

**RESOLUTION NO. 2013-26**

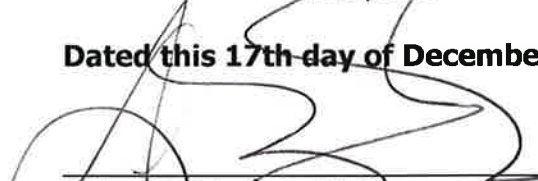
**A RESOLUTION BY THE  
MASON TRANSIT AUTHORITY BOARD,  
ADOPTING A VOLUNTEER DRIVER POLICY**

**WHEREAS**, Mason Transit Authority (MTA) operates a Volunteer Driver Program subsidized by the Lewis-Mason-Thurston Area Agency on Aging (LMTAAA) and needs to update its policy regarding service priority to comply with LMTAAA's reimbursement eligibility requirements, and

To best serve the community with limited funding, and operating within the allotted annual budget of the Volunteer Program, MTA will provide volunteer driver services to individuals primarily for medical trips, to out-of-county destinations and on an, as needed, assessed priority basis.

**NOW THEREFORE BE IT HEREBY RESOLVED**, by the Mason Transit Authority Board that the Volunteer Driver Policy which is attached hereto as Exhibit A and incorporated herein be established and adopted.

**Dated this 17th day of December, 2013.**

  
\_\_\_\_\_  
Deborah Petersen, Chair

  
\_\_\_\_\_  
Mike Olsen, Vice-Chair

  
\_\_\_\_\_  
John Campbell, Authority Member

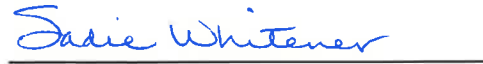
  
\_\_\_\_\_  
Herb Gerhardt, Authority Member


  
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Terri Jeffreys, Authority Member

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Randy Neatherlin, Authority Member

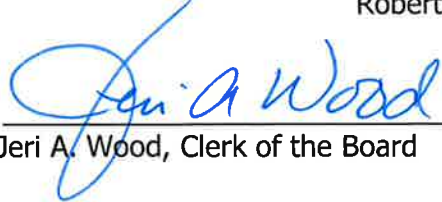
  
\_\_\_\_\_  
Tim Sheldon, Authority Member

  
\_\_\_\_\_  
Gary Volk, Authority Member

  
\_\_\_\_\_  
Sadie Whitener, Authority Member

APPROVED AS TO CONTENT:   
\_\_\_\_\_  
Brad Patterson, General Manager

APPROVED AS TO FORM:   
\_\_\_\_\_  
Robert W. Johnson, Legal Counsel

ATTEST:   
\_\_\_\_\_  
Jeri A. Wood, Clerk of the Board

DATE: 12-17-13



## VOLUNTEER DRIVER PROGRAM POLICY

### **1. Philosophy**

- a. The mission of Mason Transit Authority (MTA) is to provide transportation choices that connect people, jobs and community, increasing the quality of life in Mason County. The utilization of volunteers provides a cost-effective means of supporting MTA's mission. A well-managed volunteer program can contribute to improved quality and quantity of services available to Mason County residents. The Volunteer Driver Program (VDP) provides additional transportation options for meeting the needs of our community's aging population.

### **2. Purpose**

- a. It is the purpose of the MTA Volunteer Driver Program to provide transportation services to individuals' age sixty (60) years and above who are determined to be eligible for this service under the Washington State Senior Citizens Services Act, and/or provisions of the Older Americans Act of 1965, as amended.
- b. The VDP is meant to complement existing private and public transportation services. It is not meant to provide transportation for individuals who have services/insurance available to pay for the requested transportation or to replace the transportation that is already available.

### **3. Funding**

- a. The MTA Volunteer Driver Program is made possible through a partnership with, and funds awarded from, Lewis-Mason-Thurston Area Agency on Aging (LMTAAA); funding is provided through the Federal Older Americans Act of 1965, Washington State Senior Citizens Services Act, as well as donations from VDP service recipients and MTA match funds.
- b. This service is provided to eligible persons up to the point that funds budgeted within a calendar year have been exhausted. This service is not available once this funding has been exhausted. The funding is spread across the year in equal quarterly amounts. The quarters are: January 1 to March 31; April 1 to June 30; July 1 to September 30; and, ending October 1 to December 31 of each calendar year. Remaining funds within each quarter shall rollover into the consecutive quarter.
- c. Persons less than 60 years of age are not eligible to receive funds from the Federal Older Americans Act of 1965, as amended, or Washington State Senior Citizens Services Act. As part of the agreement terms between LMTAAA and MTA, match funds are provided, to include, when available, funding for service to non-eligible persons. Service for otherwise non-eligible persons will only be provided until funds budgeted within each calendar year has been

exhausted. This funding is spread across the year in equal semi-annual amounts, that being: January 1 - June 30 and July 1 - December 31 of each calendar year.

- d. The Volunteer Driver Program is dependent upon the availability of federal, state and local funds provided primarily through LMTAAA and, secondarily, MTA's match funds under the agreement budget. As such, the program is subject to unilateral reduction should the anticipated level of funding become unavailable.

#### **4. Organizational Structure**

- a. To minimize risk and maximize services to those we serve through volunteer utilization, the VDP will be managed by MTA staff, to include, but not limited to, the positions of Office Assistant and Outreach Manager, and said staff will be provided the necessary resources to devote to the coordination of volunteer services.
- b. A MTA employee will be assigned to the program and is responsible for managing the utilization of volunteers. This MTA employee will have a "working title" of Volunteer Coordinator. The Volunteer Coordinator will be offered training related to the management of volunteers and/or professional development and be encouraged to participate in professional organizations to increase management skills of volunteers.
- c. The **Volunteer Coordinator** will be responsible for managing the utilization of volunteers, services provided and dispatching of services with oversight provided by the Outreach Manager. Responsibilities include:
  - 1. Writing job descriptions for volunteer driver positions
  - 2. Recruitment, screening, and placement of volunteers
  - 3. Orientation and coordination of volunteer training
  - 4. Recognition, support and evaluation of volunteers
  - 5. Record keeping, including monthly reporting of volunteer miles, hours and trips
  - 6. Maintain driver and client files ensuring accuracy and confidentiality of records
  - 7. Knowledge and understanding of the Agency Council on Coordinated Transportation (ACCT) *Volunteer Drivers - A Guide to Best Practices*
  - 8. Coordination, with the Outreach Manager, of news releases, publicity, etc.
  - 9. Direct supervision of the volunteers
  - 10. This person does not have the working title of supervisor
  - 11. Screening and qualifying clients for uses of services
  - 12. Responsibly match volunteers with clients and dispatch rides
- d. **Outreach Manager** will be responsible for the direct supervision of the Volunteer Coordinator. Responsibilities include:
  - 1. Ensure adherence to MTA's Volunteer Driver Program Policy and Procedures
  - 2. Ensure adherence to the LMTAAA contract terms
  - 3. Knowledge and understanding of the Agency Council on Coordinated Transportation (ACCT) *Volunteer Drivers - A Guide to Best Practices*

4. Ensuring completion and accuracy of Volunteer Coordinators responsibilities
  5. Attend annual contract monitoring visits and provide files as requested, and implementing any identified corrective actions, program changes and/or recommendation within deadlines
- e. **Accounting Specialist** will be responsible for accurately preparing the monthly LMTAAA invoice and quarterly budget.
- f. **Finance Manager** will be responsible for direct supervision of the Accounting Specialist. Responsibilities include:
1. Ensure accuracy of Accounting Specialists responsibilities
  2. Ensure adherence to the LMTAAA contract terms
  3. Preparation of the annual contract program budget and staffing plan

## **5. Target Population**

- a. The target population criteria for the VDP is in accordance with the agreement terms and conditions established between LMTAAA and MTA and as outlined in program standards of the Aging and Long Term Support Administration Policy and Procedures Manual for Area Agency on Aging Operations, which is persons who:
1. Do not own a vehicle, or
  2. Cannot operate a vehicle, or
  3. Cannot afford to drive, and
  4. Cannot use public transportation, or
  5. Public transportation is not accessible or available to them.

## **6. Eligibility Determination**

- a. Qualified persons eligible to receive volunteer services are defined in accordance with Older Americans Act of 1965, as amended (OAA), and the Washington State Senior Citizens Services Act (SCSA), which are persons over the age of 60 who, because of financial or physical incapacity, have no appropriate means of transportation available to them; and as outlined in the Target Population Criteria according to the program standards of the Aging and Long Term Support Administration Policy and Procedures Manual for Area Agency on Aging Operations. In addition, persons who receive volunteer services must be a resident of Mason County. Eligibility is determined through use of the Participant Information Form (*see Appendix A*).
- b. Requests for services received by persons less than 60 years of age are not eligible under the Lewis-Mason-Thurston Area Agency on Aging Contract. When such inquiries are received, MTA will provide services on a first come, first served basis, (and if funding is still available) if the person:
1. Does not own a vehicle, or
  2. Cannot operate a vehicle, and

3. Cannot use public transportation, or
4. Public transportation is not accessible or available to them.

## **7. Service Prioritization**

- a. To best serve the community with limited funding, and operate within the allotted annual budget of the Volunteer Driver Program, MTA will provide volunteer driver services to individuals primarily for medical trips, to out-of-county destinations and on an, as needed, assessed priority basis.
  1. Trips provided will be for the purpose of medical care. Essential errands may be provided in conjunction with a medical trip only if it does not require going more than five miles from the pick-up point, destination point or roads traveled between the two points.
  2. Trip destinations must be outside of Mason County, unless the person is seeking life-sustaining medical treatment in Mason County and public transportation is not accessible or available to them. Life sustaining is defined as treatments which discontinuation would result in death, such as: dialysis, chemo/radiation therapy, surgery, ventilators, antibiotics or other medical procedures.
  3. Priority status will be defined in accordance with the OAA and SCSA, which states that priority will be given vulnerable, low-income, minority and/or limited English speaking elderly, as well as those meeting target population criteria as outlined in program standards of the Aging and Long Term Support Administration Policy and Procedures Manual for Area Agency on Aging Operations. Priority is assessed using a Participant Information Form and VDP Priority Determination Form (*see Appendix A and B*).
  4. Service priority will be given, as needed, to persons who have been assessed to have a priority status. Meaning, every effort will be made to use the funding allotted within each quarter in a manner to sustain the same level of service through the entirety of the quarter for persons with a priority status. Therefore, persons with priority status will have precedence for services provided through the Volunteer Driver Program.
  5. Trips will only be allowed to be scheduled up to two weeks in advance from the date the person makes a request.

## **8. Service Definition**

- a. Volunteer drivers perform their functions on behalf of or under the direction of the agency seeking their services. While the volunteer's vehicle is in use on agency directed business, the vehicle is considered a mobile work site and the volunteer an agent of the agency. The scope of the volunteer driver's relationship with the agency should be limited to the purposes of transporting and escorting (as needed) clients to and from medical services. Volunteer drivers in this program drive their own cars and receive reimbursement for expenses incurred, as follows:

1. Tolls and parking will be reimbursed for the actual values. If the cost item exceeds two dollars, the driver should submit a receipt with the claim.
2. Drivers should attempt to control program costs by scheduling their meals around trips and furnishing their own snack lunches. However, meals are a reimbursable cost if unforeseen delays occur and the trip exceeds four hours. Cost reimbursement for meals shall not:
  - i. exceed \$30.00 a day; or
  - ii. \$6.00 for meals before 12:00 P.M.,
  - iii. \$10.00 for meals between 12:00 P.M. and 6:00 P.M. and
  - iv. \$14.00 for meals after 6:00 P.M.
3. Mileage is variable with the cost of fuel. MTA will set the mileage reimbursement rate and so inform the drivers prior to any commitment of the trip. The mileage allowance shall not exceed the IRS reimbursable level.
4. MTA will not reimburse drivers for fines resulting from illegal operation of the vehicle, i.e., traffic or parking violations.

## 9. Minimum Requirements for the Volunteer Driver Program

- a. **Insurance Coverage** - Each person volunteering his/her services and his/her vehicles in the Volunteer Driver Program shall meet the State requirements as to motor vehicle policy or bond, as the volunteer's personal insurance is the primary liability protection. The following minimum coverage is recommended by the State of Washington in the Revised Code of Washington (RCW 46.29.090):

1. \$25,000 bodily injury, each person
2. \$50,000 bodily injury, each accident
3. \$10,000 property damage

Volunteers will provide proof of coverage that will be satisfactory to the transportation provider. MTA will maintain excess automobile insurance which supplements auto insurance coverage for each volunteer driving his/her own vehicle.

- b. **Volunteer Driver Selection** - Transportation providers offering a volunteer transportation component should assure that the volunteer drivers are reliable and able to drive safely. If at any time MTA deems that a volunteer driver is not performing his/her duties in a safe and reliable manner, at the sole discretion of MTA no further volunteer services will be assigned, including those that have been ongoing, pending determination by the volunteer coordinator. Selection of volunteer drivers will be based upon the following criteria:
1. Prospective volunteer should have an appropriate and valid Washington State driver's license.
  2. Assurance that the prospective volunteer has a safe driving record; at a minimum the volunteer should have had no at-fault accidents or moving violations in the past three years.
  3. Assurance that prospective volunteer has no criminal history record or record of Child or Adult abuse.
  4. Assurance that prospective volunteer has State established minimum required insurance coverage.
  5. Assurance by prospective volunteer that his/her vehicle is mechanically sound.

6. Assurance by prospective volunteer that he/she is physically capable of safely driving their vehicle and that medications are not being taken that affect driving ability. Additional assurance may be requested in the form of a letter provided by the volunteer's physician.
7. Assurance that prospective volunteer's vehicle has seat belts; that the volunteer will use seat-belts at all times and will require compliance by their passenger(s) of Washington State Laws regarding the wearing of seat belts.
8. Assurance by the prospective volunteer that he/she will maintain required records, (e.g., verification of trip records.)
9. Assurance that the prospective volunteer will refrain from accepting any donations from clients. Self-addressed envelopes are provided for clients wanting to make voluntary donations which protects the client's right to confidentiality and which safeguards the funds from theft or fraud.
10. A "Statement of Understanding" is executed and acknowledged with their signature.
11. Assurance that the prospective volunteer will maintain the conditions of his/her selection in Section 9; paragraph B, items 1-11, as listed above.

- c. Volunteers Driver Orientation** - The agency should provide orientation to volunteers prior to their providing service (*see Appendix C, Exhibits A-F*).

Orientation will include:

1. Information about the agency
2. The purpose of the Volunteer Transportation Program
3. The role volunteers play in the Transit System
4. Review of the program policy and procedures
5. An explanation of the job description, reporting and evaluation process

- d. Volunteers rights and responsibilities** - The agency should provide information volunteers with information during orientation regarding their rights and responsibilities.

Rights and Responsibilities of Volunteers include:

1. To maintain their vehicle in safe operating condition
2. To assure the use of seat-belts by passengers and volunteer
3. To maintain client confidentiality
4. To maintain the client's right to self-determination
5. To exercise due care in operating the motor vehicle
6. To notify the agency in the event of an accident
7. To appropriately use Disabled Parking Permit
8. Reimbursement for allowable expenses incurred
9. Reporting requirements
10. Evaluation
11. Agency contact and supervision

e. **Volunteers Driver Training** – Volunteers should be provided with the appropriate training to conduct services in a safe manner. Mandatory training to be completed within sixty (60) days following the initial driving assignment:

1. Passenger Assistance & Sensitivity Training (ADAPT or PASS)
2. Defensive Driving Course

Special training opportunities are strongly encouraged for:

1. CPR/First-Aid

The agency will encourage the program to coordinate training with other community programs in order to maximize the volunteer's knowledge about the integration with the area service delivery system. Cost of such training will be reimbursed by MTA.

f. **Volunteer Driver Review** - On an annual basis, each volunteer driver will be reviewed in conference to:

1. Update application information with regard to name, address and emergency contact
2. Driver's license information
3. At-fault accidents and traffic violations
4. Vehicle information and vehicle inspection
5. Health status
6. Certification statement
7. Review performance by conducting a ride-a-long driver evaluation and review of job responsibilities

If at any time the volunteer driver is found to have not maintained the conditions of his/her selection as defined in Section 9; paragraph B, items 1-11, as well as pass their annual review as defined in Section 9; paragraph F, items 1-7, then the driver will be suspended from provided services until the item(s) are in compliance with this policy.

Any accident or reportable incident involving a volunteer performing agency-sponsored activity should be reported and investigated immediately by the agency. A report of the accident should be filed in the volunteer's personnel file.

**Participant Information Form**

**Project:** Transportation  
**Location:** Mason County

**Intake Date:** \_\_\_\_\_

**Name:** \_\_\_\_\_  
Last First Middle

**Address:** \_\_\_\_\_  
Street  
 \_\_\_\_\_  
City ZIPcode **Phone:** \_\_\_\_\_

**Date of Birth:** \_\_\_\_\_ **Gender:**  Male  Female  
Month-day-year (must be age 60+)

**Emergency Contact:** \_\_\_\_\_  
Name  
 \_\_\_\_\_  
Phone Relationship

**Target Population Criteria\***

- 1. Client has a vehicle -or-  Yes  No
- 2. Client can drive -or-  Yes  No
- 3. Client can afford to drive and  Yes  No
- 4. Client can use public transportation -or-  Yes  No
- 5. Public transportation is available or accessible  Yes  No

\*To be eligible, clients must minimally check "no" to 1, 2 or 3 and 4 or 5 for purposes for which transportation is being provided under the OAA/SCSA funded program.

**Race:**  
 Black/African American  Hispanic  American Indian/Native Alaskan  
 Asian/Pacific Islander  White  Other \_\_\_\_\_

**Lives alone?**  Yes  No  
**Speaks English**  Yes  No  Limited

**Gross monthly income less than \$931 for a single person or less than \$1,261 for a couple**  Yes  No

**Vulnerability Assessment**

Assistance needed with these activities:

- Bathing
- Dressing
- Eating
- Transportation
- Toileting
- Transferring
- Walking
- Financial Management
- Phoning
- Driving
- Heavy Housework
- Medication Management
- Cooking
- Shopping
- Light Housework

**Mason Transit Authority  
Volunteer Driver Program Priority Determination Form**

NAME \_\_\_\_\_ DATE \_\_\_\_\_ SCORE \_\_\_\_\_

*{Priority will be given vulnerable, low-income, minority and/or limited English speaking elderly}*

- A. Unable to perform one or more daily activities (as indicated on the Participant Information Form) without assistance due to physical, cognitive, emotional, psychological or social impairment.  
  - 1 – 4 vulnerability factors (1 point)
  - 5 – 9 vulnerability factors (3 points)
  - 10 or more vulnerability factors (5 points) \_\_\_\_\_
  
- B. Unable to use public transportation for the following reason(s):
  - Disabling condition which prevents long periods of sitting, cognitive impairment or sight impairment (1 point) \_\_\_\_\_
  
- C1. Income is at or below the 2013 Federal Poverty Level (FPL). (5 points)  
(= or < \$958 for 1 person, = or < \$1,293 for 2 people) \_\_\_\_\_
  
- OR
  
- C2. Income is at or below 150% of the 2013 FPL (3 points)  
(= or < \$1,436 for 1 person, = or < \$1,939 for 2 people)
  
- D. No support system to provide transportation. (2 points) \_\_\_\_\_
  
- E. Identifies as being of minority ethnicity/race (1 point) \_\_\_\_\_
  
- F. Limited English speaking (1 point) \_\_\_\_\_
  
  
- TOTAL POINTS** \_\_\_\_\_

***EXHIBIT A - DRIVER CONDUCT***

1. All volunteer drivers will act in a professional manner at all times.
2. Reports of staff or volunteer driver misconduct will be cause for immediate suspension from client service. Confirmation of misconduct shall be cause for removal of the volunteer driver involved from serving clients. Mason Transit Authority (MTA) may be required to report all incidents to the state or federal funding agencies.
3. If the state funding agency and/or MTA receives complaints regarding any volunteer driver transporting riders, and/or it is determined that the volunteer driver is not performing the service in a safe, reliable or responsible manner and corrective action has not resulted in improved performance, MTA will remove the volunteer driver from service to riders.
4. If any volunteer is suspended from service due to complaints or a determination that the person is not performing the service in a safe, reliable and responsible manner, they will not return to service until MTA has developed a plan of improvement.
5. Volunteers shall perform the following minimum levels of service; A volunteer driver shall:
  - a. Wear, or have visible, easy to read proper organizational identification;
  - b. As appropriate to the needs of the rider, exit the vehicle to open and close doors when passengers enter or exit the vehicle and provide assistance as necessary to or from the main door of the place of destination;
  - c. Properly identify and announce their presence at the entrance of the building at the specified pick-up location if a curbside pick-up is not apparent, or with attending facility staff;
  - d. Assist the passengers in the process of being seated, including the fastening of the seat belt, when necessitated by the rider's condition;
  - e. Confirm, prior to allowing any vehicle to proceed, that all passengers are properly secured in their seat belts;
  - f. Provide an appropriate level of assistance to passengers, when requested, or when necessitated by a passenger's condition;
  - g. Provide support and direction to passengers. Such assistance shall also apply to the movement of wheelchairs and mobility-limited persons as they enter or exit a facility or vehicle as applicable. Such assistance shall also include stowage by the driver of mobility aids and folding wheelchairs;
  - h. Be clean and maintain a neat appearance at all times;
  - i. Be polite and courteous to riders; riders shall be treated with respect and in a culturally appropriate manner when receiving transportation services. MTA will notify the volunteer driver of any known cultural issues significant to providing transportation services; and,
  - j. Respect passengers' rights to confidentiality.
6. A volunteer driver shall not:
  - a. Make sexually explicit comments, or solicit sexual favors, or engage in sexual activity;
  - b. Solicit or accept controlled substances, alcohol, or medications from riders;

- c. Solicit or accept money from riders;
- d. Use alcohol, narcotics or controlled substances, or be under the influence, while performing as a volunteer driver. Prescribed medication can be used by a driver as long as his/her responsibilities as a volunteer driver can still be performed in a safe manner and MTA has written documentation that medication will not impact the ability of the driver;
- e. Eat or consume any beverage while operating the vehicle or while involved in rider assistance;
- f. Smoke in the vehicle when riders are present. This rule also applies to clients and a client's escort;
- g. Wear any type of headphones while performing as a volunteer driver;
- h. Be responsible for passengers' personal items.

### **EXHIBIT B - CONFIDENTIALITY**

1. The principal of confidentiality is basic to the maintenance of professional ethics and community respect. All staff and volunteers of MTA have a set of ethical responsibilities by which they are bound to the rider, the community and themselves. MTA riders act in good faith, expecting their circumstances and personal matters to remain confidential and MTA is obligated by law and ethics to reciprocate. Confidentiality of rider information is maintained for the protection of the rider and for MTA.
2. Staff members, including volunteers, will use the following procedures. For the purposes of these procedures a "rider" is defined as a person registered as a program participant. Registration is accomplished by completion of a Participant Information Form (PIF).
  - a. All staff members will take responsibility for protecting the confidentiality of all riders and sign a confidentiality form to be maintained in their personnel file. New staff members will receive instruction in these confidentiality procedures.
  - b. All written and unwritten information concerning riders of MTA are considered as confidential.
  - c. All written information regarding the riders of MTA will be maintained in files. Only those staff members with a "need to know" will have access to these files. No staff member may remove rider files from the office without authorization from the staff member's supervisor.
  - d. When it is necessary for a member of the staff to communicate information about a rider to another person or agency, an Authorization to Obtain/Release Information Form will be signed by the rider or their legal representative. The signed release will be kept in the rider's permanent record. If the rider is unable to give written consent, then the staff member releasing the information will document the circumstances.
  - e. When rider-related materials, i.e., lists, log and files are used outside the office, staff members are responsible and must take appropriate steps to safeguard the materials.
  - f. In emergency situations, when it is not possible to have a form signed, a verbal release may be given by the rider or their legal representative. The staff member who receives the verbal release will make a note in the rider's file and will obtain the written release as soon as possible.

- g. A signed release will not be needed when, in general, personal information shall not be used or disclosed by any person or organization without the informed consent of the individual who is the subject or the information.
  - h. When MTA staff is working with a rider and finds it necessary to obtain written information from another person or agency, it will be necessary to obtain a signed release from the rider or representative. This release will indicate that the rider or representative has given permission for release of information to MTA.
  - i. When MTA staff either receives requested written information or releases written information about a rider to another person or agency, a written or verbal follow-up will be given to the rider. This follow-up will inform the rider as to what information was released or obtained and what progress has been made in helping with his/her individual situation. A record of the follow-up will be kept in the rider's file.
  - j. When MTA staff receives unsolicited information from the rider, the staff member may legally need to share that information, e.g., suspected abuse. The staff member may also ask the rider for permission to make an appropriate referral, i.e., Gatekeeper function.
  - k. When MTA staff receives unsolicited information about a rider from family members, Gatekeepers, etc., the staff member may share the information with the rider. Professional judgment will determine what to share.
  - l. The fact that a situation has been made public through any of the new media does not alter the fact that this person still has confidentiality privileges with MTA. For example, if a rider has been having difficulties with a given problem and is arrested, MTA confidentially procedures will be maintained.
3. The major exception to this policy is that the information may be used for purposes directly connected with the administration of the program that has collected the information. Such purposes include, but are not necessarily limited to; determining eligibility, providing the services and participating in audits of the program. An example of using personal information in the course of providing a service would be staff member giving the name and other necessary information about an individual desiring a specific service to an organization than can provide that service.

### ***EXHIBIT C - DONATIONS***

1. Persons who receive services funded by Title III of the Older Americans Act must be given a free and voluntary opportunity to contribute to the cost of services provided. The same opportunity must be extended to persons who receive SCSA-funded services that are not subject to a means test. Other persons in need of special transportation regardless of funding source should be afforded similar opportunities, as the persons in the categories above. The service provider must protect each person's privacy with respect to his or her contribution, establish procedures to safeguard and account for all contributions made by users of the service and use all such contributions to expand the service that received the contribution.
2. Envelopes are provided by Volunteer Drivers for the purpose of ensuring confidentiality.

3. MTA will not differentiate among individuals based on their ability, or inability to make a donation. No otherwise eligible person may be denied service because he/she will not or cannot contribute to the cost of service.
4. Volunteer drivers are not allowed to receive donations. In order to assure that riders are afforded the opportunities described above, they may be mailed a detailed accounting of volunteer trips provided, length of the trip, and a suggested donation rate. Those factors may be totaled in the form of an aggregate suggested donation. A copy of the aggregate accounting can be sent to persons who have agreed to pay for the transportation services. Included are family members, personal representatives, friends, and agencies that have agreed to pay at the suggested donation rate.

#### **EXHIBIT D - ABUSE, NEGLECT, ABANDONMENT & EXPLOITATION**

1. Volunteers will be trained to report concerns immediately to the office of the Department of Social & Health Services that is responsible for Adult Protective Services and provided with an report form upon orientation. The staff member, including volunteers, shall also report concerns to his/her supervisor and/or Volunteer Driver Coordinator to receive further instructions as needed. People in certain professions are mandated to report suspected abuse, neglect, exploitation or abandonment of persons sixty (60) years of age or older who have a functional, mental, or physical inability to care for or protect themselves. Persons who are required to report must call Adult Protective Services immediately and follow-up with a written report within ten (10) days. Those mandated to report include:
  - a. Police officers
  - b. Social workers
  - c. Employees/Volunteers of welfare, mental health, or health agencies, or congregate care long-term care facilities
  - d. Licensed health care providers
  - e. Employees of the Department of Social & Health Services
  - f. Employees of social service agencies
2. Abuse and neglect of older persons includes several categories of acts and/or omissions generally referred to as abuse, neglect, exploitation and abandonment. Signs of potential abuse or neglect include an elderly person:
  - a. with bruises, welts or burns or evidence of physical restraints;
  - b. who appears over- or under-medicated;
  - c. with inadequate food or water, or with unclean clothes or bedding;
  - d. whose caregiver abuses alcohol or is emotionally unstable;
  - e. who previously has had excellent credit or resources but now seems unable to meet expenses;
  - f. whose caregiver is under severe stress such as illness, unemployment or family problems;
  - g. living in a family with a history of violence such as child or spouse abuse; and
  - h. who is not permitted visitors or direct, private communication with others.

### 3. Definitions

- a. Abuse: An act of physical or mental mistreatment or injury that harms or threatens a person through action or inaction by another individual. Abuse may be physical, sexual, verbal or emotional. "Medical" abuse refers to over-medication or withholding of medications or other needed assistance in order to control the older person. Signs of abuse:
  - i. Suspicious bruising or other injuries to arms, face or head
  - ii. Marks from tying or other restraints
  - iii. Purposeful isolation
  - iv. Unwarranted sedation
  - v. Withholding of food, water or medication (without consent)
  - vi. Unexplained depression or anxiety
  
- b. Neglect: A pattern of conduct resulting in deprivation of care necessary to maintain minimum physical and mental health. Neglect occurs when a caregiver does not provide enough care and support to meet the person's individual needs for physical emotional well-being. (The situation may be "self-neglect" when the needs of an older person are not being met, but here is not an identified caregiver.) Signs of neglect:
  - i. Inadequate food or water
  - ii. Un-cleanliness
  - iii. Serious bedsores
  - iv. Social isolation
  - v. Lack of proper medical or dental care or equipment
  - vi. Unsanitary conditions
  - vii. Unpaid bills
  - viii. Untreated mental illness
  
- c. Exploitation: Illegal or improper use of a vulnerable adult or that adult's resources for another person's profit or advantage. Exploitation may involve obtaining access to and misusing an older person's income, financial resources or real property, obtaining money fraudulently, charging for services not provided, misuse of a Power of Attorney, and emotional pressure to change a will to sign over property. Signs of exploitation:
  - i. Sudden change in an older person's spending habits
  - ii. Unexplained loss of resources or valuables
  - iii. Overdrawn accounts
  - iv. Loss checks or passbooks
  - v. Unusual or suspicious withdrawals from bank
  - vi. An unfit person moving in
  - vii. Sudden quit-claim deeds of property
  - viii. Suspicious or unauthorized use of an older person's credit card
  
- d. Abandonment: Leaving a vulnerable adult without the means to obtain food, clothing, shelter or health care. This form of abuse involves a recognized caregiver who has been giving regular and substantial care to an older person, and willfully discontinues the care without assuring adequate replacement or giving appropriate notice to responsible parties. Signs of abandonment:

- i. Sudden departure of caregiver
- ii. No movement in or around an older person's home
- iii. No answer to telephone
- iv. Uncollected mail or newspapers piling up
- v. Older person suddenly discontinuing routine social contacts

**EXHIBIT E – REPORTING**

1. Volunteers are required to report services provided, to include: date trip provided, person served, pick-up and destination address, mileage, trips and hours. Reports are required to be accurate and submitted on the first day of each month for the previous month's service provision.



**VOLUNTEER DRIVER TRAVEL EXPENSE CLAIM FORM**

Date	Passenger & Address	Odometer Start	Odometer Stop	Total Miles	Destination	1-Way Trips	Trip Purpose	Hours
3/28/2010	JANE DOE	26354	26420	66	GROUP HEALTH	2	A-A	3
	123 DOLLY LANE				700 LILLY ROAD			
	SHELTON, WA 98584				OLYMPIA, WA 98584			
3/28/2010	JOHN SMITH	26615	26754	149	W.W. ONCOLOGY	3	A-C-A	5
	123 DEER RD				4525 3RD AVE OLYMPIA, WA			
	BELFAIR, WA 98528				FRED MEYER IN SHELTON			
3/28/2010	SALLY AND JOE SMITH	26764	26909	145	VISTA CARE ONCOLOGY	6	AA-CC-AA	5
	321 MICKEY MOUSE RD				141 LILLY RD OLYMPIA, WA			
	BELFAIR, WA 98528				QFC IN BELFAIR			
3/28/2010	JANE DOE	26955	➔		DOCTORS CLINIC			
	123 DOLLY LANE				2526 WHEATON WAY			
	SHELTON, WA 98584				BREMERTON, WA			
3/28/2010	SALLY SMITH	➔	27125	170	DOCTORS CLINIC	4	AA-AA	3
	321 MICKEY MOUSE RD				2526 WHEATON WAY			
	BELFAIR, WA 98528				BREMERTON, WA			

I, the undersigned, do hereby certify that the information provided is true and correct; and that no part of this claim has been/will be paid by any other agency or individual.

Signature SIGNATURE REQUIRED TO PROCESS CLAIM FORM! Date \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Mail or deliver to:  
 Mason Transit Authority  
 790 E John's Prairie Rd  
 PO Box 1880  
 Shelton WA 98584  
 (360) 426-9434 or (800) 281-9434

Trip Purpose Legend	Office Use Only
Enter Corresponding Letter for Each Trip Purpose in Trip Purpose Column	Total Miles _____
A - Medical	Mileage Rate <u>x</u>
B - Adult Daycare	Mileage Reimbursement <u>\$</u>
C - Essential Errands	Other reimbursed expenses <u>+</u>
D - Social Services	<u>+</u>
E - Nutrition	<u>+</u>
F - Employment	Total Reimbursement = <u>\$</u>
G - Recreation	Total 1-Way Trips _____
H - Education	Total Volunteer Hours _____
# of trip purposes must equate # of 1-way trips	Approval Signature _____

## **EXHIBIT F - VOLUNTEER DRIVER EXPENSES**

1. Meal Reimbursement Policy is as follows: MTA will only accept:
  - a. Original restaurant meal receipts – or –
  - b. Original grocery store/convenience store receipts for prepared, ready-to-eat food items that will be eaten by the volunteer driver immediately. Any extra items for spouses or clients will not be reimbursed nor will additional food items be reimbursed, such as cartons of ice cream, canned goods or food items.
  - c. Reimbursement cannot be paid when Food Stamps are used to pay for reimbursable meal expenses at restaurants or for reimbursable ready-to-eat food items purchased from grocery stores/convenience stores.
  - d. All receipts must have a date and time on them that corresponds to the time span of the authorized trip.
  - e. Receipts for meals will only be reimbursed when volunteering for at least a four (4) hour time period. Also, please note that:
    - i. Meals are reimbursed only for the volunteer.
    - ii. Meal reimbursements are not authorized for spouses, significant others or clients.
    - iii. MTA does not reimburse for tobacco or alcohol products.
  
2. Incidental Expenses Policy is as follows: In addition to meals, MTA will reimburse for incidental travel expenses related to the non-automobile costs the volunteer incurs. Examples are:
  - a. Parking
  - b. Highway and/or bridge tolls
  - c. Ferry Tolls
  - d. MTA will reimburse for motel/hotel expenses, pre-authorized, as a result of inclement weather conditions or emergency circumstances.

In the case of either one (1) or two (2) above, the expenses must be documented by original receipts that correspond to the time span of the authorized trip.

3. Automobile expenses that will not be reimbursed include :
  - a. Traffic fines
  - b. Parking fines
  - c. Towing charges
  - d. Gasoline, etc.