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Driver Selection and Training in Human Service Transportation Programs

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In recent years, because of increasing personal transportation costs and a decline in available public transportation, human service agencies have found themselves spending more time and money transporting clients to and from essential human services. As a result, such agencies need increased knowledge about transportation. While agency managers often have a general understanding of basic transportation concepts, they lack an understanding of risk management and the key to a successful risk management program, the drivers. An analysis is presented that is designed to help the various human service agencies to identify (a) the passenger-assistance and driving skills necessary to transport specific program beneficiaries, (b) appropriate screening procedures for selecting drivers, and (c) various programs available to train drivers. Because human service transportation is so specialized, the qualifications and characteristics desired in drivers of human service vehicles differ considerably from those of drivers of other types of vehicles (such as truck drivers). Drivers for human service agencies should have an understanding and tolerant attitude toward others, patience, an agreeable nature, concern for others, and basic first-aid skills.

In recent years, human service agencies have moved into a void in the American transportation system--the provision of transportation services for the disadvantaged who can neither drive themselves nor use existing public transportation. Transportation programs of human service agencies, unlike traditional transportation programs, are mission oriented. Human service transportation programs are designed to provide target groups with adequate medical care, shopping facilities, nutritional services, and recreational facilities, the opportunities for which most people depend on the private automobile or traditional transit.

A recent study done by the University of Tennessee illustrates that a range of human service transportation options is important (1). The need for transportation services in general can be divided into seven distinct user segments:

1. Automobile users--Individuals who have driver's licenses, own automobiles, and can afford to operate their automobiles (although some individuals may require special controls);
2. Conventional public transportation users--Individuals without access to automobiles who are physically able to use public transportation, have conventional public transportation service available, and can afford to use the service;
3. Subsidized public transportation users--Individuals without access to automobiles who are physically able to use public transportation, have public transportation available, but are not able to afford the available service;
4. Expanded public transportation users--Individuals without access to automobiles who could use public transportation service if it were available;
5. Curb-to-curb users--Individuals without access to automobiles who physically cannot use public transportation but could use a service that came to their homes;
6. Door-through-door users--Individuals who are not able to leave their homes without assistance or escort; and
7. Ambulance users--Individuals who need ambulances and their paramedic escorts to take trips of any type.

Unlike public transportation companies (publicly

or privately owned) that are in the business of selling the specific type of transportation service they provide, human service agencies are only concerned with obtaining the specific transportation services their target groups need to have access to a wide range of human services. Human service agencies view themselves as advocates for various constituencies. Thus, a human service agency may find itself helping one program beneficiary to obtain retraining to drive a vehicle with hand controls, a second beneficiary to obtain information about available public transportation options, and a third to obtain vouchers that can be used to pay for a ride by taxicab or ambulance.

Where adequate public transportation is not available, the agency must develop options. Options may include the use of volunteers; the use of part-time employees using their own vehicles to transport program beneficiaries; purchase of service from various providers (ranging from churches to school-bus operators to taxi companies to private individuals); reimbursement of family, friends, and neighbors who provide services; and, in some cases, agency-owned and agency-operated vehicles. The type of service offered depends on the special needs of the program beneficiaries (Can they ride in a standard vehicle? What kind of passenger assistance is required?) and the cost of providing the service.

This paper is designed to help the various human service agencies to identify and understand both the driving and passenger-assistance skills that are needed to transport specific program beneficiaries. It also seeks to identify appropriate screening procedures to select those drivers who are most likely to be compatible with the objectives of the agency's program and to identify the various programs available for training drivers to provide the required passenger support services.

There are two major purposes in developing effective driver selection and training programs:

1. Drivers who are not compatible with the objectives of the agency's transportation program seriously reduce the effectiveness of the program and unduly escalate cost.
2. Poorly selected and untrained drivers cause accidents that lead to accidental injury and death to the agency's passengers, which in turn lead to higher insurance rates.

DIFFERENCES IN DRIVER SELECTION AND TRAINING NEEDS

The primary difference in the driver selection and training procedures that should be used is not in the type of agency nor in the way the agency is organized or financed but rather in the mix of driver skills that best serves the agency's customers. This distinction is conceptually shown in Figure 1.

As this conceptual model shows, a truck driver is concerned with driving and has no passenger-assistance duties. A transit bus driver is primarily responsible for driving and is required to give only minimal time to collecting fares, maintaining discipline, providing passenger information on routes and schedules, and, in some cases, physically helping a passenger. A school-bus driver, on the other hand, must spend more time assisting the passengers, since discipline is more of a problem with children and the children must be protected when traveling to or from the bus, especially across a busy street. An ambulance driver is required to be well trained in paramedic and first-aid skills, since the primary purpose of the ambulance service is emergency medical service in conjunction with transportation.

Drivers for various human service programs have responsibilities that range between those of the paramedic and those of the school-bus driver. The duties and skills of a driver transporting Head Start children or operating a church bus to a local Sunday school are much like those of the typical school-bus operator. On the other hand, a program that transports the severely handicapped, the elderly, or autistic children may require that the driver spend almost as much time in passenger-support duties as the ambulance driver.

Thus, it is important that the human service agency realize that "driver" is not a generic term that applies to the full range of driving and passenger-assistance responsibilities. The potential responsibilities of human-service-agency drivers include skills in the following categories: general driving, accident avoidance, passenger assistance, human relations, emergency first aid, nonmedical emergency, and basic transportation operation.

If being a driver were a generic responsibility, then the many truck-driving schools could be used to train ambulance drivers, human service drivers, bus

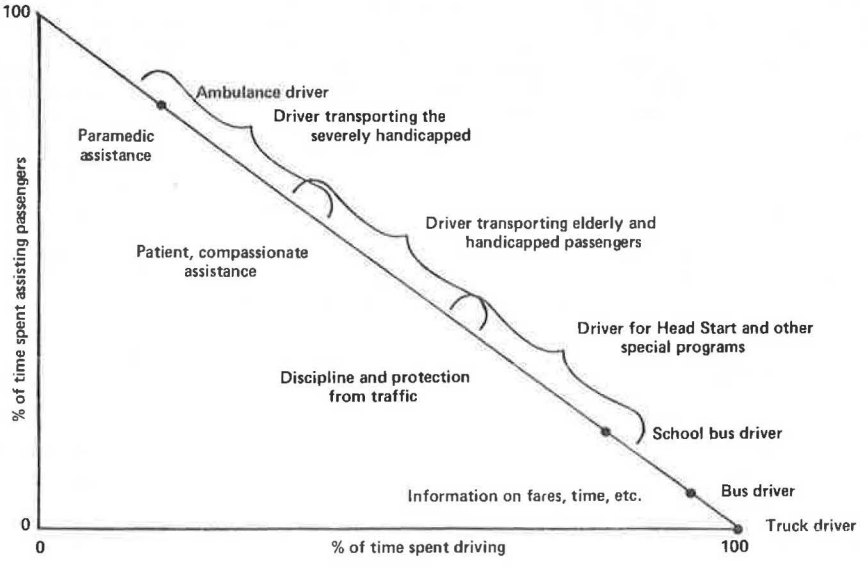

Figure 1. Sliding scale of driving-nondriving duties.

drivers, and truck drivers. If "passenger assistance" were a generic skill, then the American Red Cross, which teaches first aid and paramedic skills, could be used to train school-bus drivers and transit operators.

In some programs (ambulance services and services to the severely handicapped), the passenger assistance that must be rendered is primarily an immediate professional medical response. On the other hand, passengers who are frail, have limited mobility, or have poor hearing or sight need patient understanding and gentle assistance, including constant verbal reassurance. Young schoolchildren and children in Head Start need an entirely different type of assistance. Each of these different types of passenger assistance requires a different personality type, a different skill, and different training.

IMPORTANCE OF DRIVER SELECTION AND TRAINING

Motor-vehicle transportation is subject to accidents, and the cost of these accidents is great, not only for the individuals involved but also for society. During 1977, there was an accident for every 5.4 registered vehicles. One out of every 4444 persons died, and 1 out of every 39 persons was injured in a traffic accident.

The cost of accidents is very large. Costs arising from property damage, legal fees, medical and hospital bills, funeral bills, loss of income during convalescence, and the administrative cost of insurance were almost $48 billion, or $332.45 for every registered vehicle on the highway. As a consequence, accident costs are a large part of the cost of operating a vehicle, in many cases exceeding fuel cost. Driver error accounts for 90 percent of all accidents.

Although all drivers will probably be involved in an accident sometime, some drivers are chronically involved in accidents. The Survey Research Center of the University of Michigan states that 6 percent of drivers are involved in 45 percent of all traffic accidents (2).

Many researchers believe that people "drive the way they live" (3). Individuals with emotional, psychological, depressive, suicidal, highly aggressive, or antisocial tendencies and negative or rebellious attitudes tend to drive the way they live and are frequently high-risk drivers. People who do not adhere to general societal rules probably will not adhere to general traffic rules.

Driver-training programs are only as effective as the motivation of the person to be trained. Students from high-school driver-training programs, who view the training as a necessary hurdle to getting a license, receive very little benefit from driver training, whereas drivers in the 35-55 age group who take the National Safety Council defensive driving course can reduce their accident involvement by as much as 50 percent (4).

The key to a good transportation program is to select individuals who live safely and drive safely and who identify with the mission of the agency. These individuals can then be effectively trained to provide human service transportation and to provide it safely.

A human service transportation program is only as good as its driver selection procedures and the subsequent training of the drivers it selects. The selection process should involve a thorough examination of each applicant to document the applicant's qualifications.

Traits, rather than demographic classifications, should be used during the screening process. The following traits should be considered in examining each applicant:

1. Four or more years of driving experience;
2. Absence of alcohol and/or drug abuse;
3. Good physical condition (applicants should not be subject to chronic conditions that might cause a sudden loss of control--such as epilepsy, diabetes, and heart problems--and functional rather than chronological age should be used);
4. Good driving record with few violations and accidents (no more than one accident or violation in the preceding three years, which should be weighed by driving exposure);
5. Predictable job history (frequent, unexplained job changes have been associated with poor driving performance); and
6. A willingness to absorb training, accept directions, and identify with the mission of the agency.

Depending on the target groups transported, the following traits should be considered: (a) patience with children; (b) emotional stability; (c) an understanding and tolerant attitude toward others, especially older or handicapped individuals; (d) independence and responsibility; (e) agreeable rather than aggressive nature; (f) safety consciousness; (g) reality orientation; and (h) ability to accept blame and to recognize personal limitations. These characteristics provide agencies with a guide to driver selection that allows flexibility; it must be emphasized, however, that management's responsibility is to select the best-qualified candidate if accidents are to be minimized.

TASK ANALYSIS

Driver is not a generic term, especially when a large part of the driver's responsibility is rendering assistance to passengers. Therefore, the human service agency must be able to define what is expected of the driver before detailed selection criteria can be established and before the required training can be prescribed.

The tasks that a human service driver may be expected to perform can be grouped in the seven general skill areas mentioned earlier. These skill areas can be described as follows:

1. General driving skills allow the driver to control the vehicle adequately.
2. Accident avoidance skills help the driver to avoid dangerous situations created by other drivers.
3. Passenger-assistance skills can be used to assist handicapped individuals in getting to the vehicle as well as in boarding it. Securing passengers in the vehicle is also a very important consideration.
4. Human relations skills help the driver to maintain discipline, control the driver-passenger relationship, and instill confidence in the passengers.
5. Emergency first-aid skills help the driver to respond to medical emergencies such as falls, accidents, heart attacks, or epileptic spells.
6. Nonmedical emergency skills involve developing contingency plans for protecting passengers in case of occurrences such as vehicle breakdowns and flat tires.
7. Basic transportation operation skills help the driver understand the cost of operating vehicles and steps that can be taken to control cost.

It is recommended that all drivers be proficient in general driving skills and have specific skills

required by local conditions. In addition to controlling their own vehicles, drivers must be able to predict what other drivers will do and to avoid accident-causing circumstances created by other drivers. Since a major reason for providing human service transportation is that the passengers cannot use existing vehicles and services, drivers of human service vehicles must be able to assist passengers. Drivers must have passenger-assistance skills to operate special equipment that may be needed by handicapped individuals. It is also recommended that drivers understand the characteristics of human relations in dealing with passengers. If an accident should happen, drivers must be able to administer a minimum level of first aid to save lives. Nonmedical emergencies often arise, and drivers should have a well-understood plan to protect the passenger from injury after the vehicle becomes disabled. Finally, the drivers must be able to recognize and avoid costly or dangerous transportation practices to keep agency costs and passenger injuries to a minimum.

Drivers are the agency's field force. They can be involved in identifying problems, managing vehicles, making suggestions, and promoting safety programs. Drivers are the individuals who create the situations in which liability is incurred. The safety and attitude of the passenger and the public are largely determined by drivers. It does not matter if drivers are agency employees driving agency vehicles, volunteers driving agency vehicles, staff members using their own vehicles, part-time employees using their own vehicles, volunteers, or contractors--the situation is virtually identical, and similar training is needed. Part-time employees or volunteers who live near the passengers or who are known by the passengers may know the special needs of the clients and may be able to avoid some of the problems that may occur when passengers are driven by a complete stranger.

DRIVER SELECTION

A good driver selection program is based on an exact description of the job, minimum criteria that a candidate must possess to perform the job, and the personal traits that make an excellent employee so that, when two applicants both meet minimum requirements, there will be a basis for selection.

Driver Tasks

The first step in driver selection is to identify those specific tasks that apply to the agency. Does the agency transport individuals who are blind, those who need door-through-door service while sitting in a wheelchair, or young children with discipline problems? Does the agency operate in rural areas, in severe cold weather, or on toll roads? The skills that are essential to the agency must be identified. The primary duty of the human-service-agency driver may be to assist program beneficiaries whether they need assistance with a wheelchair, help into the vehicle, help in fastening their safety belts, help in locating a drug store, help into the hospital, first aid, or help in scheduling their next appointment. The driving duties simply complement the primary responsibility.

Some systems have two individuals--an escort and a driver. Even in these systems, the driver performs the duties of an escort first and of a driver second. Many drivers have difficulty bridging the gap from professional driver to professional escort, since entirely different skills are required. Thus, the first step in an effective driver selection program is to define what the driver is expected to do.

Minimum Job Requirements

Once the agency has determined exactly what is expected of the driver, it should determine the minimum requirement for a person to be able to perform the job. The basic questions are the following:

1. Is the applicant physically, mentally, and emotionally able to perform the job?
2. Does the applicant identify with the mission of the agency and indicate a desire to work with the type of program beneficiaries that the agency transports?
3. Does the applicant exhibit proven driving skills and a safe driving record?
4. Does the evidence show that the applicant can be trained to the degree required?
5. Does the applicant show the degree of emotional maturity and self-control necessary for the job?

Minimum standards must be set for each of these areas.

The agency will need several items to screen drivers. An application form is used to identify physical problems, to determine prior driving experience, to obtain the driver's license number for the motor-vehicle check, to determine experience in volunteer and other human service activities, and to locate references that can be contacted to determine the driver's emotional maturity. A form for requesting motor-vehicle records is used to obtain a copy of the applicant's driving record. A physical examination should be performed by a licensed physician, who should be thoroughly familiar with the driver requirements. The examination should identify those physical conditions that could cause the driver to lose control of the vehicle or could lead to on-the-job injuries. Each agency will want to develop a checklist to make sure each area is covered.

There are several factors that affect the agency's driver selection strategy:

1. The agency should review the task analysis and should identify those applicants who possess the minimum skills and traits necessary to effectively transport the beneficiaries of the agency's program.
2. The agency should determine its ability to attract drivers. The agency should not be too quick to discount the fact that "psychic income" is the real attraction of the job, especially in the case of volunteers. Thus, the payment scale should emphasize both dollar income and psychic income. This emphasis may strongly influence the potential driver pool (especially volunteer and part-time employees) available to the agency.
3. The agency should consider which employees are most likely to be reliable. High absenteeism rates create a need for expensive backup employees. High turnover rates are a major concern of an insuror, since a high turnover rate generally indicates poor employee morale. High turnover generally leads to poor driver selection and training, since much time is spent screening and training drivers who work only a few days. Mature individuals who know the community, who desire to help their friends and the community, and who are not looking for a new, glamorous career are probably the most desirable driver candidates. Special consideration may be given to individuals who are not totally dependent on their income for support, such as retired military employees, off-duty firemen and policemen, farmers between crop seasons, housewives who are looking for employment while the children are in school, and students looking for employment while attending school.

4. The agency should consider the needs of its beneficiaries and determine the potential for ridesharing and timesharing. In many cases, program beneficiaries who can use standardized vehicles can be transported by existing providers such as other agencies, taxicabs, commuters driving their own vehicles to work, and intercity or transit buses. If the program beneficiaries need trips only during limited periods of the day, the agency should look toward timesharing (hiring part-time drivers and/or off-duty firemen and policemen or others who use their own vehicles) to provide service during that period.

5. The agency should categorize the program beneficiaries by the type of transportation needed. If passengers who require special assistance are consolidated in a single category, the remaining passengers can be transported with substantially less sophisticated equipment and driver training.

6. The agency should decide which services can be provided better by existing volunteer, contractor, and nonprofit agency programs that also supply transportation.

7. The agency should decide the degree to which it can employ the handicapped. This requires a special evaluation of the person's disability in light of the tasks outlined in the task analysis. Severely handicapped individuals may be excellent drivers of specially equipped vehicles if passengers do not need assistance. In other cases, handicapped individuals must be able to drive the vehicle, to assist passengers who have special needs, and to evacuate a vehicle in case of accident or emergency. No general rules should exclude the handicapped from applying for full- or part-time positions, but in no case should the agency use drivers who are subject to uncontrolled epilepsy, heart attacks, high blood pressure, uncontrollable diabetes, or other conditions that can cause sudden loss of vehicle control or that severely affect their ability to use judgment in operating the vehicle. Passenger safety is paramount.

8. The agency should not reject the use of low-income or minority employees, nor should it employ individuals simply because they belong to a disadvantaged group or are available at low or no cost to the agency (e.g., Comprehensive Employment and Training Act employees). Each disadvantaged employee should be screened just as any other employee is screened.

Categorizing Applicants

After considering all these factors, the manager can group applicants into three groups. The hirable individual will have the required physical, mental, and attitudinal characteristics needed for the job and will have mastered most or all of the skills and attitudes that are taught in the training program. Such an individual is a desirable employee but might cost the program more than the agency can afford to pay.

The trainable candidate possesses the requisite physical, mental, and attitudinal characteristics but requires training in skills needed to perform the transportation and passenger-assistance tasks conducted by the agency. A number of job skills, such as passenger assistance or first aid, can be taught. On the other hand, behavior traits, such as identification with the agency mission and adherence to good driving practices, are difficult to develop by training.

The potentially trainable candidate would be expected to have the requisite physical and mental abilities. However, this individual would differ from the first two types in that inappropriate social characteristics may have been learned along with habits leading to a poor driving record. Employing this type of candidate requires an extra step--diagnosing the cause of the poor driving record.

Unless the agency has a manager familiar with job-enrichment programs, the success of the potentially trainable driver may be quite low and use of such drivers could result in high insurance rates and accidental death and injury to clients. If the agency has a highly motivated manager who can help potentially trainable drivers experience something that helps them identify with the mission and purpose of the agency, the success of the potentially trainable driver may be improved substantially.

Legal Considerations

In an era of nondiscrimination and affirmative action programs, many program managers are concerned about their ability to screen out undesirable drivers if the applicant happens to belong to a group that traditionally has been discriminated against. The central question lies in the balance between meeting quotas and selecting safe drivers. Laws have been passed that prohibit discrimination on the basis of age, sex, or race. Although age and sex may be used as bona fide occupational qualifications, the courts have been reluctant to support either of these unless a strong argument can be mounted that all members of the excluded group could not perform the duties of the job safely and efficiently. This does not mean, however, that these individuals should not meet the same basic physical, driving, and mission-identification standards as other drivers.

DRIVER TRAINING

Once a qualified driver has been selected, the agency must instill professionalism and provide adequate training so that the driver fully understands what is expected and knows how to do it.

Professionalism

An important ingredient of the training process is the motivation of the employee. If driving the vehicle is simply a job and the driver is simply "putting in hours", then the training will probably not be effective. Human service professionalism consists of both the driver's motivation for helping the agency accomplish its mission and the driver's willingness to accept responsibility for preventing accidents. Candidate motivation is a key element in the driver selection process. This innate motivation must be cultivated and augmented by the manager of the human service agency to help the new drivers identify with the needs of the program's beneficiaries and recognize the importance of the agency's mission.

The second step, getting the driver to accept responsibility for accidents, is accomplished by continual training and an understanding by both the driver and the manager of the definition of an "avoidable" accident. The driver is professional when he or she fully realizes that an accident can cause physical injury or accidental death to a passenger and that the driver is the individual who determines not only whether the agency's mission is accomplished but also whether the mission is accomplished without injury to the clients. The importance of the driver's role is reinforced when the driver feels that the most professional training available is being given. With this training, the driver is expected, as a professional, to see that

transportation is provided safely, that passengers are assisted effectively, that vehicles are maintained adequately, and that all preventable accidents are avoided.

In-House Versus Professional Training

One of the fundamental questions that an agency must address is whether to provide training by using in-house personnel or using professional teachers in a formal program. There is a tendency for many agencies to try to conserve funds by using existing staff to train drivers. This approach is appealing from several points of view. It conceals the true cost of training, since the cost is in the form of reduced productivity, driver salaries, and administrative salaries instead of indirect training expense, and it makes the agency feel self-sufficient in that it feels that it is able to train drivers anytime it desires.

There are, however, several problems with in-house training. Training invariably takes a back seat to the primary responsibilities of the in-house personnel conducting the training. Responsibility for training is often delegated to someone who may intuitively do an effective job of driving but may not know why or how to teach someone else. Drivers do not sense the importance of training when it is done in a haphazard fashion. In-house training is often very informal, and there is no assurance that all areas will be covered, since a formal outline is seldom followed.

Ironically, professional training often offers many advantages, including lower cost and greater flexibility. It is often less expensive to hire professional trainers than to prepare existing employees to be teachers or trainers.

Agencies usually are not large enough to offer regular training sessions for new drivers unless they combine their efforts with those of other agencies. Thus, the cost of one-to-one in-house training becomes very expensive. (The salary of the trainer is usually greater than the cost of the professional training where the professional training is done in groups.)

Insurance companies are familiar with known training programs, but in-house efforts are of unknown quality, and thus there is uncertainty about the quality of the training in the mind of the underwriter.

Goldstein (5), in quoting a study by Lefkourtz, suggests that the best method would be to integrate off-site training, using simulation, with on-site, follow-up training by the manager when the employee returned to work. This follow-up focuses on interaction between the employee and the supervisor (and possibly other employees) to discuss the training experience and the ways in which the training specifically relates to the employee's job situation. This reinforces the off-site professional training, allows the driver to transfer the learning to the actual job situation, and bonds the driver to the employer with a sense of pride, professionalism, and identification with the mission of the agency. This dual approach would allow the best training for employees: professional, off-site, planned instruction followed by an on-the-job, follow-up phase. Each type of training would be doing what it can do best, and the agency would discover the most cost-effective way to train its employees.

ADMINISTERING A DRIVER SELECTION AND TRAINING PROGRAM

The manager of the human service agency has many transportation options. Although these different options allow the selection of cost-effective alternatives, they also require increased managerial attention, since a slightly different management approach must be used to administer each option.

Some of the options available to the manager of an agency that provides human service transportation include referrals to other providers, use of the agency's fleet, use of privately owned vehicles, and contracting. Other available transportation providers may include transit, taxicabs, intercity bus lines, airlines, other human service agencies, charitable organizations, volunteer programs, and consolidated transportation programs. The agency's fleet may be driven by full-time or part-time drivers, volunteers, or agency staff (whose primary duties are other than transportation). Privately owned vehicles used for transportation services may be owned by agency staff, part-time agency employees, volunteers, or friends, family, or neighbors of agency clients. Vans used by private-sector commuter vanpool programs may be loaned during noncommuting hours.

Several contracting options are available to the agency. Contracts may be signed for a specific trip, a specific program beneficiary, a specific route, an on-call service, part of the seats on a vehicle already making the trip (ridesharing), or all services needed by the agency. User-side subsidy programs, voucher programs, and block purchase of tickets are also options.

In considering each of these options, the agency manager must consider two questions: What special skills and training are actually needed to transport program beneficiaries safely? To what degree can the agency determine driver selection criteria and influence the drivers to be trained?

The first question is one that the agency can answer directly. The agency can determine both the typical needs of program beneficiaries and the special needs of individual clients. The answer to the second question is determined by the degree of influence that the agency has over the driver. If the agency desires to transport a program beneficiary by transit bus or airline, the agency will have little or no influence over the training of the driver. On the other hand, if the agency contracts with another organization (public, nonprofit, or contractor) to provide transportation in a specific geographic area for a six-month period of time, the manager will be able to specify the degree of training required. If the driver is a full- or part-time employee, the agency is not only expected to set standards but is also legally responsible for the correctness of the standards, especially if the agency owns the vehicle. Volunteers, family, friends, and neighbors of the passenger can also be trained, but this is done through motivation and appealing to the desire of the drivers to better serve the persons whom they have a commitment to serve. Thus, each management option requires a slightly different management approach. However, proper driver selection and training will be an important component in each case.

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