

Carlisle Council on Aging Transportation Policy

Effective July 1, 2013

June 18th, 2013

V1.0

1. Objective

- The objective of this policy is to ensure that the transportation needs of clients (the senior and adult disabled population of Carlisle) are met to the best of our abilities. Additionally, the Carlisle Council on Aging (COA) wants to ensure that we derive maximum benefit from the funds and resources available to us in pursuit of meeting our broader COA objectives. Transportation is available for all COA events, both local and out of town, as well as requests for rides for medical appointments or other errands.

2. Scope

- This policy includes all aspects of transportation used to meet the non-critical needs of the senior population. This includes, but is not limited to, the COA vehicles, personal cars and commercial carriers. The COA mini-buses are referred to as qualified vehicles. Other vehicles may be added to this list at a later date.
- Clients must be independent/autonomous, and mentally and physically capable away from their homes or they must be accompanied by a capable adult.
- Policy exclusions
 1. This policy excludes all transportation in emergency situations, specifically services such as where “911” would be called.
 2. This policy excludes the transportation of individuals whose needs exceed the COA’s ability to provide services as determined by the COA Director and the Transportation Coordinator.
 3. This policy excludes providing transportation in situations which the COA staff or drivers consider dangerous at their discretion (not limited to but including unplowed driveway and poor accessibility at either the client home or destination).
 4. The COA provides only curb-to-curb service.
 5. Medical rides are not provided to Boston or Cambridge at this time.

3. Transportation Coordinator

- The Transportation Coordinator (TC) is an employee of Carlisle working for the COA. All transportation provided by the COA is coordinated by the TC under the direction of the COA Director. The TC is responsible for ensuring that all qualified vehicles be properly maintained and that COA drivers are trained before using these vehicles. The TC works with the Lowell Regional Transportation Authority (LRTA – see Section 8) to ensure that LRTA guidelines are followed.
 1. The TC ensures that yearly preventative maintenance on qualified vehicles, as required by the Department of Transportation, is done.
 2. The TC ensures that qualified vehicles get annual Massachusetts sticker inspections.

- The TC compiles detailed daily and monthly statistics for LRTA reports and for COA tracking of transportation usage.

4. **Van Line**

- Clients make their service requests by calling the van line.
- If a client request is made with at least 2 business days of advance notice, the client will receive confirmation within 24 hours, if at all possible. With less notice, the client will receive confirmation as soon as possible.
- If the client gives less than 1 business day of advance notice, their request may not be fulfilled. However, the TC will check the driver schedule and assign a driver if one is available. Otherwise, the TC will make a reasonable effort to find a friendly driver. If unsuccessful, the TC will refer the client to other transportation alternatives (not paid for by the COA).
- Appointments and errands can only be scheduled for days that the COA office is open.

5. **Transportation Request Types**

- Personal appointments and errands
 1. Provide transportation to medical appointments.
 2. Provide transportation for personal shopping trips or errands for one or more clients.
 3. Provide transportation to recurring appointments (such as physical therapy) for a maximum of six weeks. Needs approval from the COA Director/TC after six weeks.
- COA-sponsored day trips or events
 1. The Director will establish a minimum Carlisle participation level for each event and transportation to the event. If the level is not reached, the event and/or transportation to it may be cancelled.
 2. The TC will determine how each request is filled, including the mode of transportation and, if applicable, the driver.
 3. Recurring COA-sponsored events include, but are not limited to, weekly shopping trips, monthly luncheons, breakfasts and coffees. Such events occur on the same day of the week or month on a regular basis.
 4. Individual COA-sponsored day trips or events
 - This includes, but is not limited to, day trips and plays. Such events may occur on any non-holiday weekday.
 - If the number of clients requesting transportation is less than or exceeds the limits of the vehicle, the TC will attempt to arrange carpooling with other event attendees.
 - Registration
 - A client's check, made out to the specified party and sent to the TC, is considered to be a non-refundable registration for an event. Once a check is sent, a client should assume he/she is registered unless notified by the TC or another member of the COA staff.

- A separate check is required for each trip or event. Each check must designate the event, date and the client's phone number.
- Cancellation
 - If a COA-sponsored day trip is cancelled by the COA, checks will be refunded.
 - If the Carlisle Public School is closed due to weather, COA events, including trips, are cancelled. Cancellation due to weather will be updated on the COA line (978-371-2895) or the Van Line (978-371-6690) by 7 a.m. the day of the event. Clients must check this phone number. The TC or Director will determine the availability and amount of refunds.
 - A refund is not available if a client cannot attend a trip/event for which payment has been received. However the client should call the COA to see if anyone on a wait list is interested.
- COA programs, trips and activities may have changes in time, place, pick up or event venue due to weather or circumstances otherwise out of the control of the COA.

6. Driver Guidelines

- Friendly drivers
 1. Friendly drivers (FDs) volunteer their services to assist in providing transportation to seniors and disabled Carlisle residents.
 2. Friendly drivers use their own vehicles. FDs are not covered by town insurance but by their own private auto/home/personal liability insurance.
- Paid drivers
 1. Paid drivers shall be able to communicate electronically.
 2. All paid drivers shall be trained to drive a COA qualified vehicle by an instructor designated by the TC. A driver cannot transport clients until the instructor has notified the TC of said driver's competence.
 3. Paid drivers are remunerated to drive a vehicle (either their own car or, if they have been trained, a qualified COA vehicle). The compensation is for the number of hours actually worked, with a minimum of three hours per day that they drive.
 4. Drivers using their own cars are eligible to receive compensation for mileage at the town-approved rate providing they submit their mileage requests along with their weekly time sheets.
 5. Paid drivers receive no overtime premium and are not paid on holidays unless a trip has been scheduled in advance.
 6. Drivers of COA-qualified vehicles are required to make sure the van is clean after each use.

- **Rules for Drivers**
 1. Each driver must have an up-to-date CORI check on file, a valid driver's license, and proof of safe driver record.
 2. A normal day for drivers will follow current COA office hours; however it may, on occasion, be expanded to include hours between 8 a.m. and 6 p.m. Unless a more limited schedule is cleared in advance with the COA Director or TC, drivers should be available to drive throughout their scheduled day.
 3. Most paid drivers shall be available at least one day per week for scheduled driving. If a driver is unable to work their scheduled shift, they shall inform the TC as soon as possible and, if possible, find another paid driver to take their shift.
 4. Backup paid drivers have no assigned shift but may be called by the TC or by another paid driver to cover additional client requests.
 5. If no rides are planned for a scheduled driver's day, the driver shall still be available (on-call) in case of last minute calls. If no rides are required during the on-call driver's shift, the driver will receive compensation for 2 hours.
 6. All drivers shall notify the TC and Director as soon as possible if they are not available to drive on a date to which they had previously committed.
 7. If a driver repeatedly declines requests during a time to which they had committed, the COA Director has the discretion to drop them from the list of drivers.
 8. If a driver fails to appear for an assignment more than once, that driver will be dropped from the list until re-instated by the COA Director.
 9. The Director and TC will determine driver eligibility after extended medical leave. A signed doctor's medical release may be required.

7. Transportation Fees

- The Director and the TC will determine transportation fees/suggested donations, which will be posted in each van and in the COA monthly newsletter.
- Parking fees are the responsibility of the client.

8. Lowell Regional Transit Authority (LRTA)

- The LRTA is a public, non-profit organization charged with providing transportation to the Greater Lowell area. It has been providing transportation reimbursements to the Carlisle COA since July 1, 2010. The yearly contract with the LRTA specifies certain duties the COA must:
 1. Provide operating statistics deemed necessary by the LRTA for the analysis of the service. A monthly report shall be provided outlining progress to date.
 2. Keep its books and records in accordance with generally accepted accounting principles and make them available to the LRTA upon a 30 day written notice.

- 3 . Arrange for required periodic vehicle maintenance appointments with the LRTA agent.
 - 4 . Be responsible for periodic vehicle checks, interior and exterior cleaning of vehicles and for accident and damage reports.
- The LRTA reimburses the COA monthly for services rendered and approved under the contract. Budget reports are due by the 15th of each month following the month reported. All fees collected by the COA must be reported to the LRTA in said reports.
 - Items of expense to be included in the monthly billing are limited to items listed in the Proposal Fiscal Year Budget. Each year a new fiscal budget will be sent to the COA.
 - All drivers must participate in four or more training sessions per year: Safe Driver, CPR, First Aid and Wheel Chair Lift, as offered/required by the LRTA.
 - Drivers must submit to pre-employment drug and alcohol testing and subsequent random drug and/or alcohol testing done by the LRTA.