinator
- to assist in promoting and publicising the scheme
- to establish and maintain arrangements for the financial aspects of running the service including:
  - o recommending donation levels/fees for the use of the community car
  - o obtaining regular financial reports so that the scheme is aware of its financial position

#### Committees of Management

There are a number of advantages of locally based committees of management or advisory committees. This is the case even where schemes are ultimately managed and auspiced by an organisation. Committees can provide:

- support to the coordinator

- assistance in sharing the more onerous tasks of management, eg: setting and publicising the recommended donation/fee levels for travel, local knowledge of community needs and existing resources
- more extensive promotion of the scheme in the community
- improved networking with service clubs and other community groups.

## 2.2 Administration

### Donations/Contributions

Fares are charged at a subsidised rate and the program relies on donations to assist in the running costs of vehicles. Suggested rates have been arrived at in an attempt cover costs of petrol, registration, insurance, maintenance and replacement cost of vehicles. However, because CTS is provided to assist disadvantaged sections of the community, it is not the intention that clients should suffer financial hardship in making such payments. Clients who are unable to pay for the costs of the service should raise the matter with the coordinator of the program at the time of making a booking. The coordinator has the discretion to either waive payment or reduce the cost of the service to the client.

In some circumstances arrangements may be made for a third party to contribute to the cost of the service rather than the client themselves.

The volunteer driver may be asked to collect the client's contribution when their trip is finished. A receipt is to be given for any monies received. It is not the volunteer driver's responsibility to pursue unpaid fees. Such matters should always be referred to the scheme coordinator, as there may be legitimate reasons for no contribution being made such as third party paying or financial hardship.

#### Determining contribution levels

In determining rates of contribution, the program acknowledges that CTS resources may be used by different groups in the community,

Clients	For CTS's key target group – the transport disadvantaged – the intention is to recover some of the costs of providing the service.
Other groups	For other groups the intention is to recoup as close to 100% of actual costs incurred. Suggested rates are for return travel, There may be reductions for shared travel and different rates for various users. For example: <ul style="list-style-type: none"> <li>• non-profit-community groups and organisations, 35-60c per km depending on the vehicle involved, or a rental fee plus the cost of fuel</li> <li>• where the user has the ability to pay eg: working family using the vehicle due to lack of their own transport, 45c per km</li> <li>• groups such as social clubs of the local restaurant for Saturday night home run, 45c per km</li> </ul>

## Insurance

Appropriate insurance coverage needs to be in place to protect clients, volunteers and vehicles.

While working for this organisation, volunteers are covered by personal accident insurance. All volunteers are also covered by public liability insurance and transport accident insurance.

Clients are covered by third party insurance. All volunteers are required to complete a Volunteer Application Form and provide a photocopy of licence for insurance purposes. A current standard car driver's licence will suffice.

## Police Checks/Working with Children Checks

Some funding bodies already require (eg: HACC) and others recommend (eg: DEECD) that their clients are transported by volunteers who have had Police checks. Volunteers are in a position of trust in that they frequently transport clients who are vulnerable, because of this Police checks constitute Best Practice.

While individual schemes will make decisions about police checks for existing volunteers, it is mandatory that all new volunteers undergo a police check and a Working with Children Check, prior to registration.

There is a cost involved in obtaining these checks, which under no circumstances will be borne by the volunteer. Swan Hill Neighbourhood House uses the Crimcheck database to complete Police Checks. The volunteer fee is applicable when the following criteria are met:-

- the subject of the check does not receive any form of recompense for the service that he/she performs for the organisation. Reimbursement of direct expenses (for example petrol expenses) will not disqualify the individual from the reduced charge;
- the work undertaken by the volunteer primarily involves personal contact with children, older people or people with disabilities and other vulnerable groups.

Police checks/WWC will be considered current while a volunteer continues to be registered with a scheme. If however there is a break in registration (eg: a volunteer resigns and subsequently rejoins) a new police check may be required.

The following recent or frequent offences may disqualify a volunteer from registration with the scheme:

- driving under the influence of alcohol (DUI)
- traffic offences such as speeding
- assault
- child abuse
- crimes involving theft or deception

## Identification

All members of the scheme will wear identification when dealing with the public. This will be provided to each person as they join the scheme.

### Volunteers using their own vehicles

Use of volunteer's private vehicles to transport CTS clients is not encouraged. However, where volunteers do use their own vehicles to assist the service, they are required to provide details of their Comprehensive Insurance Policy and a note from their insurance company authorising that the vehicle be used for CTS. At the discretion of the scheme, a road worthy certificate may be requested for the vehicle being used. Volunteers authorised to use their own vehicle will be reimbursed for petrol costs at a rate mutually agreed to by the volunteer and the scheme. A volunteer may only use their own vehicle for CTS purposes with the consent of the scheme's coordinator.

## Documentation

Preparation for the following written material is the responsibility of management:

- Volunteer handbook (given to each volunteer/committee member)
  - Contents
    - names and contacts for Committee of Management and other volunteers
    - key policies and procedures (excerpts from Policy and Procedures Manual)
- Orientation Manual (held centrally in coordinator's office)
  - Contents
    - information about CTS
    - policy and procedures
    - information about other services and referral
    - names and contacts for Committee of Management and other volunteers
- Pamphlet about the scheme
  - Contents
    - information about the CTS for circulation to clients, other service providers and the community at large
- Service directory
  - Contents
    - names, addresses and phone numbers for destinations
    - maps
- Records
  - up to date lists of those involved in the scheme, eg: volunteers, Committee of Management members
  - log books
  - client information
  - register of volunteers
- Reporting
  - Details of reports are outline in 3.2 Evaluation
    - annual report
    - financial statements

- service data

## 2.3 Community liaison and participation

### Principle

CTS aims to provide a series that is responsive to the needs of the transport disadvantaged. Consumers of services should be able to participate in their development.

### Procedure

The coordinator and Committee of Management will encourage community involvement in the scheme's planning and development.

Regular consultation will be held with the general community to identify needs, demand and supply for transport. Target groups to include: other transport providers, other service providers, community organisation.

Client feedback will be collected by documentation of informal and formal feedback and regular random client surveys.

## 2.4 Publicity and promotion

### Principle

Members of the community should be aware of the CTS resources available to them. People assimilate information in different ways and are receptive at different times. Multiple strategies need to be employed to ensure maximum coverage of the community.

### Procedure

The scheme will be promoted on a regular basis

- Information could include:
  - What is CTS?
  - eligibility criteria
  - description of the services
  - details of donations/fees requested
- Strategies could include:
  - liaison with service clubs and other community transport groups
  - speaking to community groups
  - regular advertising in local newspapers school and community newsletters and other media
  - placement of notices in local shops and other public venues
  - producing an information sheet/pamphlet to be given to clients and made available to other service providers and the community generally
  - letterbox drops

- notifying the local taxi service and other private transport providers of the eligibility criteria the scheme will be using

### 3. Planning and Evaluation

3.1	Planning.....	15
3.2	Evaluation.....	16



## 3. Planning and Evaluation

### 3.1 Planning

#### Principle

Planning is an integral part of service delivery providing the scheme with direction and a blueprint for operations in all areas.

### 3.2 Evaluation

#### Principle

Regular evaluation provides a means of measuring the extent to which the needs of a scheme's target groups are being met. It provides mechanisms for monitoring the effectiveness and efficiency of its services and in particular for determining whether its objectives are being met. It is a valuable tool for service development.

#### Procedure

Information is gathered and collated regularly from three principal sources to form a composite picture of how well the program is working. These principal sources are:

- financial reporting
- service data
- community input

The information could be collected and presented monthly, quarterly or annually as determined by the Committee of Management. In the case of Financial Reporting, a profit and loss summary could be generated at each reporting point. The annual report provides a regular forum for documenting the program's overall performance.

#### Financial Reporting

- vehicle operating costs – fuel, maintenance, registration, insurance, depreciation if applicable
- revenue generation
- administrative costs – staff wages, rent , telephone, office supplies and training

#### Service Data

- Client profile – user category, residential location, community groups who use the vehicle, refusals of service including reason for refusal and outcome, complaints and outcome
- Daily data collection – vehicle log sheets, schedules and client comments/feedback, volunteer comments/feedback
- Client feedback – regular random client surveys, collection and documentation of informal and formal feedback

#### Community Input

- Annual consultation with the general community to identify needs, demand and supply for transport. Target groups to include: other transport providers, other service providers, community organisations

#### The Annual Report

The annual report could include the following information:

- number of client trips per year
- number of individual clients
- number of community groups using vehicle
- type of transport provided
- destinations
- client classification
- total km travelled
- hours worked, paid and unpaid
- key aspects of client and service user feedback
- met and unmet need, unfulfilled requests, reason and solutions

4.	Staffing	
4.1	Volunteers.....	18
	Desirable qualities.....	18
	Essential requirements.....	18
	Volunteer responsibilities.....	19
	Volunteer rights.....	20
4.2	Volunteer Coordinators.....	20
4.3	Paid Coordinators.....	21
4.4	Occupational health and safety.....	21
	Vehicle Safety.....	21
	Accident and Injury.....	21
	Health.....	21
4.5	Orientation and Training.....	22
	Orientation.....	22
	Training.....	22

## 4. Staffing Policy

### 4.1 Volunteers

#### Principle

CTS services are provided principally by volunteers. These volunteers give freely of their time to benefit the community. The scheme acknowledges the invaluable contribution of its volunteers and undertakes to train and support them in their role. Volunteers also have a number of rights and responsibilities.

#### Procedure

Volunteers have two principal roles – coordination and providing direct services to clients. The latter role involves far more than driving. The greatest strength of Community Transport is the social and practical support provided to clients.

In developing a scheme's volunteer base, it is important to be aware both of the wealth of literature about volunteerism and the specialist organisations which have developed expertise in the training and support of volunteers. Reference to such resources will help to ensure that the scheme's volunteers receive the quality of training and support they deserve.

#### Desirable Qualities

Volunteers should have:

- the ability to work with other volunteers
- the willingness to be of assistance to clients of the service
- an awareness of the needs of disadvantaged people in particular those who are transport or financially disadvantaged, disabled and frail aged
- an ability to be realistic about the time they give to the scheme and not to over commit
- be over the age of 25 for insurance purposes and have at least five (5) years driving experience (although applications by other drivers will be considered on their merits)

#### Essential Requirements

Volunteer drivers are required to:

- have and keep a current drivers licence and supply a photocopy for the scheme's records
- be of reasonable health and fitness and notify any changes to that situation to their coordinator
- provide a medical certificate annually if more than 70 years of age stating his or her fitness to transport clients. Volunteers will be reimbursed for the cost of providing the certificate, after Medicare benefits have been taken into account
- take direction from their coordinator
- be available for rostering
- wear identification provided by the scheme when carrying out duties
- notify the Coordinator of inability to meet roster commitments
- notify the Coordinator

- of any offence that might render them ineligible to drive for the scheme
- drive in accordance with proper safety precautions to ensure the safe transport of clients and obey all road laws, especially those relating to alcohol and drugs. Any traffic and parking infringements will be the responsibility of the driver
- maintain a safe working environment at all times
- care for and return equipment after use
- maintain appropriate records such as the vehicle log
- refuse any remuneration from clients – donations/contributions made for the service must be acknowledged by a receipt
- refrain from making public announcements relating to the service without prior approval of the scheme's management
- have a current first aid certificate

### Volunteer Responsibilities

The responsibilities of volunteer drivers are to:

- maintain the privacy and confidentiality of others
- respect the values and attitudes of clients, their right to make their own decisions and work out their own problems
- treat people they are working with as they would like to be treated
- not judge peoples capabilities by their disabilities support clients in getting their needs met
- go to the nearest hospital to seek medical help if a client becomes ill
- participate in required training programs
- be involved with the management of the scheme in regular reviews of their role and performance
- refer client requiring information and services to the appropriate professional or agency
- provide feedback, suggestions and recommendations regarding the program to the coordinator

### Volunteer Rights

Volunteers have the right to:

- orientation and training including:
  - information about policies, procedures, programs and the client group
  - support and advice about the service
  - travel with an experienced volunteer driver before doing trips unaccompanied
  - instruction in dealing with medical emergencies
- be regarded as a co-worker in the scheme
- briefing and debriefing about their work
- a safe working environment
- insurance coverage
- be heard, trusted and respected
- have their personal preferences and experience taken into account when being allocated work
- be able to refuse and assignment or resign from the scheme
- reimbursement of out-of-pocket expenses

- recognition and thanks (eg: certificates of service, social functions, meals, refreshments, other tokens of appreciation).

#### 4.2 Volunteer Coordinators

Where the coordinator is undertaking this role as a volunteer they also have the following responsibilities:-

- to take and organise bookings for use of CTS vehicle/s
- to match volunteers with clients to ensure the client is comfortable with the service
- to match clients with other clients to ensure the clients are comfortable with the service
- to coordinate client needs with availability of volunteers, vehicles and the needs of other clients
- to ensure the roadworthiness of the scheme's vehicle/s
- to work with management as a whole to regularly replace the scheme's vehicle/s
- to work with management as a whole to administer the scheme
- to recruit, train and support volunteer drivers
- to organise the safe transport of eligible users of the service ensuring that the most cost effective means are used (eg: multi bookings where possible)
- maintain a register of volunteers
- to roster volunteers for duty
- to organise the servicing of the community car in accordance with the manufacturer's recommendations
- to receive donations/fees from volunteers and arrange banking
- to assess clients to ensure the appropriate use of the scheme's vehicle/s.

#### 4.3 Paid Coordinators

Where coordination is undertaken by paid staff, their duties will be detailed in their job description and their conditions of employment covered under an appropriate job contract and/or industrial award.

#### 4.4 Occupational Health and Safety

##### Principle

It is the responsibility of management to provide a safe work environment.

##### Procedure

##### Vehicle Safety

- All vehicles will be appropriately maintained to ensure mechanical safety
- Volunteers will receive training to promote technical and defensive driving skills
- Volunteers will be assessed on their driving skills prior to driving clients of the scheme
- Coordinators will ensure that work levels do not pressure or fatigue volunteers to the extent that this jeopardises the volunteers of client's safety
- Coordinators will ensure that volunteers are appropriately equipped to facilitate the performance of their work. eg: maps, run sheets, contact numbers.

#### Accident and injury

The coordinator will ensure that action plans are in place for immediate response at the time of any accident or injury. These action plans will include appropriate reporting mechanisms.

#### Health

Coordinators will ensure that volunteers are informed about health risks that may be associated with their work, eg: HIV/AIDS, Hepatitis B, C, etc. and encourage volunteers to take preventative measures, eg: vaccination

### 4.5 Orientation and Training

#### Principle

Orientation and ongoing training are essential to the job satisfaction of volunteers and the provision of a quality service. Coordination and cooperation with other schemes in the region are the keys to accessing opportunities for such development.

#### Procedure

##### Orientation – volunteers and Committee of Management

An orientation process will be used to introduce each new volunteer/committee member to the scheme

The process will involve each person receiving:

- a volunteer handbook
- access to an orientation manual and the opportunity to familiarise themselves with its contents
- an explanation of key policies and procedures
- an on-site inspection and familiarization with location of vehicle, care and protection of vehicles

##### Orientation of Volunteer Drivers

It is essential that volunteer drivers receive adequate orientation to their driving duties. This should include:

- familiarisation with the vehicle they will be driving
- familiarisation with the routes they will be travelling

In addition volunteer drivers should also receive instruction in managing medical emergencies (eg: what to do/what not to do if a client has an epileptic fit, heart attack etc).

##### Training of Volunteer Drivers

It is desirable that volunteer drivers receive training in the following areas:

- first aid
- working with clients
- their role

Coordinators of schemes in the region will work cooperatively to facilitate access to such training.

Management should also have the opportunity to access training about CTS.



5.	The Service	
5.1	Eligibility for Service.....	23
5.2	Determining Priorities and Meeting Demands.....	24
5.3	Sharing Resources.....	25
5.4	Bookings.....	26

## 5. The Service

CTS provides social and practical support to clients. Transport is one part of the assistance given to clients to access a range of services.

### 5.1 Eligibility for service

#### Principle

While the Committee of Management determines eligibility criteria for use of the scheme's vehicles, the funding body determines the principal client target group.

#### Procedure

Eligible users of the community car include:-

- people who cannot use conventional public transport, in particular frail aged persons or persons who have physical, sensory or intellectual disabilities
- carers of the above
- family and friends of the above
- people who are economically disadvantaged
- people who are geographically isolated
- people who do not have access to other means of transport
- people who attend group activities

Transport can be provided for any of the following:-

- medical and therapy appointments
- clients who are returning home from hospital
- access to Community Health services, such as support groups, information sessions
- to visit friends, relatives at local or regional health care facilities
- to provide transport to local and regional social activities
- to provide local and regional shopping transport

Transport will not be provided if:

- the client or group has other transport available to them
- the client should be receiving transport from the Ambulance service
- the client is in poor health and in the opinion of the scheme's coordinator requires medical supervision
- the client is an inpatient and requires transport between medical facilities
- this entails a volunteer having to sign hospital discharge documentation
- in the opinion of the scheme's coordinator the client requires and escort and none has been provided

### 5.2 Determining priorities and meeting demand

#### Principle

There is a need to balance the demand for the service with the availability of resources. Decisions about priorities will be based on the scheme's documented policies.

## Procedure

It is the responsibility of the coordinator to make decisions about the best use of the CTS resources however there is clear priority of access. Universally, attending medical appointments receives greatest priority followed by other professional services, social or health groups, social activities and shopping.

- Balancing demands for service with available resources  
The coordinator will frequently need to make decisions about the best use of available resources. In processing each request for transport the following will need to be considered
  - o availability of volunteer
  - o availability of appropriate vehicle and equipment
  - o maximizing the numbers of clients serviced
  - o meeting as many of the client's needs as possible
  - o minimizing the duplication of tripsIn circumstances where a request for service limits a vehicle's availability to other clients, it may be necessary to refuse that request, eg: a request to carry a child to school daily or to carry someone to daily medical treatment. In such circumstances liaison with other services is essential to assist in getting the request for service met.
  
- Special Requests  
Where a need exists, but the client is not eligible for the service, reasonable efforts will be made to identify viable alternatives. If a CTS vehicle is available, once off arrangements may be made to provide the service.
  
- Matching  
Many journeys will involve clients and volunteers spending significant amounts of time with each other. The coordinator may need to consider the compatibility of volunteer with client and clients with each other when organising bookings.
  
- Use of Community Car by Other Organisations/Groups  
It is recognised that it may be appropriate to permit use of the vehicle by either organisations or groups. For such uses, where the volunteer is to be supplied by another organisation/group, that volunteer must be registered as a volunteer driver with the scheme.

## 5.3 Sharing resources

### Principle

Wherever possible there should be close cooperation between CT schemes to make the best use of existing resources.

### Procedure

#### Familiarity with other regional resources

It is the responsibility of the coordinator to familiarise themselves with other transport resources in the region. This includes private and voluntary sector providers as well as other Community Transport schemes.

#### Volunteer registration and training

It may be possible to share volunteers across schemes thus eliminating insurance difficulties. A standardised regional system for assessing and registering volunteers may be the best method of ensuring this.

#### Protocols for sharing vehicles

It is the responsibility of the vehicle user to return any borrowed vehicle in the state in which it was delivered. Particular attention should be paid to the cleanliness of the vehicle both inside and out. Vehicles should be refilled with fuel prior to being returned.

#### Costs

Where sharing of resources takes place, there needs to be a recognition of the costs to both parties to the arrangement. For example, if a Community Transport vehicle transport a client for another scheme, the transport provider receives any donation/fee. If however both schemes are involved in sharing the transportation, then the scheme taking the booking will need to compensate the other scheme involved. Where one scheme uses another scheme's vehicle, it may be necessary for the borrowing scheme to agree to meet the cost of the insurance excess in the event of an accident to the lending scheme's vehicle.

#### Opportunities for maximising the benefits of cooperation

Trips to Melbourne offer a major opportunity for schemes to benefit from close cooperation. Significant savings may be achieved in vehicle costs and volunteer time by sharing such trips wherever possible. The following points could be considered:-

- maximizing efficiency by ensuring cars travelling to Melbourne are full
- drivers making trips to Melbourne could be specially selected for experience in city driving and local knowledge, a central regional register of drivers for city trips could be developed
- where the Melbourne trip involves return in the same day, two drivers could share the load

## 5.4 Bookings

Bookings can be made by the client requiring the service or by their doctor, family or friend. As much notice as possible should be given for routing trips. Ideally a minimum of two day's notice is necessary to allow the scheme to organise the volunteer and vehicle. However a week's notice is preferable. Emergency situations will be assessed by the coordinator on a needs basis and met if resources are available. The creation of a standardized regional booking form should facilitate cooperation between the schemes.

- Information required from client at time of booking
  - time required
  - collection point and destination
  - reason for trip

- one way or return
- number of clients
- name(s) of clients
- ability to contribute financially to the cost of the service
- any special requirements

○ Special Requirements

At the time of booking it is important to establish if a client has any special needs which will affect the safe and comfortable transport of that person. These special requirements may also affect the number of clients that may be carried.

Some examples of a client's special needs are:

- the tendency to car sickness
- the inability to remain in one sitting position for long periods of time
- the need to be escorted to appointment
- the need to be accompanied by a guide dog
- the need to sit in a front seat because of a leg problem
- legal considerations, such as the requirement to have special restraints for children and infants

○ Information to be given to clients

- rate for the service
- the right to exemption from making a contribution in cases of financial hardship
- payments arrangements
- arrangements for confirming booking
- pick up time and name of volunteer
- the circumstances under which cancellation can occur (eg: vehicle breakdown, or hazardous road conditions).

This information may be provided by phone or in writing. Where a client is making contact with the scheme for the first time, a brochure on the service should be forwarded to them.

Run sheet for volunteers

Volunteers will receive written information confirming details of clients, times and destinations for each journey they undertake.

6.	Motor Vehicle Policy	
6.1	Registration and Insurance.....	28
6.2	Contingency plans for breakdown and accident.....	28
6.3	Equipment.....	28
6.4	Garaging.....	29
6.5	Procedure for using vehicle.....	29
6.6	Log Book.....	29
6.7	Fuel.....	29
6.8	Maintenance.....	30
6.9	Traffic Infringements.....	30
6.10	Breakdown.....	30
6.11	Accident.....	31
6.12	Seating Capacity.....	31
6.13	Alcohol and Drugs.....	31
6.14	Smoking.....	32
6.15	Eating and Drinking.....	32
6.16	Hazardous Substances.....	32

## 6. Vehicle Policy

### Principle

The care of the CTS vehicle/s and the safety of occupants are of prime consideration.

### 6.1 Registration and Insurance

Current registration and insurance will be maintained on the scheme's vehicle/s.

### 6.2 Contingency plans for breakdown and accident

Plans should be in place in the event of breakdown or accident rendering the scheme's vehicle/s unable to be driven. These should cover alternative transport arrangements for the driver and any passengers and vehicle recovery. Drivers and clients should not be expected to meet costs in the event of the above emergencies.

Some vehicle purchase or leasing arrangements include roadside assistance. However if it is not the case, membership of RACV is recommended. The organisation offers a full cover membership which should meet the above requirements.

### 6.3 Equipment

#### Essential

Each vehicle will have the following minimum equipment:

- fire extinguisher
- articles for car sickness etc
- first aid box
- child restraint bolt
- maps of area
- log book

#### Desirable

It is desirable that the following equipment be available for use with the vehicle as required:-

- Service Directory
- swivel seat
- combination baby capsule/child safety seat
- umbrella
- cargo barrier for station wagon

### 6.4 Garaging

The community car will be garaged at a location designated by the coordinator. The keys to the vehicle will be held by the coordinator or their nominee and can be collected, by the volunteer from them when the car is to be used.

### 6.5 Procedure for using vehicle

#### Before each trip

- collect keys
- ensure that tyres have all been checked
- record relevant details in log book

After each trip

- complete log book details
- report any difficulties, articles left in the vehicle or accidents to the coordinator

## 6.6 Log Book

A log book will be kept in each vehicle. For each trip the following information will be recorded:-

- date
- name of driver
- start time
- start kilometres
- finish time
- finish kilometres
- number of clients
- service to
- destination
- address (residential units only)

## 6.7 Fuel

Fuel is only to be obtained using the fuel card held in the vehicle.

## 6.8 Maintenance

It is the responsibility of the coordinator to ensure that vehicle service and maintenance are carried out regularly and in accordance with the manufacturer's recommendations.

The exterior and interior of vehicle/s are to be cleaned regularly.

Basic maintenance checks are to be carried out at least once per week. Items to be checked are:

- oil and water
- steering
- brakes
- tyres
- rear vision mirrors
- windscreen wipers
- lights

The fire extinguisher is to be checked once every 12 months and refilled as soon as possible if it is used.

## 6.9 Traffic/Parking Infringements

Volunteer drivers will be responsible for any traffic/parking fines they incur while driving CTS vehicles. In certain circumstances a parking fine may be incurred because of delays outside



the volunteer's control. If the volunteer believes there are special circumstances and they should not pay such a fine, they should take the matter up with the scheme management.

#### 6.10 Breakdown

A vehicle should not be driven if there is a possibility of overheating or other damage. In the event of a breakdown, the volunteer should call the RACV. The volunteer needs to explain to the RACV if clients are on board, and request that they attend as soon as possible. The volunteer should then call the coordinator if it is necessary to make appropriate alternative arrangements for clients.

#### 6.11 Accident

Any accidental or wilful damage to the vehicle must be immediately brought to the attention of the coordinator.

In the event of an accident volunteers should:

- never admit liability or sign any papers – the schemes insurance company could reject the claim
- exchange names, addresses contact numbers with the drivers of any other vehicle/s, details of vehicle ownership, registration numbers, insurance companies
- note the time of accident, weather conditions, visibility and other details
- render any assistance necessary
- report to the coordinator and complete any necessary paperwork
- ensure that the accident is reported to the police within 24 hours

In the event of an accident involving injury to any person the police must be contacted immediately.

In the event of an accident rendering the vehicle unable to be driven, the driver should contact the coordinator.

Any volunteer who is injured in a road accident whilst using a Community Transport Vehicle, will be covered by the agency for any excess on TAC insurance.

Any client who is injured while a client in a CTS vehicle where the volunteer is at fault, will be covered by the scheme for any excess on TAC insurance.

#### 6.12 Seating Capacity

Seating in the vehicle is legally limited according to the number of seat belts. Exceeding this limit may render insurance invalid.

#### 6.13 Alcohol and Drugs

No alcohol is to be consumed by a volunteer prior to or while driving any CTS vehicle. Similarly no drugs should be taken which will have an effect on the ability of the volunteer to drive. This applied to both prescription and non-prescription drugs.

Clients are not permitted to consume alcohol or take non-prescription drugs while in the vehicle.

Volunteers are not expected to take responsibility for administering prescription drugs to clients.

#### 6.14 Smoking

Smoking is not permitted in CTS vehicles.

#### 6.15 Eating and Drinking

Clients are asked to refrain from eating and drinking in CTS vehicles. Consumption of food and drink may result in additional cleaning work for already busy volunteer drivers.

#### 6.16 Hazardous Substances

CTS vehicles may not carry hazardous substances.

7. Sample Forms

7.	Introduction.....	33
7.1	Volunteer registration form.....	34
7.2	Incident report form.....	36
7.3	Driver assessment form.....	38
7.4	Unit cost data collection sheet.....	40
7.5	Unit cost summary sheet.....	41

## 7. Sample Forms

### Introduction

The forms included in this section cover:

- Volunteer Registration
- Volunteer Driver Assessment
- Critical Incidents
- Unit Costing

### Volunteer Registration Form

The registration form acts as a checklist for gathering a driving history and information about the skills and experience of the volunteer. It is also an important record for the scheme.

### Volunteer Driver Assessment Form

Where possible, it is desirable to assess the driving skills of volunteers prior to their commencing driving for the scheme. The form covers essential skills for safe driving.

### Critical Incident Form

This form is for use in recording a range of events including:-

- traffic accidents
- incidents which may lead/have led to clients complaints
- incidents in which a client is injured, becomes seriously ill or distressed

The process of completing the form provides a means for the volunteer to debrief, but should not be seen as a substitute for support. The form is important in recording events which may later be the subject of legal proceedings.

### Unit Costing Forms

Included are data collection sheet and a summary page for calculating unit cost. It is envisaged that data would be collected on an annual basis and used as a mechanism for monitoring service costs and assisting in determining donation/fee levels.

\*\*\*\*Insert copies of Volunteer Registration Form, Incident Report Form, Driver Assessment Form

Re-type Unit Costing sheet

\*\*\*Insert copy of Community Transport Unit Cost Data Collection Sheet & Community Transport Unit Cost Summary Report