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Vanpooling

A Handbook to Help You Set Up a Program at Your Company

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Prepared by
Commuter Transportation Services, Inc.

Commuter Transportation Services, Inc.

Vanpooling

A Handbook to Help You Set Up a Program at Your Company

This handbook introduces vanpooling as a trip-reduction strategy. It provides program design and implementation procedures for commuters, employers and employee transportation coordinators.

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Commuter Transportation Services, Inc. is a private, non-profit organization founded in 1974. Its mission is to improve commuter mobility by providing services and information on ridesharing programs and other alternatives to driving alone.

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What is Vanpooling?

vanpool is a group of seven to 15 people who commute together on a regular basis in a van. One person usually drives and maintains the van, while riders split expenses. Companies sometimes own and operate vanpools, offering employees the chance to ride at a reduced rate as a "perk." Other vanpools are formed by individual commuters who want to find a better way to get to work.

Why Should We Offer a Vanpooling Program?

With clean-air regulations such as Regulation XV in the South Coast Air Basin and Rule 210 in Ventura County, many companies are looking for ways to reduce the number of trips their employees make to the workplace. A vanpool program can help you meet your trip-reduction goals. Just one van on the road takes as many as 14 cars *off* the road—the same results as up to seven carpools.

Vanpooling is also extremely popular among employees. In fact, 96 percent of people who have tried vanpooling say it is their preferred way to commute. You can bet that once you get a vanpool on the road, it's likely to stay up and running for many years.

How Much Will it Cost?

Cost can vary depending on the type of vanpooling program you choose to offer—whether you buy or lease vans, how much of the cost of vanpooling you plan to subsidize for employees and the size of vehicles you choose in your fleet, among other factors.

How to Use this Handbook

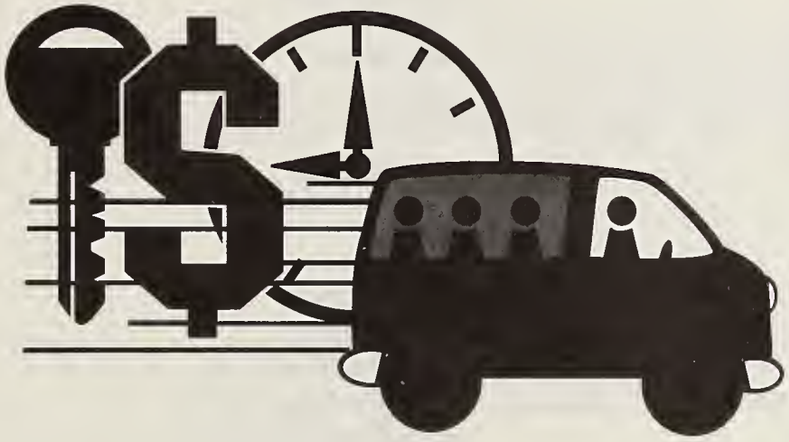
This handbook will give you the tools you need to start a vanpool program at your company. It is divided into four sections: vanpooling overview, program design, program management and a two-part appendix that contains sample forms and informative resource material. Throughout, you'll see references to "helpful resources" which identify sample forms, brochures, handbooks and other handy reference items that will help you with your vanpooling program.

For the sake of clarity, we have targeted this handbook toward employee transportation coordinators (ETCs) who are in charge of their company's vanpooling efforts and who choose to lease vanpool vehicles. However, the information can easily apply to anyone interested in forming a vanpool and to any type of vanpool program.

Section 1

About Vanpooling

- *What's In it for Your Employees*
- *What's In it for Your Company*



About Vanpooling

Since the 3-M Company in St. Paul, Minn. formed the first vanpool in 1973, vanpooling has changed the face of our nation's freeways—bringing together people who live and work near each other and taking hundreds of thousands of cars off the roads.

In Southern California alone, there are now roughly 2,000 vanpools on the road every day. This has a tremendous impact on traffic congestion in the region. If the people in these vans were to drive alone, their cars would stretch bumper-to-bumper for 55 miles, or enough to cover all four lanes of the 10 freeway for nearly 14 miles—from San Bernardino to Riverside and back.

Fewer cars on the roads means less pollution and fewer traffic tie-ups. There are also major benefits for employers and employees as well.

What's In it for Your Employees

Cutting Driving Stress

Studies show that people who vanpool arrive at work relaxed and ready to start the day—more so than their co-workers who drive alone.

Saving money

The average vanpooler in Southern California saves more than $1,500 a year on gas, car maintenance and wear and tear. Those who drive the van save even more, and may have use of the van on weekends.

Saving Time

In many areas, vanpools may use special carpool lanes, saving as much as 20 minutes each way. Even in areas without such lanes, most vanpoolers add only 10 minutes each way to their commute.

Qualifying for Tax Credits

If you ride in a non-employer sponsored vanpool vehicle, California state law allows a 40 percent credit—up to $480 per year—for actual out-of-pocket vanpooling expenses. In addition, employer-provided vanpool benefits are fully exempt under California tax law and exempt up to $60 per month under federal tax law.

What's In it for Your Company

Meeting Trip-Reduction Goals

Vanpools count as a strategy to help reduce trips to the workplace and can significantly increase your company's average vehicle ridership (AVR).

What's In it for Your Company (continued)

Enjoying Long-Term Success

Studies show that once vanpools are up and running, they're likely to stay on the road. That means that the effort you put into forming vanpools now will continue to pay off.

Recruiting Employees

People are willing to work farther from home if they know they don't have to drive every day, so your company can recruit workers from a wider geographic area.

Improving Employee Morale

Fact is, most employees view vanpooling as a company-offered benefit, much like health care or paid vacation—even if the employer is primarily helping manage the vanpooling program and is not picking up the entire cost.

Reducing Tardiness

Vanpools typically start and leave at the same time every day, and peer pressure keeps tardy people from holding up the vanpool.

Earning Tax Breaks

Employers who sponsor commuter vanpool programs can recapture some of their costs by claiming a credit for purchasing or leasing vanpool vehicles.

Section 2

Program Development

- *Your Role as an ETC*
- *Developing a Program that Suits Your Company*
- *Outline Goals and Objectives*
- *Decide What Type of Program You Want to Offer*
- *Gather Management Support*
- *Organize a Task Force*
- *Pool Your Resources*
- *Identifying Your Target Market*
- *Considering Financing Options*

Developing a Program that Suits Your Company

It's not difficult to plan a vanpool program, but you will need to dedicate some time to the project. In this section, we'll walk you through the decisions you need to make before you plunge into vanpooling.

Your Role as an ETC

Your company should have one person in charge of the entire vanpooling program. That person is called the "vanpool coordinator" and is usually the ETC. As the vanpool coordinator, you may be responsible for handling some—or all—of the details on your own. Even if the vanpool program is farmed out to an outside vendor, you still must be familiar with how things work so you can handle any problems that might arise.

Outline Goals and Objectives

By laying the groundwork, you ensure that once you get a vanpool program going, it will keep going. Here's how:

Decide what you hope to achieve with your vanpooling program. How much do you hope to increase AVR? Do you want to improve morale? Reduce tardiness? Put in writing your goals and objectives, which may be somewhat vague at this early stage of the planning process. Still, it will help you stay on track as you further formulate your vanpool plan.

Decide What Type of Program You Want to Offer

There are four ways you can choose to organize and fund a vanpool program. Which one is best for your company all boils down to whether you want to run the vanpool program, help run it, offer support—or just watch from the sidelines. If you opt to get more involved with the day-to-day dealings of the vanpool program, you'll invest more time and money. However, you'll also have more control over whether or not your vanpool program is a success. Here, we offer a breakdown of the "pros and cons" of the different types of vanpool programs:

Employer-Purchased Vans

Your company buys vans and administers the entire program, covering costs by collecting fares from riders.

This option offers the greatest control over program policies. Your biggest investment here is actually buying the vans. Overall costs are usually lower than those of any other type of vanpool program. The savings can be passed on to riders in lower fares—and ultimately higher ridership.

Employer-Leased Vans

Your company leases vans and administers either the entire program, some of the program or none of the program—depending on the terms of the lease.

Decide What Type of Program You Want to Offer (continued)

Employer-Leased Vans are the next step down on the involvement scale from owning your vehicles. Fares will be higher to cover finance charges and overhead expenses of the vendor.

Employee Monthly Leased Vans (sometimes called third-party vans)

An employee group leases a van from a vanpool vendor and pays fares directly to the vendor. You help by promoting the van and referring employees.

Employee Monthly Leased Vans are popular among employers because all financial and legal obligations are between the employees and the van vendor. In theory you aren't required to get involved. However, if you support the vanpool program through promotions, employee referrals and even fare subsidies if possible, it's more likely you'll see—and keep—vans on the road.

Owner-Operator Vans

An employee buys a van and administers all aspects of van operation—including maintenance and insurance—entirely on his or her own.

Owner-Operator Vans are the easiest for you to manage—and the hardest to get off the ground. An employee must be willing to assume full financial and legal liability, including securing insurance. You can help by referring riders to the driver's vanpool, but that's about the only control you have over this type of program. (Before you give referrals, however, make sure you have a copy of the driver's insurance and that the vanpool meets all legal and safety requirements.)

Gather Senior Management Support

Do your homework before you approach senior management. After all, if they are lukewarm on the idea of vanpooling, they're likely to show it by offering little support. This is where it pays to know what you hope to achieve with a vanpooling program. Most often, the goals are to meet clean-air regulations while breaking even on costs, although your company may have different objectives.

Organize a Task Force

What would motivate people to vanpool? What can individual departments offer to the process? How much are people willing to pay? This is the sort of input you can get from a task force, a special group that develops the policies and procedures that ensure your vanpool program is a perfect fit for your company. In addition, by organizing a task force, you have a ready group of people interested in vanpooling who will help you recruit riders once your vanpool program is underway.

In large companies, the vanpool coordinator usually chairs the task force and helps select its members (usually voluntary). It's helpful to have a good mix of people from varying departments. You may also want to include people from your legal or labor relations department.

Pool Your Resources (continued)

Consider Financing Options

It's still too early to come up with a detailed budget, but you can start gathering ballpark figures—especially in terms of how much money you'll need to start up your program. Costs to consider include:

- ***Capital costs:*** buying or leasing vans
- ***Administrative costs:*** personnel, office supplies, postage, membership and conference fees, printing and advertising, etc. (if applicable)
- ***Operating costs:*** vehicle maintenance, insurance, gas, oil and back-up vehicles

Remember that your company does not need to bear the burden of all these costs. Usually, you can get help from the following:

- ***Riders***—regularly scheduled riders help pay for vanpooling through monthly fees.
- ***Subsidy and grant programs***—you may qualify for state or federal grants that help defray the costs of starting and running a vanpool program, from subsidizing the cost of purchasing vans to helping pay for "empty" seats.
- ***Tax breaks***—California tax law allows tax credits to employers who lease or purchase vans. Specifically, employers with 200 or more employees get a 20 percent tax credit if they purchase, 15 percent if they lease. Smaller employers get a 30 percent tax credit, regardless of whether they purchase or lease.

  Federal tax law does not specifically mention business deductions for the costs employers incur when sponsoring rideshare programs. It is a common practice, however, for employers to claim certain rideshare costs as business deductions.

HELPFUL RESOURCES: Vanpooling Fact Sheet, Appendix B, pp. 49-50

Organize a Task Force (continued)

In smaller companies, the task force consists of two or three people who meet to help you with planning.

Pool Your Resources

Vanpooling isn't for everyone—or for every company. You must first determine if you have enough people who want to vanpool and, if so, if they meet the special criteria that makes vanpooling worthwhile.

Identifying Your Target Market

Use a density map and master list to find employees who live near each other—referred to as "clusters" of employees. These are your potential vanpoolers. (CTS can provide your company with a customized density map that will show locations of all employees to help you decide what method of commuting works best for them.) Following are guidelines for what makes up good vanpool route:

- ***Distance***—employees live at least 15 miles from the work site. Your odds of forming a vanpool are even better if employees live 20 miles or more from work and commute at least a half-hour each way.
- ***Number of Employees per Cluster***—15 to 30 people for a 12 or 15 passenger vanpool. (You need the extra people since, because of varying attitudes, lifestyles and schedules, not everyone who *can* vanpool will choose to.)
- ***Commute Routes***—clusters along the vanpool route that are composed of smaller groups picked up along the way to work (usually no more than three stops each way).
- ***Work Schedules***—people must be willing to start and end work at the same time each day.
- ***Park & Ride Potential***—most vanpoolers meet at Park & Ride lots near their homes.
- ***Parking***—employees that must pay for parking enjoy the fact that vanpooling allows them to split that bill 12 ways (depending on the number of riders in the vanpool). In fact, usually parking is free and is located nearer the building than other parking.

In addition to finding potential vanpoolers by using a density map, you can also survey employees. This gives you the added benefit of learning what their hours are and whether, in fact, they are interested in the idea of vanpooling.

Types of Vanpool Programs

Employer Purchased Vans	*Employer Leased Vans*	*Employee Monthly Leased Vans*	*Owner-Operator Vans*
Highest level of control over program	Some control over program	Little control over program	No control over program
Large commitment implied by up-front purchase of vans	Can arrange terms of lease, i.e.. month to month or long-term	No financial obligation; individual employees usually have only a month-to-month financial commitment	No financial obligation; owner-operator incurs all costs
Employer administers entire program	Employer administers some or none of program, depending on terms of lease	Drivers administer the program, under terms set by vendor; ideally, ETC also participates in operation	Owner-operator administers program
Employer provides maintenance	Vendor may provide maintenance	Vendor provides maintenance	Owner-operator provides maintenance
Employer secures insurance	Vendor may provide insurance	Vendor provides insurance	Owner-operator secures insurance
Employer provides back-up vehicles	Vendor may provide back-up vehicles	Vendor may provide back-up vehicles (carpool back-up)	Owner-operator provides back-up vehicles (carpool back-up)
Can offer low fares—which may attract more riders	Fares are higher due to overhead and administrative costs of the vendor	Fares are higher due to overhead and administrative costs of the vendor; fares fluctuate when seats are vacant	Fares are usually lower, depending on how the owner assesses seat value and size of vehicle
Employer can determine vehicle specifications and conversion options	Vehicle options limited to what is provided by vendor	Employer has limited or no choice in vehicle specification and conversion options	Employer has no choice in vehicle specifications, although owner-operator must comply with state regulations governing safety, etc.
Employer must work closely with program to ensure its success	Employer can work closely with program to ensure its success	More difficult to get vans "on the road" because program depends on big commitment from employee group	Individual employee hesitant to take on responsibility of program
Employer can set consistent fares month to month	Employer can usually set consistent fares from month to month	Fares may vary from month to month depending on the number of riders	Fares will typically vary from month to month, depending on the number of riders

Section 3

Program Management

- *Buying or Leasing a Vanpool Van*
- *10-Step Plan to Get Vans On the Road*
- *Put it in Writing*
- *Recruit Riders & Drivers*
- *Sign Riders*
- *Fill Empty Seats*
- *Select a Driver and Alternate Driver*
- *Establish Fares*
- *Secure Insurance Coverage*
- *Secure the Vans*
- *Keep Regular Records*
- *Trouble-Shoot*
- *Where You Can Go for Help*

Managing Your Program

This section offers a basic overview of how to buy or lease vans for a vanpool program. It does not, however, delve deeply into the specifics; what is available changes nearly on a daily basis, and you'll need to do the legwork on your own to get the latest options at the current price. Once you've decided on the types of vans you want, this section outlines a step-by-step plan to getting those vans on the road.

Buying or Leasing a Vanpool Van

Before you put out the word about your vanpool program, it helps to have the vans if not in-house, at least on order. That way, once people sign on, they can get rolling right away—*before* they have a chance to change their minds.

If you choose to buy, your purchasing department will most likely take on the task. While they may know a great deal about how to buy vehicles, however, they probably don't know much about vanpools. It is your job to help them make sure vanpool vehicles meet current specifications. You want to avoid a situation like the company that purchased a fleet of vans, only to find that they were too tall to fit in the parking structure. As a rule, purchasing a vehicle takes roughly six months from start to finish.

If you choose to lease, the vendor will usually be up to speed on the latest requirements. Still, it pays to be informed. Only you know the needs of your company and employees. It's easy to get talked into more—or fewer—features than you need.

Consider not only those specifications required by state and federal law, but also those that make vanpooling more comfortable and appealing, and therefore easier to sell to employees.

Some choices include:

Types of vanpool vans
- mini—seats up to seven
- standard—seats up to nine
- maxi—seats up to 15 (seating designs vary)

Features
- engine size
- anti-lock brakes
- airbags
- cloth or vinyl seats
- etc.

Accessories
- cruise control
- tilt steering
- power mirrors
- type of radio/stereo cassette
- intermittent wipers
- power door locks and windows
- etc.

Buying or Leasing a Vanpool Van (continued)

The most popular type of van is a 12-passenger van with individual reclining seats. Most companies choose this type because comfort is a big selling point to employees. If price is your top priority, however, you'll want to opt for bench seats and fewer luxuries—not the best, but certainly better than no vanpool at all (although the cost for luxury vans translates to just pennies a day to employees). Just as if you were buying or leasing a vehicle for yourself, you'll need to weigh the needs and requirements of your vanpool program against the dollars you have to spend.

HELPFUL RESOURCES: Vanpool & Buspool Vehicle Requirements Fact Sheet, Appendix B, p. 51 • State Vanpooling Laws Fact Sheet, Appendix B, p. 52 • Available from CTS: Van Vendors List, Custom Van Conversion Vendors List, call the Commuter Services Helpline at (213) 365-6993.

10-Step Plan to Get Vans On the Road

The plan described here is fairly formal, so feel free to adapt it to better suit the needs and style of your company. Be sure not to skip any steps entirely, however. Even if you're starting out with just one vanpool, you'll need to build a solid foundation so that you can easily add vanpools if you choose to at a later date.

1) Put it in Writing

Prepare a written policies and procedures manual which, in essence, answers every question that an employee could possibly ask about your company's vanpool program. Make sure that your policies are not only applicable now, but will work even as your program expands. (For example, if you're offering a $50 monthly bonus for vanpoolers, can you afford to do so if your fleet grows from one vanpool to 20?) There are literally hundreds of questions you must address in your manual. Some examples:

- Will you guarantee a ride home in case of emergency or unexpected overtime
- What is the length of commitment a rider must make to the vanpool
- What happens when the driver or a rider is sick or on vacation
- Who finds new riders
- What are the driver's basic responsibilities
- How much your company will foot of the vanpooling bill
- Who an employee should contact if he or she is interested in starting up a vanpool
- What incentives are available to vanpoolers

1) Put it in Writing (continued)

To prepare your manual, it may help to go through this handbook page by page and anticipate any situations that may arise, then determine what your company's policy will be. Some companies list all their policies and procedures on a two-sided laminated sheet that is kept in the vanpool vehicle at all times; others prepare booklets that include forms, copies of flyers and any other pertinent information. Of course, if your company's vanpool policy is that any employee may start a vanpool but you won't offer assistance, your policies and procedures manual could fit on a post-it note—and that's okay, just as long as it's in writing.

2) Recruit Riders & Drivers

Look for creative ways to drum up interest in your vanpool program so you'll have a ready list of riders. Use flyers, posters, paycheck stuffers and articles or ads in the employee newsletter. Be specific. Describe the route or general pick-up points for each proposed vanpool. A simple announcement might look something like this:

> "A vanpool is forming in the (*name of area*) for people who work the (*7 a.m. to 3 p.m.*) work shift. If you are interested, contact your company's employee transportation coordinator, (*your name*), at (*phone #*) for more information."

You may also want to distribute *Vanpool Interest* forms (in the appendix of this handbook) which poll employees to see if there is any initial interest in the idea of vanpooling.

When employees stop by your office to sign up, use this opportunity to enlist their assistance to recruit other riders. Once you find you're close to forming a vanpool, consult your density map and directly contact others in the area to persuade them to fill any empty seats. Most vanpools do take a while to pull together, so be sure to keep in touch with those who have signed on to keep them interested and up-to-date.

Another way to sign up riders is to host a vanpool formation meeting. This works best for vanpooling coordinators at large companies who would be overwhelmed trying to contact potential riders on a one-by-one basis. At such a meeting, you can answer people's questions about vanpooling, describe routes and get right down to the business of signing up riders.

The Vanpool Formation Meeting

Hold a vanpool formation meeting for each vanpool you hope to get on the road, and invite only those who would qualify to ride on the vanpool (people who live near each other or along a prescribed route and who now work or *could* work similar hours).

2) Recruit Riders & Drivers (continued)

Your goal at this meeting is to get commitments from 20 percent more people than you actually have vanpool seats for. That way, you have plenty of people to serve as back-up riders if any of the regular riders drop out. You'll also want to recruit drivers and alternate drivers (which will be discussed later in this section).

Begin your meeting by letting people know what vanpooling is all about. After all, although you've become an expert by now, most people are unfamiliar with the benefits of ridesharing by van. (You may want use the definition and benefits list in the first section of this handbook as a reference.)

Some of the ground you should cover during the introductory portion of your vanpool formation meeting:

- Describe the route that your vanpool will cover.
- Estimate the mileage and monthly fares. (Fares normally range from $60 to $120, excluding fuel costs.)
- Describe the vans, such as the vehicle type and make, number of seats, equipment and options. If the vans have "extras" such as reclining seats and overhead lights, use this as a selling point.
- Discuss what is expected of riders (including such aspects as insurance, maintenance, etc., if relevant). At this point, it may be handy to distribute your company's policies and procedures statement or the *Vanpool Passenger Agreement* included in the appendix of this handbook which outlines rider obligations.
- Discuss the role of the driver and alternate driver and determine if there are any volunteers. Drivers typically handle routine van maintenance and minor repair and collect riders' fares. In exchange, they ride for free and often have use of the van in the evening and on weekends. Alternate drivers fill in when drivers are unable to (whether due to illness, vacation or other reasons) and receive a prorated share of the driver's free mileage or other compensation the group may agree on. Also review other aspects of the driver's and alternate driver's roles, such as qualifications, approval process and training.

  Another option to discuss is the role of a van coordinator or administrator as an alternate. This person handles the paperwork and collects fares but either shares driving duties with other passengers or does not drive at all. Van coordinators or administrators (as well as alternate drivers) could ride at a discount, depending on how much responsibility they take on.

2) Recruit Riders & Drivers (continued)

You may also want to distribute the *Driver and Alternate Driver Agreement* form and *Van Driver Application* included in the appendix of this handbook which outline driver responsibilities (or consult with your vanpool vendor for a copy of their agreement).

- Include a question and answer period. Although most people view vanpooling as a benefit, you should be prepared to encounter resistance. After all, some people resist change of any sort—even for the better!

At this point, take a count of how many people remain interested. If there are enough to start up a vanpool, roll up your sleeves and start working out the details on the spot—while people are still excited and eager to get going. With your leadership, vanpoolers can:

- Set a target date to get their vanpool rolling.
- Determine a schedule for arrival and departure times, based on riders' work schedules.
- Design the route the vanpool will travel to and from work, including pick-up and drop-off points. (Most vanpools select a common meeting point such as a conveniently located Park & Ride lot. Others prefer two or three stops along the early segment of the route to work.)
- Decide where employees will meet for the ride home.
- Establish back-up carpool arrangements in case of an emergency or other problems.
- Agree to simple ground rules to avoid any conflicts or misunderstandings down the road (how long the van will wait for late riders, as well as policies on smoking, radio, unscheduled stops for errands, etc.)
- Select a driver, an alternate driver and, if applicable, a vanpool administrator. (If there are no volunteers, you can still recruit riders, but you won't have a vanpool until you have someone to drive it.)
- Sign riders (see pg. 18 for details).

HELPFUL RESOURCES: Vanpool Etiquette Flyer, Appendix B, p. 53 • Park & Ride and Other Ridesharing Locations Handbook, CTS Collateral Order Form Item # HB0219 • Sample Vanpool Formation Meeting Agenda, Appendix A, p. 29

3) Sign Riders

It's important that potential riders make a commitment to the vanpool in writing since you will be deciding whether to go ahead with a vanpooling program based on their interest. Provide a written agreement and make sure no one vanpools without signing it. A typical agreement outlines riders' obligations, safety issues and terms and conditions of the vanpooling arrangement. Also, riders should pay the first month"s fare in advance.

HELPFUL RESOURCE: Sample Vanpool Passenger Agreement Form, Appendix A, p. 30

4) Fill Empty Seats

Needing to recruit riders for empty seats is an experience common to anyone who has tried to get a vanpool program underway. You can start a vanpool without every seat filled, but that will drive the costs up. Many people are unwilling to vanpool if they know they're paying more than they have to.

Try urging people at the vanpool formation meeting to help recruit new riders. You may also want to look into special programs, such as the Vanpool Quick-Start program in San Bernardino and Riverside Counties, that subsidize the cost of empty seats for a period of time to help get vanpools going.

If you still have seats to fill, try these tips to market your vanpool and sign up riders:

- Place an ad in the classifieds
- Speak with ETCs at neighboring companies to see if you can "pool" employees to fill or start a vanpool
- Offer special incentives (as simple as a magazine subscription or as spectacular as paid days off)
- Invite a vanpool vendor or a representative from CTS to your company to give employees a look at a vehicle they could be riding in

If after repeated attempts you can't recruit enough riders to make vanpooling an affordable option, you may need to temporarily shelve your vanpool program and try again in a few months. You may also want to review your density map to see if there are possible vanpool routes you may have overlooked.

5) Select a Driver and Alternate Driver

The driver is the critical link between the vanpool and your company. He or she acts as the vanpool "leader" and drives on a regular basis, collects fares, keeps records, helps recruit riders, keeps the van clean and notifies you of any maintenance problems (although some drivers simply drive, and leave other duties to the vanpool coordinator). In exchange for these services, the driver rides free and is often entitled to use the van on evenings and weekends, depending on company policy.

Driver Criteria

California law requires a vanpool driver or alternate driver to have a class 3 driver's license and to submit to a sworn statement that he or she has not been convicted of reckless driving, drunk driving or a hit and run offense in the last five years. In addition, a vanpool driver or alternate driver must undergo a medical exam to identify any underlying medical conditions that may affect driving ability and, if there are no problems, obtain an approval certificate from the doctor. (Vanpool drivers and alternate drivers can now be reimbursed up to $30 through the state for the medical exam; call your CTS account executive for details.)

Your company may also require that the vanpool driver

- Live near vanpool riders
- Be an employee at your company
- Have his or her supervisor's recommendation
- Have an excellent work attendance record
- Successfully complete an in-house or other driver safety course

Driver Duties

Some companies prefer to supervise paperwork and van maintenance; others like to leave it entirely in the hands of the driver. Following are tasks generally handled by the vanpool driver or van coordinator/administrator:

- Work as a team leader to determine pick-up spots and times and vanpool etiquette
- Deliver riders to work and home on time
- Collect and account for fares on a regular monthly basis
- Find one or two alternate drivers to fill in when he or she is unable to drive
- Help find a replacement rider when one drops out

5) Select a Driver and Alternate Driver (continued)

- Enforce the law requiring riders to wear safety belts
- Fuel up the van during non-commute hours
- Conduct a daily vehicle check
- Keep the vehicle clean
- Arrange for minor repairs such as replacing wiper blades, changing oil, etc.
- Schedule and deliver the van to the company-appointed site for major work such as tune-ups or engine repair. (California law requires all vans that are part of a vanpool to have a 6,000 mile safety inspection.)
- Keep mileage logs and passenger records
- Maintain records of company- and state-required maintenance
- Send monthly payments to vendor or company

Alternate Driver(s) Selection, Benefits and Obligations

When the alternate driver steps in to fulfill driving duties, he or she takes on all the responsibilities of the driver outlined above. In exchange, the alternate driver receives a prorated share of the driver's free mileage, or other compensation that the group may agree upon. Any agreement should be in writing. (Some vanpools sign on more than the recommended two alternate drivers—just to be safe).

HELPFUL RESOURCES: Sample Driver and Alternate Driver Eligibility form• Sample Van Driver Application • Sample Driver and Alternate Agreement form, Appendix A, pp. 31-34

Training Drivers

Some companies require that drivers take a course in safety and to help them brush up on their driving skills, although this is not mandatory. Others simply offer a short lesson on how to collect fares and handle the vanpool paperwork.

6) Establish Fares

Riders pay a monthly fare in advance to reserve their seats on a van. They pay even for the days they do not vanpool, whether this is due to illness, business trips, vacations or because they choose to drive to work on their own. Riders may, however, sublease their seats to recoup costs and ensure that the van is operating at full capacity at all times.

6) Establish Fares (continued)

Normally, the driver issues each rider an invoice for the upcoming monthly fare. The driver collects payment and issues a receipt. (To avoid overburdening the driver with paperwork, only those riders paying in cash should be issued receipts; otherwise, their canceled checks can serve as their receipts.) After collecting fares, the driver forwards all money to the employer or vanpooling vendor (less the cost of gasoline).

To make collecting fares easier, many companies deduct fares from employees' paychecks, placing the funds in the vanpool's account to be drawn from as needed.

Fare Structure

While fares are paid in advance, if a rider drops out, it will affect fares for the following month and thereafter. (Riders must give 30 days notice before quitting a vanpool, which should be detailed in the rider's agreement form.) If at any point there are fewer riders than the van had when it initially set fares, it is possible that the driver will lose his or her free privileges, the fare will increase or the vanpool will go under.

To make sure that the vanpool is operating on a break-even basis, you must help the driver keep an eye on costs for operating the van. Were your estimates of gas costs on-target? Were there any new vanpools added to the fleet that could affect the fixed costs? Have any other costs changed? Riders should be notified 30 days in advance of a fare increase or decrease.

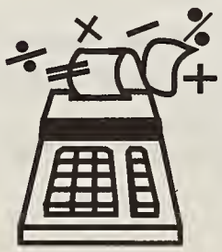
How Much Should You Charge?

In a nutshell, the way to determine fares is to add up all the costs involved with the program, then divide by the number of riders (not including the driver, who rides free).

Costs include both those that are fixed (vehicle purchase price less depreciation, insurance, registration, and license fees or your monthly leasing cost) as well as operating costs (maintenance and fuel).

In order to attract riders, many companies subsidize a portion of employee fares. How much you choose to subsidize, if any, will be based on what your company can afford, what employees are willing to pay, what you hope to gain in terms of AVR as well as how much you'll save on parking and other drive-alone expenses.

Calculating Costs



Following is a sample formula that will help you determine initial fares for vanpools. These fares will most likely need to be adjusted later to accurately reflect real operating costs (which is the purpose of *Daily Logs* completed by drivers). With month-to-month and some other lease arrangements, fares will be predetermined by the van vendor.

6) Establish Fares (continued)

To determine fixed costs:

	per month
Vehicle payment	$550.00
Insurance	300.00
License fee ($150/year divided by 12 months)	13.50
Maintenance - tires/oil change ($1,200 year/divided by 12 months)	100.00
Total fixed costs per month	**$963.50**

To determine operating costs:

Daily round trip miles	60
Gas costs (at .15 per mile)*	x .15
Number of working days/month	x 21
Total operating costs per month	**$189**

To determine fares:

Total fixed costs per month	$963.50
Total operating costs per month	$189.00
Total costs per month	**$1152.50**
Divided by number of riders (minus driver)	÷11
Suggested monthly fare per rider	**$104.77**

** Source: Based on 1992 estimates from the Automobile Club of America*

Although it's much cheaper to vanpool than to drive alone, people often are daunted by the cost of vanpooling because they simply aren't aware of how much they're paying for gas, car maintenance and wear and tear. Fact is, the average vanpooler in Southern California saves $1,500 a year. When you establish fees, it may help to provide employees with a comparison of vanpooling costs versus those of driving alone.

HELPFUL RESOURCES: Vanpooling Fact Sheet (Section: How Much Can I Save?), Appendix B, p. 49 • Sample Daily Log, Appendix A, p. 39 • Sample Vanpool Invoice/Receipt, Appendix A, p. 36

7) Secure Insurance Coverage

You must have adequate insurance for your vanpool. In California, employer liability is limited to employer-operated vanpools and does not extend to individual owner-operated and employee leased vanpools. They must provide their own insurance coverage. Van vendors typically provide insurance coverage for companies that lease vanpools. Otherwise, you will either need to self-insure or obtain coverage from an insurer specializing in vanpool risks. Be sure to leave enough time for this step—not every insurance provider covers vanpools.

Recommended minimum coverage amounts are:

Bodily injury: $500,000 to $1.5 million

Property damage: $50,000

Medical payments (per person): $5,000

Uninsured motorist: $50,000 to $100,000

Comprehensive: $250 deductible

Collision: $250 deductible

Your insurance agent will want to know the name of the legal owner of the van, where it will be stored and its costs, capacity and daily mileage. To help keep insurance costs down, make sure that the drivers and alternate drivers you select have good driving records.

If you have problems finding insurance for your vanpool, contact your CTS account executive for names of agents and insurance providers that are accepting vanpools for coverage. You also may be able to get help through the Association for Commuter Transportation.

8) Secure the Vans

Once you have a certified driver, at least 75 percent of the needed riders, and have completed all of the above steps, you should be ready to lease your van. Use a *Van Formation Checklist* (included in the appendix of this handbook) to make sure you have not overlooked anything. Ideally, you want a van as soon as you're ready to roll—delays allow riders to lose interest. When working with a van vendor, keeping the vendor up-to-date on your progress can help you avoid setbacks once you order the van. If you're purchasing vans, you'll need to closely coordinate when you'll need the vans with your purchasing department.

HELPFUL RESOURCE: Sample Van Formation Checklist , Appendix A, p. 37

9) Keep Regular Records

Of course, no vanpool arrangement is set in stone. By keeping thorough, accurate records, you can track such changes as new riders, increases in gas costs, etc., that affect whether or not a vanpool is breaking even on costs. While you will need to oversee record-keeping, in reality the vanpool driver maintains most forms. Records that must be maintained on a regular basis include:

- ***Passenger List:*** records the name, home address, and phone number of each van rider and driver; this list is updated monthly and used by the van driver to make alternate arrangements in the event of problems
- ***Daily Log:*** records commute miles, maintenance service, and riders carried
- ***Daily Safety Check:*** a list of safety checks—such as lights, tires and fuel level—that a driver should make every day
- ***Weekly/Monthly Safety Check or Vanpool Program Preventative Maintenance and Safety Checklist:*** lists of safety checks—such as vehicle fluids, brakes, lights, etc.—that a driver should make on a weekly or monthly basis, or take to an employer-authorized station to have performed
- ***Cancellation Notice:*** any departing rider should complete this form and turn it in to the driver 30 days prior to leaving the van; the driver must forward it to the vanpooling coordinator or vanpool vendor immediately
- ***Invoices:*** for collecting rider fares

HELPFUL RESOURCES: Sample Passenger List • Sample Daily Log • Sample Daily Safety Check • Sample Weekly/Monthly Safety Check • Sample Vanpool Program Preventative Maintenance and Safety Checklist • Sample Cancellation Notice, Appendix A, pp. 38-43

10) Trouble-Shoot

You'll need to commit a certain amount of time on a regular basis to make sure that your vanpool program is running smoothly; how *much* time is determined by the type of program that you've developed.

At the top of the list: always keep an ear open to the concerns of both drivers and riders. This will help you avert problems before they endanger the stability of the vanpool program.

You'll also need to continually help recruit new riders for vanpools if riders drop out. It's best to keep a ready waiting list if possible so that the transition can be made without it ever having to affect fares.

10) Trouble-Shoot (continued)

In rare instances, it may happen that a driver or alternate driver is not working out. The agreement between your company and a driver or alternate driver may be terminated by either party by giving a 30 day written notice. You may, however, terminate the agreement immediately if the driver does any of the following:

- Relocates from geographical area assigned
- Is negligent in the operation of any motor vehicle
- Transfers to a different work location
- Receives excessive moving violations under the motor vehicle laws of any state
- Abuses or fails to properly maintain the company's vehicle
- Does not arrive at or leave work on a punctual basis
- Fails to comply with the terms of the written driver and alternate driver operation agreement
- Terminates employment with the company
- Is absent from work for a prolonged period and/or is on temporary disability

Lastly, develop a procedure that vanpool drivers must follow in the event of an emergency breakdown. If the van is leased, the vendor will most likely provide emergency road service. Under no circumstances should the vanpool driver or riders attempt a curbside repair themselves—even if it is just a flat tire. Some common ground rules:

- ***Minor Accident***—if the vehicle is still mobile, instruct the driver to contact you as soon as he or she arrives at work. The driver should get the names of anyone involved in the accident, including witnesses, as well as exchange insurance information.
- ***Major Accident***—provide drivers with accident report forms and witness cards—cards that detail what information should be collected in the event of an accident. Require that these forms be kept in the van at all times.

HELPFUL RESOURCES: Sample Accident Report Form & Witness Card, Appendix A, p. 44

Rest assured, however, that a well-planned vanpool program is like a well-maintained car: it may need a bit of fixing now and then, but it's something you can always depend on.

Where You Can Go for Help

CTS offers additional materials as well as free half-day workshops that can help you with your vanpooling program. For more assistance, contact the commuter services department at CTS at (213) 365-6993. You may order items listed in this handbook from a collateral order form, available through your CTS account executive or by calling the CTS office nearest you.

Appendix A

Sample Forms

- *Vanpool Formation Meeting Agenda*
- *Vanpool Passenger Agreement Form*
- *Driver and Alternate Driver Eligibility Form*
- *Van Driver Application*
- *Driver and Alternate Driver Agreement Form*
- *Vanpool Costs Worksheet*
- *Vanpool Invoice/Receipt*
- *Van Formation Checklist*
- *Passenger List*
- *Daily Log*
- *Daily Safety Checklist*
- *Weekly/Monthly Safety Check*
- *Vanpool Preventative Maintenance and Safety Checklist*
- *Cancellation Notice*
- *Accident Report Form & Witness Card*
- *Route Information Form*

Sample Vanpool Formation Meeting Agenda

Vanpool originating in _____
Date _____

1. Definition of a vanpool, general statement of operation and overview of steps to start a vanpool.

2. Distribute and discuss vanpool formation subscription agreement.

3. Work hours to be served by vanpool from _____ AM/PM to _____ AM/PM

4. Estimated mileage and fare.

5. Start-up subscriber level.

6. Community pick-up points and route.

7. Pick-up/Drop-off arrangement at the work site.

8. Comfort and convenience arrangements; smoking, radio, wait policy, etc.

9. Decision vote.

Sample Vanpool Passenger Agreement Form

I, _____, want to participate in a vanpool offered through _____(Specify Company Name)_____ and agree to:

- Cooperate with the driver and other riders to define the pick-up points, times, waiting policies and other guidelines for creating an efficient and compatible vanpool.
- Be on time at my specified pick-up point.
- Pay the required passenger fare by the first of each month.
- Give advance notice to the vanpool driver of the times I know I will be absent. I will also contact the driver as soon as an unexpected illness or condition arises keeping me from riding.
- Notify the driver 30 days before permanently vacating my seat.
- Wear my seat belt.
- Refrain from smoking or drinking alcohol on the van.
- Comply with reasonable requests of the driver.

This agreement will commence when signed, and can be terminated 30 days after notice is given from either the passenger or driver.

Passenger's Signature	Date		
Passenger's Name	Home Phone	Work Phone	
Address	City	State	Zip
Vanpool Driver's Signature	Date		
Vanpool Driver's Name	Work Phone		

Sample Driver and Alternate Driver Eligibility Form

If you are interested in being a vanpool driver or alternate driver, please consider the following to see if you are eligible:

- You must be an employee of _____(Specify Company Name)_____
- You must have 10 passengers and two alternate drivers (depending on the size of your vanpool) who want to commit to the vanpool.
- You may not have received more than two moving violations under the vehicle laws of any state, or more than one criminal offense arising out of the operation of a motor vehicle within the last three years. You must provide the company with your driving record as issued from the DMV.
- You must obtain your supervisor's recommendation.
- You must have an excellent work attendance record.
- You must live in geographical proximity to potential riders.
- You must successfully complete any company-required driver's safety courses.
- You must take a complete medical exam and provide your company with a copy of the results.

OBLIGATIONS

Drivers are the critical link between the vanpool and your company. They act as the vanpool "leader". Therefore, you must anticipate problems and be ready to find solutions. This applies to problems with the vehicle as well as with the riders. Responsibilities to the van include:

- Fueling up the van during non-commute hours.
- Conducting a daily vehicle check.
- Keeping the vehicle clean, both inside and out – again during non-commute hours.
- Arranging and delivering van for minor repairs such as changing flat tires, replacing bad light bulbs, replacing wiper blades, checking and changing oil, etc.
- Scheduling and delivering the van to the company appointed site for major work such as tune-ups or engine repair. California law requires all vans in vanpools to have a 6,000 mile safety inspection. The driver is also responsible for ensuring the work is done in a timely manner.

Sample Driver and Alternate Driver Eligibility Form (continued)

- Keeping mileage logs and passenger records as dictated by company needs.

Responsibilities to the passengers require that you:

- Work as a team leader to determine pick-up spots and times, routes and vanpool etiquette.
- Be prompt and deliver passengers to work on time.
- Collect and account for fares on a consistent monthly schedule.
- Find an alternate driver to fill in when you are unable to drive.
- Find a replacement rider when one drops out.
- Enforce the law requiring passengers to wear safety belts.

Applicants will be screened by the company, and will be selected based upon eligibility.

Sample Van Driver Application (for company owned only)

Type of Application: ☐ Driver/Coordinator ☐ Back-up Driver

Date of Application _____

_____
Name

_____
Street Address

_____
City State Zip

_____
Home Phone Driver's License # & State

_____
Years with Company Work Schedule (reporting time/leaving time)

1. Have you had any accidents or moving violations during the past 3 years?_____

2. How much travel/overtime does your job require?_____

3. How many days of work did you miss due to sickness last year?____

4. Are you experienced in automobile repair? If so, to what extent?____

_____

5. What experience have you had in car/van/buspooling?_____

_____

6. What type of space can you provide for overnight van parking? (on or off street, garage, etc.)_____

7. Would you be willing to be a back-up driver? ☐ Yes ☐ No

8. Would you be willing to be a passenger? ☐ Yes ☐ No

9. Do you have current insurance on your personal vehicle?
☐ Yes ☐ No

Driver Record Release

The applicant authorizes (Leasor Company) to investigate and research driving records with the State of California, any other state and/or any other public or private agency generally used to maintain information pertinent thereto, and agrees to execute any other forms or documents necessary for such investigation.

_____
Driver Applicant's Signature Date

Interviewer's Comments

_____

_____

Sample Driver and Alternate Driver Agreement (for company owned vehicles)

I, _____, will fulfill my responsibilities as van driver for my vanpool by agreeing to:

- Provide the lessor with a DMV report of my driving record.
- Show proof of my California Driver's License.
- Have a complete medical examination and provide a copy of the results to the necessary parties.
- Make a daily check of the van according to the guidelines in the van safety checklist.
- Maintain the vehicle during off-commute times including checking the oil and water levels, filling it with gas, keeping it clean and any other minor services it may require.
- Arrange for major repairs or work by dropping off and picking up the vehicle as well as making sure the work is done in a timely manner. I will also get approval from the lessor for the cost of these repairs prior to delivering the vehicle to the garage.
- Maintain a list of passenger names, addresses and phone numbers, as well as dates travelled, dates absent, substitute riders, etc., as outlined in the vanpool passenger list form.
- Maintain a mileage log.
- Act as the vanpool team captain by arranging meetings for members to establish vanpool etiquette, pick-up points and times, waiting periods, how to cover absent riders, etc.
- Enforce the wearing of seat belts.
- Be punctual and pick up vanpool members at previously appointed spots to and from work.
- Collect and keep records of appropriate fares. Inform passengers of any changes in the fare. Enforce the schedule for payment.
- Prohibit the drinking of alcohol or smoking on the van.
- Refrain from using alcohol or drugs prior to or while driving the van during both commute and non-commute times.
- Report any accidents to the lessor involving bodily injury or property damage.
- Do not alter the appearance or contents of the vehicle unless previously approved by the lessor.

Sample Driver and Alternate Driver Agreement (continued)

I understand that by meeting these responsibilities, I have the right to use the van during non-commute times for personal use, and that I will be able to commute free of charge (provided maximum ridership is maintained).

I understand and agree that a breach of any of these points is grounds for termination. Further, the lessor reserves the right to terminate this agreement with 30 days notice at any time after the commencement of this contract. In addition, this agreement will terminate automatically if I lose my driver's license or if the lessor has reasonable grounds to do so.

I, as driver or alternate driver, am providing a service as a vanpool driver and shall have no responsibility or liability whatsoever regarding the vanpool other than what is set forth in this agreement.

This agreement shall be in effect when signed by both parties.

Driver

Name

Address

City State Zip

Home Phone Work Phone

Driver's Signature Date

Alternate Driver

Name

Address

City State Zip

Home Phone Work Phone

Alternate Driver's Signature Date

Sample Vanpool Invoice/Receipt

The amount due is payable to the Driver/Coordinator by the first (1st) of the month. Checks should be made payable to __(Specify Company Name)__.

Vanpool Number	Amount Due
From (Date)	To
Passenger's Name	Employee Number
Address	
Source Code	Phone
Driver/Coordinator	
Signature	Date

Sample Van Formation Checklist

This will aid you in the steps that you must follow before your group can receive the van.

____ 1. Selected the vanpool driver and back up drivers.

____ 2. Selected group is ready to participate. There are _____ passenger agreements signed.

____ 3. The route and times have been agreed upon.

____ 4. The miles on the vehicle will be _____
The payment for start up will be $_____

____ 5. The size of the vehicle we choose is a _____ passenger van with _____ seats.

____ 6. Medical exams for drivers/back up drivers are complete (each driver has a signed medical certificate).

____ 7. Driving records for drivers/back up drivers are obtained and approved for insurance purposes.

____ 8. Contact/driver/coordinator is aware of the duties of collecting fares/maintaining any records that are required for van.

____ 9. Fares have been collected and ready to submit to van vendor.

____ 10. Date for the pick up/delivery of van is confirmed. Contract is signed.

On date of delivery of the van all driver/back up driver information is due, along with the first month's van cost. On this day the contracts are also signed. Those who will be responsible should be present.

Sample Vanpool Passenger List

VAN # _____

Parking Space _____ Daily Commute Miles _____ Date ____

Name	Address	Work #	Home #

Driver Information

_____

Passenger Information*

1 _____

2 _____

3 _____

4 _____

5 _____

6 _____

7 _____

8 _____

9 _____

10 _____

11 _____

12 _____

Alternate Passengers

1 _____

2 _____

3 _____

4 _____

*Indicate Alternate Drivers by placing an asterisk (*) behind the passenger's name.

Sample Vanpool Daily Log

Beginning Odometer Reading _____ Calendar Month_____19_____

Date	Day of Week	End-of-Day Odometer Reading	Total Miles	Commute & Maintenance Miles	Personal Miles	Regular Riders														Occasional				
						1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19
1																								
2																								
3																								
4																								
5																								
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Total																								

Sample Daily Safety Check

CHECK:

- ☐ For worn tires.
- ☐ Fuel level.
- ☐ To see if lights are working.
- ☐ Operation of safety belts.
- ☐ Cleanliness of vehicle (making sure it is clear of hazardous materials or objects).
- ☐ The seats to ensure they are securely anchored.

Sample Weekly or Monthly Safety Checklist

Van #_____ **Date** _____

- Check oil, oil filter, air filter, gas filter and refuel.
- Check transmission fuel.
- Check wheels and brakes.
- Inspect all tires, inflate to recommended pressure.
- Clean battery terminals.
- Inspect entire exhaust system.
- Inspect steering mechanism, add fluid if necessary.
- Inspect all hoses, clamps and pressure check radiator.
- Inspect all belts, replace if defective or notify vendor.
- Inspect all lights (head, tail, clearance, stop and interior).
- Inspect all windows for operation and all locking devices.
- Check for broken windows or handles.
- Inspect wiper blades and motors.
- Check horns and other warning devices.
- Major/minor tune-up date: _____.
- Inspect for loose seats or defective seat belts.
- Clean windshield inside and out.

Note any problems:

_____

_____

_____

Driver's Signature _____

Caltrans Vanpool Program Preventive Maintenance And Safety Checklist

Coordinator: _____ Van Lic. #_____

Company Name:_____
(if applicable)

VANPOOL MAINTENANCE

This form fullfills the requirements outlined by AB 550 and as such must be kept in your van *AT ALL TIMES.* It is the Vanpool Coordinator's responsibility to see that these requirements are met. The Vanpool Driver may be required to produce this form to the California Highway Patrol as proof of this vehicle's proper maintenance.

SERVICE INTERVAL	ODOMETER	DATE	MECHANIC	PM Lube Oil & Filter	Brakes Front %	Brakes Rear %	Steering & Alignment	Lighting Systems	W/S Wiper & Washer	A/C & Heating System	Cooling Sys. Belts/Hoses	Exhaust & Emission Sys.	Battery & Charging Sys.	Tune Engine	Replace Fuel Filter	Tires Front % & Wheels	Tires Rear % & Wheels	REMARKS
6,000																		
12,000																		
18,000																		
24,000																		
30,000																		
36,000																		
42,000																		
48,000																		
54,000																		
60,000																		
66,000																		
72,000																		
78,000																		
84,000																		
90,000																		
96,000																		
102,000																		
108,000																		

Sample Cancellation Notice

Name:_____

Payroll No. (if applicable):_____

Driver Name:_____ Route No.: _____

The last day for riding the van will be:_____

Please cancel my vanpool service on that date.

Reason for cancelling the service:

_____

_____

I understand deductions will continue until 30 days after a cancellation notice is received, or until a vacancy is filled (if there is a company deduction service), whichever comes first.

_____

Date Signature

Sample Accident Report Form

HAC FILE NO. _____

CODE _____

Insurance Co. _____

Policy No. _____ Policy Period _____ Date _____

Name of Insured	Policy Holder Name _____ Name of Driver _____ Dept. _____ Experience (Yrs) _____ Driver's License No. _____ Age _____ Phone No. _____ Address of Driver _____
Insured Car	Make of Auto _____ Year _____ Body Type _____ Identification No. _____ License No. _____ HAC Fleet No. _____ Name of Owner or Leasing Co. _____ Street Address _____ City _____ State _____ Zip _____
Damage to Insured Car	(Have no repairs made without consent of company) State nature and extent of damage to insured's car and give estimated cost of repairing. _____ _____ _____ Where and when can car be examined? _____
Time and Place	Date and Hour of Accident. On the _____ Day of _____ 19 _____ at _____ AM or PM Where did it occur? _____ City or Town _____ State _____
Other Car or Other Property Damaged	License No. _____ Make of Car _____ Body Type _____ Name of Owner _____ Address _____ Name of Driver _____ Address _____ License _____ Phone No. _____ Parts Damaged _____ Name of Insurance Co. and Policy No. _____ Where can it be examined? _____ When? _____
Injured Persons	Name _____ Approx. Age _____ Full Address _____ Nature of Injury _____ To what hospital (or home) taken? _____ Name _____ Approx. Age _____ Full Address _____ Nature of Injury _____ To what hospital (or home) taken? _____
Theft	Have authorities been notified? _____ Where and when? _____ Description of Parts Stolen _____ _____ _____

Sample Accident Report Form (continued)

Full Details of Accident

On what street or road were you driving? _____ Direction _____ Speed _____

Street or road other auto was driving on? _____ Direction _____ Speed _____

Were your lights on? ☐ Yes ☐ No ☐ Bright ☐ Dim Were other auto's lights on? ☐ Yes ☐ No ☐ Bright ☐ Dim

What traffic controls? _____ For Whom? _____ Speed Limit _____

Did either driver give signal of any kind? ☐ Yes ☐ No If, Yes, Who? _____

If intersection, who entered first? _____ Who had right of way? _____

Which driver violated traffic ordinance? _____ Charge _____ Did police investigate first? ☐ Yes ☐ No

Police Address? _____

State fully how it occurred. _____

_____

_____

_____

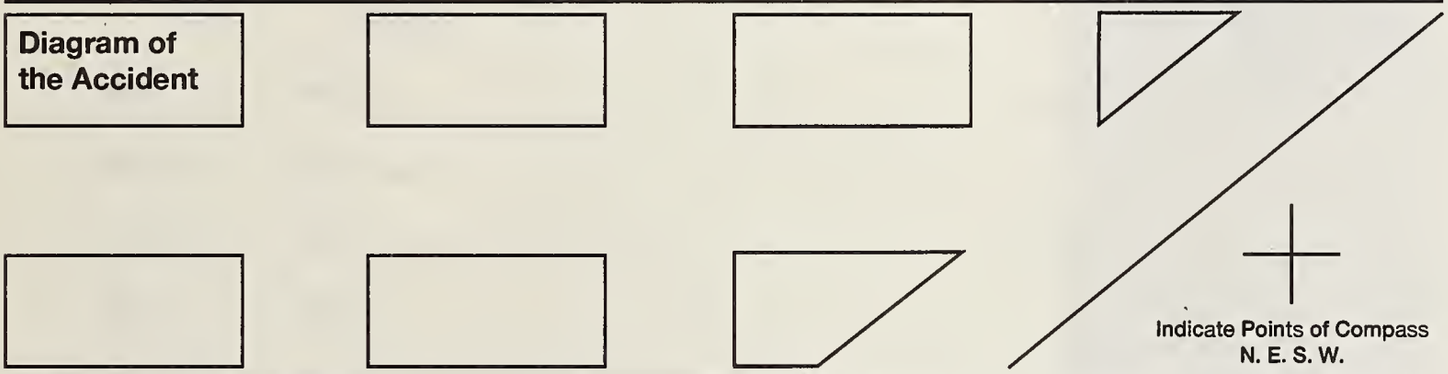
_____

_____

I hereby certify that the foregoing is true to the best of my knowledge. _____

Signature of insured driver. _____

Diagram of the Accident



Occupants Insured Car

Name _____ Address _____ Phone _____

Name _____ Address _____ Phone _____

Name _____ Address _____ Phone _____

Name _____ Address _____ Phone _____

Occupants in Other Car

Name _____ Address _____ Phone _____

Name _____ Address _____ Phone _____

Name _____ Address _____ Phone _____

Name _____ Address _____ Phone _____

Other Eye-Witnesses

Name _____ Address _____ Phone _____

Name _____ Address _____ Phone _____

Name _____ Address _____ Phone _____

Name _____ Address _____ Phone _____

Route Information Form

Company Name _____

Referrals Yes No _____

Driver (Please Print Full Name) _____ Phone # _____

Contact if Other than Driver _____ Phone # _____

Address of Driver or Contact _____

City _____ Zip _____

Alternate Driver Information

Name _____ Phone # _____

Name _____ Phone # _____

Van Number _____

3rd Party ☐ Co. Leased ☐

Co. Owned ☐ Owner Oper. ☐

Seating Capacity _____

Work Hours _____ AM to _____ PM

Origin _____

Destination _____

Pick-Up Locations/Home End (Cross Streets/City)	Depart	Arrive
1. _____	_____AM	_____PM
2. _____	_____AM	_____PM
3. _____	_____AM	_____PM
4. _____	_____AM	_____PM
5. _____	_____AM	_____PM

Drop-Off Locations/Work End (Address or Cross Streets)	Depart	Arrive
1. _____	_____AM	_____PM
2. _____	_____AM	_____PM
3. _____	_____AM	_____PM
4. _____	_____AM	_____PM
5. _____	_____AM	_____PM

New _____ Change _____ Date Activated _____

In House Use Only By _____

Appendix B

Resource Material

- *Vanpooling Fact Sheet*
- *Vanpool & Buspool Vehicle Requirements Fact Sheet*
- *State Vanpooling Laws Fact Sheet*
- *Vanpool Etiquette Flyer*

Vanpooling Fact Sheet

Commuter Transportation Services, Inc.

Vanpooling

What is Vanpooling?

vanpool is a group of seven to 15 people who commute together on a regular basis in a van. One person usually drives and maintains the van, while the riders split expenses. Companies sometimes own and operate vanpools, offering employees the chance to ride at a reduced rate as a "perk." Other vanpools are formed by individual commuters who just want to find a better way to get to work.

Why Should I Vanpool?

Vanpooling offers some definite advantages over driving alone, including:

- ***Saving money***
  The average vanpooler in Southern California saves more than $1,500 a year on gas, car maintenance and wear and tear. If you drive the van, you save even more, and may have use of the van on weekends.
- ***Cutting driving stress***
  Studies show that people who vanpool arrive at work relaxed and ready to start the day—more so than their co-workers who drive alone.
- ***Getting a break on your state income tax***
  You could qualify for a 40 percent credit, up to $480 per year, for actual out-of-pocket vanpooling expenses. (Your tax specialist has details.)
- ***Saving time***
  In many areas, vanpools may use special carpool lanes, saving as much as 20 minutes each way.
- ***Helping our environment***
  Fewer cars on the road means cleaner air and less congested freeways.

  The average car spews about a pound of pollution for each 29 miles it's driven. That means, if you give up your 100-mile round-trip commute to vanpool, you help cut about 3 pounds of pollution a day—or nearly 850 pounds a year!

> *"I'd highly recommend vanpooling to other people. It's convenient, it saves a lot of wear and tear on my car, and it saves gas. You don't have to worry about anything; you can just sit back and ride."*
>
> *— Ruth Schofield,*
> **UCLA vanpooler**

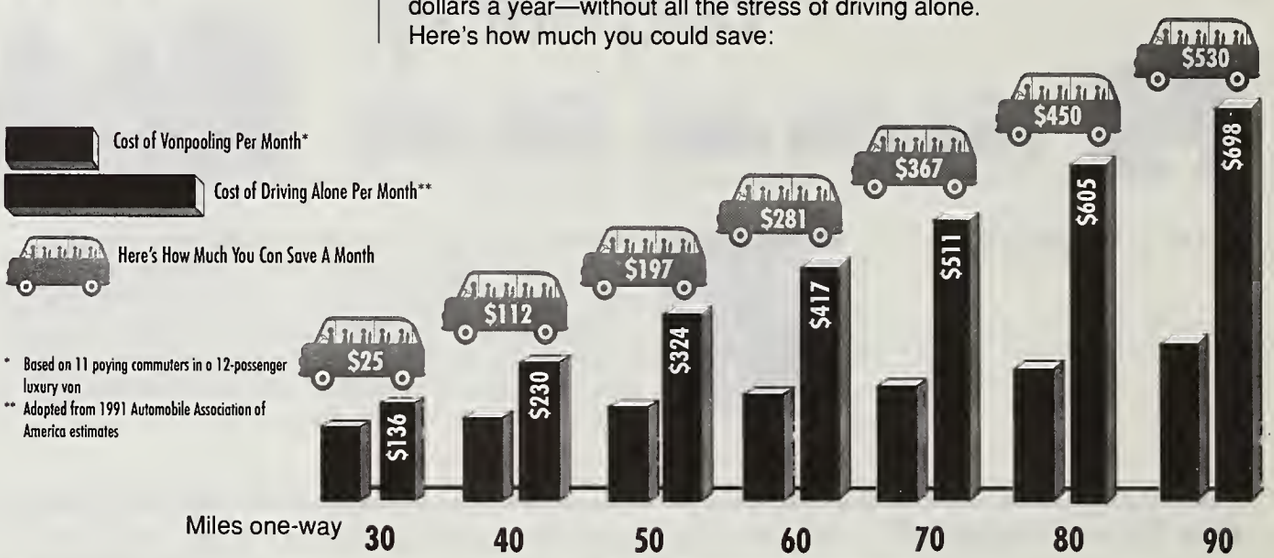
Is Vanpooling Right for Me?

People who commute more than 20 miles each way get the optimum cost and time savings from vanpooling. It's also right for you if you work fairly regular hours and are looking for a more routine arrangement than you could get from a carpool.

Vanpooling Fact Sheet page 2

How Much Money Will I Save?

By leaving your car at home and vanpooling to work instead, you could save up to thousands of dollars a year—without all the stress of driving alone. Here's how much you could save:



How Can I Join or Start a Vanpool?

Give us a call at Commuter Transportation Services, Inc. We'll match you up with a vanpool that services your area (maybe even one sponsored by your employer).

We can also help you—or your employer—get a vanpool on the road by helping you buy or lease a van, recruit riders and work out all the details. Just call one of the phone numbers below, or mail in the tear-off section. Do it today . . . and you could be vanpooling tomorrow!

Call Commuter Transportation Services, Inc. at

- *(213) 380-RIDE in Los Angeles*
- *(805) 255-RIDE in Northern Los Angeles*
- *(714) 684-RIDE in Riverside and San Bernardino*
- *(805) 656-RIDE in Ventura*

"We started our vanpool program 10 years ago, and it's still going strong. Our employees love it, because it saves them money and reduces the stress of commuting. We've actually had people come to work here because of our vanpool program."

Isabell Rodriguez
Transportation Coordinator,
Transamerica Life Companies

Please detach and mail this section to: *Commuter Transportation Services, Inc., Attention: Commuter Services Dept., 3550 Wilshire Blvd., Suite 300, Los Angeles, CA 90010*

Name: _____ Home phone: _____

Home address: _____ City: _____ Zip: _____

Employer name: _____

Work address: _____ City: _____ Zip: _____

Work phone: _____ Commute distance (one-way): _____

Must arrive at work by: _____ Usually leave work by: _____

Is there an employee transportation coordinator at your work site? _____

Do you wish to be a driver? _____ Alternate driver? _____ Passenger? _____

All information provided to CTS will be kept strictly confidential.

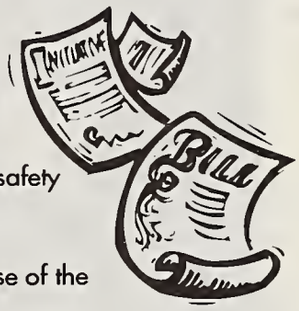
This report was prepared through grants from the United States Department of Transportation, Federal Highway Administration, with the cooperation of the State of California Department of Transportation.

VANPOOL & BUSPOOL
Vehicle Requirements

UNDER EXISTING CALIFORNIA LAW, PASSENGER STAGE CORPORATIONS (PRIVATE BUS LINES) ARE REGULATED BY THE PUBLIC UTILITIES COMMISSION (PUC). THIS ACT EXCLUDES SPECIFIED RIDESHARING VEHICLES FROM PUC REGULATIONS.

AS PER CHAPTER 122, 1988 CALIFORNIA STATE STATUTES (AB 1063)

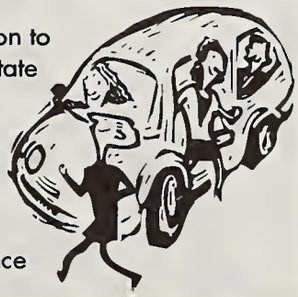
- This act amends Sections 226 and 5353 of the Public Utilities Code, relating to transportation.
- Buspool vehicles (having a seating capacity of more than 15 passengers) that are used to transport persons between home and work locations are exempt from regulations for private bus lines (called passenger stage corporation regulations) if:
  - (1) The driver files with the PUC evidence of liability insurance is secured in the same amount and manner as required for a private bus line.
  - (2) The vehicle undergoes and passes an annual safety inspection by the California Highway Patrol.



- This exemption does not apply if the primary purpose of the transportation service is for profit.
- A one-time filing fee of $75 is required at the time of the insurance filing to the PUC.

AS PER CHAPTER 262, 1987 CALIFORNIA STATE STATUTES (SB 981)

- This bill adds Section 22525 to the Vehicle Code, relating to vehicles.
- Permits local authorities by ordinance or resolution to authorize vanpool vehicles to utilize designated state highway bus stops.
- Requires that the ordinance or resolution be submitted to Caltrans for approval and would condition its effectiveness upon that approval. Caltrans would be required to review the ordinance or resolution within 45 days after receipt.



Commuter Transportation Services

For more information call the government relations department or your account executive at Commuter Transportation Services, Inc.

- **In Los Angeles**
  (213) 380-7750
- **In Northern Los Angeles**
  (805) 273-2425
- **In Riverside and San Bernardino**
  (714) 422-8088
- **In Ventura**
  (805) 656-2477

WHAT YOU SHOULD KNOW
About State Vanpool Laws

AS PER CHAPTER 46, 1982 CALIFORNIA STATE STATUTES (AB 550)

SINCE 1982, CALIFORNIA HAS HAD LAWS IN PLACE THAT DEFINE COMMUTER VANPOOL OPERATING AND SAFETY GUIDELINES. THE PURPOSE? TO ENSURE THAT VANPOOLING REMAINS A SAFE AND CONVENIENT OPTION FOR DAILY COMMUTERS.

- Commuter vanpool vehicles are exempt from nonprofit corporation filing fees (Government Code Sec. 12182.5) and "commercial vehicle" weight fees. (Vehicle Code Sec. 9107) Local agencies may not impose a tax upon or require a license for commuter vanpools. (Government Code Sec. 53075)

- A vanpool vehicle is defined as any vehicle other than a truck or tractor with a seating capacity of 11 to 15 adults that is used primarily for nonprofit ridesharing. (Vehicle Code Sec. 522, 668)

- Drivers of vanpool vehicles may operate with a Class 3 license, but must undergo the same medical examination (no more than two years prior) that is required for a Class 2 license. The driver is required to keep in the vehicle evidence that he or she has not been convicted of reckless driving, drunk driving or a hit-and-run in the last five years. (Vehicle Code Sec. 12804)

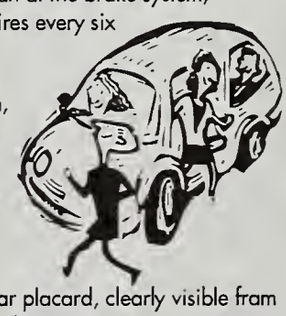
- **ACCORDING TO VEHICLE CODE SEC. 34509, A VANPOOL MUST:**

(1) Be equipped with an operable fire extinguisher (either a dry chemical or carbon dioxide type with an aggregate rating of at least 4-B:C) securely mounted and readily accessible.

(2) Be equipped with a first aid kit (like those in school buses) that is readily visible, accessible and plainly marked "First Aid Kit."

(3) Be regularly and systematically inspected, maintained and lubricated in accordance with manufacturer recommendations—or more often if necessary. The maintenance must include an in-depth inspection of the brake system, steering components, lighting system, wheels and tires every six months or 6,000 miles, whichever comes first.

Vanpool operators must document each inspection, including services performed, by whom, the date and the mileage at the time of inspection. Records must be kept in the vehicle for at least a year to be presented upon demand to any authorized representative of the California Highway Patrol.



(4) Display on the rear and sides of the vehicle a sign or placard, clearly visible from at least 50 feet, indicating its use as a vanpool vehicle.

Commuter Transportation Services

For more information call Commuter Transportation Services, Inc. at:

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- **In Ventura** (805) 656-2477

5/91

Vanpool Etiquette Flyer

Although too many rules can become burdensome and common sense is usually sufficient, the intent of setting up some practical ground rules is to avoid future misunderstandings and the difficulties which arise from them. The purpose of vanpooling is, after all, to achieve economy, safety, and convenience in commuting.

Every vanpool group develops its own unique personality. Helping everyone to feel welcome in the group and developing comraderie is important to the success of any van pool. Some groups have developed democratic approaches to each decision affecting the group, such as a route change to accommodate a prospective rider. Other vanpools have operated quite successfully where the driver makes essentially all of the decisions, bearing in mind that his "customers" have a choice of accepting these decisions or changing to another form of commuting. Whichever style you adopt, it should be consistent with your personality, and should be done in consultation with your riders for best results.

Try to take advantage of the opportunities vanpooling presents to make commuting a reasonably pleasant experience. A chance to read, catch some rest, converse and share with others are all possible within the same vanpool.

A few simple ground rules, agreed to before starting up, will avoid conflict down the road. At a brief vanpool formation meeting (agenda is included), preferably 2-3 weeks before your van is scheduled for on-the-road commuting, your group should set initial ground rules such as agreement on a smoking policy (vans are non-smoking unless a signed majority vote to the contrary is on file in the Commuter Services Office), radio policy (neutral background music works well), unscheduled stops (never off the regular van pool route but usually okay if at a different location on the van route), changes in the van route or times (usually done by consensus, with the driver exerting some leadership when agreement is not forthcoming), as well as delineating regular routes and stops at this time. Back-up carpool arrangements and wait times should also be agreed on. Although the process seems very formal, establishing an atmosphere of informality and cooperation will lead more quickly to the resolution of all issues. Occasionally, all present will not agree on the final majority plan, and a search for an additional new rider or two that will commit to the adopted set of rules may be required.

Most forming groups find it extremely advantageous to meet within a few days right after a vanpool starts. Nearly always there are adjustments to initial ground rules which the experience of a few days of operation requires.

If you are confronted with a seemingly impossible situation, though, remember that you are in charge. You ultimately have the right to remove anyone from the vanpool group, although rarely is such a drastic move necessary. Your other passengers will probably be grateful, and replacement riders are usually not that difficult to find.

CTS Offices

- ***Los Angeles***
  3550 Wilshire Blvd., Suite 300
  Los Angeles, CA 90010
  Business: (213) 380-7750

- ***Northern Los Angeles***
  712 E. Palmdale Blvd.
  Palmdale, CA 93550
  Business: (805) 267-5677

- ***Riverside & San Bernardino***
  1430 East Cooley Dr., Suite 120
  Colton, CA 92324
  Business: (909) 422-8088

- ***Ventura***
  950 County Square Dr., Suite 101
  Ventura, CA 93003
  Business: (805) 656-2477

- ***Commuter Matching:***
  (800) 286-RIDE

HB0337-1/93

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