


Exhibit E - Group Trip Requirements

 City of Phoenix HUMAN SERVICES DEPARTMENT	COMMUNITY SERVICES DIVISION SENIOR CENTER OPERATIONS PROCEDURE
SUBJECT GROUP TRIP REQUIREMENTS	DATE July 1, 2017

Purpose:

The purpose of this Senior Center Operating Procedure is to ensure that group trips are fairly allocated among the 15 senior centers and to ensure that members have opportunities to participate in entertaining, educational or inspirational trips throughout the city of Phoenix.

Process:

1. Passengers must be registered and current Senior Center members.
 - a. Trip fees of \$1 per trip (\$1 each way) will apply to center trips unless other payment arrangements have been made for the trip (example: Volunteer Recognition Event, Fit Phoenix events).
 - i. Members with Shuttle Cab waivers do not pay the \$1 fee per trip. Members must show their Shuttle Cab card to driver.
 - b. Senior Center members with caregivers associated with their case in CMS.
 - i. Staff must also register their caregiver for the trip.
2. Group trips generally begin and end at the Senior Center.
3. MV has three (3) transportation vehicles available. 30 and 18 passenger vehicles can be adapted to accommodate wheelchairs and large walkers or scooters. Vehicles will accommodate fewer passengers when they are adapted to accommodate other passengers with special needs. Note: Non-folding walkers take additional space.
 - a. 30 passenger bus
 - i. 30 ambulatory, or
 - ii. 26 ambulatory / 1 wheelchair or scooter, or
 - iii. 24 ambulatory / 2 wheelchairs (or 1 wheelchair and 1 scooter)
 - b. Two - 18 passenger buses (accessible with lift)
 - i. 18 ambulatory, or
 - ii. 16 ambulatory / 1 wheelchair or scooter, or
 - iii. 14 ambulatory / 2 wheelchairs or 2 scooters
 - c. Occasionally, a 7 passenger van is available (accessible with lift)

4. Each senior center may request, at maximum, six (6) field trips per month.
5. Each senior center will be limited to two (2) large trips per year. A large trip is defined as any off-site trip requiring more than 30 passengers (picnic, volunteer luncheon, special event, etc.)
6. Senior centers requesting trip participation of 19 to 30 members must be pre-approved by the coordinator (using more than one 18-passenger vehicle or the 30 passenger bus).
7. Each senior center will limit trip participation to 15 members and compile a standby list in CMS.
 - a. When possible, based on accommodation needs and cancelations, standbys will be allowed to participate in the scheduled field trip.
 - b. Standbys will be taken and allowed on the field trip in the order they signed up in CMS.
8. Senior Center staff will input the trip request in CMS by the stated deadlines. (See “Group Trip Senior Center Planning Process” on page 5.) Trip requests in CMS are to use the following naming convention: Trip – Trip Location (examples: Trip – Botanical Garden, Trip – Rocky Joe’s Restaurant, Trip – Walmart shopping).

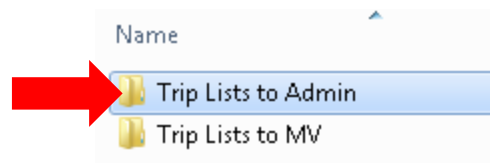
Event Date	07/13/2017
Event	Field Trip Cultural (RECREATION/SOCIAL)
Name/Description	Trip - Herberger Theatre
Room	Select an event location
	OffSite Locations ,Herberger Theater

11:30 AM-1:00 PM Trip - Herberger Theatre (RECREATION/SOCIAL)

9. Senior Center staff will submit the trip list/roster to Senior Services Admin by email – including date, time, number of ambulatory and non-ambulatory (i.e. walkers, wheelchairs, scooters, etc.) passengers by the Friday of the week prior to the week of the trip request.
 - a. The trip list/roster is to be scanned into the appropriate shared drive

<S:\CSSD\SrSvcsAdmin\Center Trips\Trip> Lists to Admin file

Behavior Contracts	5/10/2016 9:08 AM
Brochure Pictures	3/9/2016 11:13 AM
Center Programming Budget	4/13/2017 4:43 PM
Center Trips	5/1/2017 11:25 AM
CMS	5/20/2016 12:03 PM
Congregate Meals Weekly Assessments	2/9/2017 10:35 AM
Contracts	5/10/2016 9:08 AM



- b. The following file name convention is to be used:

Date.of.trip(mm.dd.yy)_Senior Center_Location CODE

(Example: 04.21.17_DEV_LUN)

- i. Location codes to be used: Any store (STR), Any museum (MUS), Any park (PRK), Center to Center (AD-Adam Diaz, CHI-Chinese, DV-Deer Valley, DW-Desert West, DEV-Devonshire, GAB-Goelet A.C. Beuf, HD-Helen Drake, MDN-Marcos de Niza, MDP-McDowell Place, PV-Paradise Valley, PEC-Pecos, SOW-Senior Opportunities West, SHA-Shadow Mountain, SM-South Mountain, SNY-Sunnyslope), State/County Fair (FAIR), Desert Botanical Garden (DBG), Phoenix Zoo (ZOO), Arizona Diamondbacks (AZDB), Phoenix Mercury (MER), Out to Lunch-any restaurant (LUN), Educational trips such as tours of PBS station (EDU), Movie theater (MOV), Herberger (HER), Light Rail (RAIL), FitPhx (FIT), Hiking (HIK), Health Fair (HLTH), other Special Event (EVT).

Monday	Tuesday	Wednesday	Thursday	Friday
Wk 1: Trip list can scanned to Shared Drive for Trip Dates in Wk3	Trip list can scanned to Shared Drive for Trip Dates in Wk3	Trip list can scanned to Shared Drive for Trip Dates in Wk3	Trip list can scanned to Shared Drive for Trip Dates in Wk3	Trip List Due in Shared Drive for Trip Dates in Wk 3, End of business (DEADLINE)
Wk 2: Senior Services Admin staff will send approved Trip lists to MV		MV will email center staff with trip schedule Revised trip roster due for Trip Date (a)	<i>Center staff is to connect with Senior Services Admin staff if there are discrepancies on MV trip schedule</i> Revised trip roster due for Trip Date (b)	<i>Senior Services Admin staff will work with center and MV to correct/ update discrepancies on MV trip schedule</i> Revised trip roster due for Trip Date (c)
Wk 3: Trip Date (a) Revised trip roster due for Trip Date (d)	Trip date (b) Revised trip roster due for Trip Date (e)	Trip Date (c)	Trip Date (d)	Trip Date (e)

- c. Failure to submit Trip List/roster to the Senior Services Admin shared drive by end of business on Friday of Week 1 will result in trip being canceled.
 - i. Coordinator must be contacted if there are extenuating circumstances which made it impossible to provide trip list by the deadline. Coordinator has the option of approving trip if trip list is to be submitted past the deadline.
- 10. MV may elect to cancel a trip if there are less than five (5) passengers on day of service.
- 11. Additional passengers or changes to the passenger roster are allowed with a minimum of three (3) business day advanced notification up to the capacity of assigned vehicle.
 - a. Staff can submit a revised roster reflecting any additions or changes to the roster three days prior to the trip date.
 - b. The revised trip list/roster is to be scanned into the appropriate shared drive <S:\CSSD\SrSvcsAdmin\Center Trips\Trip> Lists to Admin file
 - c. The following file name convention is to be used for revisions to the original trip roster, example: 04.21.17_DEV_LUN-REV
 - d. Senior Services Admin will forward revised trip rosters to MV.
- 12. Same day passenger cancelations are allowed.
- 13. Same day substitutions are permitted:
 - b. Must be the same passenger space type (ambulatory, wheelchair, scooter, walker)
 - i. Driver, at their discretion, can allow different passenger types in order to fill the vehicle to capacity.
 - c. Substitute information must be provided to the driver at time of pickup.

Group Trip Senior Center Planning Process:

1. Center staff are to submit trip requests in CMS by the 15th of the month prior to the program quarter and no earlier than the 1st of the month prior to the program quarter.
 - a. July-Sept deadline is **May 15**; enter trips in CMS starting May 1.
 - b. Oct-Dec deadline is **Aug 15**; enter trips in CMS starting Aug. 1.
 - c. Jan-March deadline is **Nov. 15**; enter trips in CMS starting Nov. 1.
 - d. April-May deadline is **Feb. 15**; enter trips in CMS starting Feb. 1.
2. Trip requests in CMS are to use the following naming convention: Trip – Trip Location (examples: Trip – Botanical Garden, Trip – Rocky Joe’s Restaurant, Trip – Walmart shopping).
3. A Senior Services Transportation committee will review trip requests.
 - a. Goal is to provide as many trips as possible as requested (maximum number of group trips per month is six).
 - b. Recurring trips will be honored if they do not conflict with other scheduled activities that have set dates.
 - c. Trips that are not possible, due to too many requests on the same date or other program needs (FitPhoenix, Reader’s Theater, etc.), will need to be rescheduled by the end of the month prior to the program quarter (example: July-Sept quarter must have all trips scheduled or rescheduled by May 31).
 - i. Trips will be prioritized when there are conflicts in the number and types of trips scheduled on the same day. The following trip priority has been established to ensure members can attend trips that provide necessities for the member:
 1. Grocery trips
 2. Special events with limited days of availability (health fairs, educational programs, Diamondbacks games, etc.).
 3. CSSD Senior Programs Special Events
 4. Herberger trips with limited program schedule
 5. Center to center special events
 6. Museums and movies
 7. Restaurants
 8. All other
 - ii. When possible, trips will be coordinated/combined with other senior center trips for more efficient use of transportation resources.
 1. The Transportation committee can assist with combining trips.
 - iii. Staff, whenever possible, should attempt to schedule trips with other senior centers that are in close proximity to each other.

- d. If rescheduling is necessary, the Transportation Committee will ask center staff to reschedule the requested trip.
 - i. Transportation committee will have all approved trips scheduled in the SharePoint calendar.
 - ii. Senior center staff are to review the SharePoint calendar to find open dates and reschedule the trip.
 - iii. Senior center staff are to reschedule the trip in CMS.
4. The Transportation committee will inform center staff that the trip is approved through CMS Trip approval by the 1st of the month prior to the start of the quarter.
 - a. Once trip is approved for the designated location, the location may not be changed.
 - i. Trip changes, due to unforeseen circumstances, can be accommodated with approval of the coordinator (for example: a restaurant closes down then another restaurant can be scheduled).
 - b. Trip approval can be noted in CMS by the change in the color of the font on the Center Event Calendar from Orange to Black:

Submitted →	<div>11:30 Trip - Herberger</div> <div>AM-1:00 Theatre</div> <div>PM (RECREATION/SOCIAL)</div>
Approved →	<div>11:45 Trip: Lunch at Golden</div> <div>AM-1:00 Corral</div> <div>PM (RECREATION/SOCIAL)</div>

5. Pre-purchase of tickets. For any trip requiring tickets, it is recommended that tickets not be purchased until AFTER the trip has been approved in CMS.
 - a. Pre-purchase of activity tickets does not guarantee that the trip will be approved.
6. The Transportation committee will monitor the number and types of Large Trips to ensure that each senior center is given equal opportunity to participate at venues that are limited.
 - a. If many centers request the same trip, for instance the State Fair, senior center names will be placed in a hat and a pre-determined number of senior centers will be selected to attend.
 - b. The opportunity to attend select Large trips will be rotated so all centers have the same opportunity to attend within a reasonable period of time.
7. The Transportation committee will keep a record of all special trips and allocate/offer special event trips to senior centers as evenly as possible. These trips include: AZ Diamondbacks, Desert Botanical Garden, Phoenix Mercury, Phoenix Zoo, State and County Fair. Chinese New Year at the Chinese Senior Center, Chinese New Year Celebration at Hance Park, etc.

Definitions:

LARGE TRIPS: Large Trips: A large trip is defined as any off-site trip requiring more than 30 passengers (picnic, volunteer luncheon, special event, etc.)

- a. There are two different types of Large Trips:
 - i. Center to Offsite Location/Venue –
 1. One center will host an event at an offsite location and invites other senior centers (example: Picnic at a park)
 2. One center will host an event at an offsite location for their own members (example: Volunteer luncheon)
 - ii. Offsite Location/Venue special event (State Fair, Mercury, Diamondbacks games) where more than one senior center can attend and there are limited dates available.
- b. Centers can schedule up to two (2) Large trips per calendar year.
 - i. Before the beginning of each calendar year (in November), the Transportation committee will convene with center staff to plan out the calendar year of Large trip events.
 1. Center staff should come to the meeting with events and proposed dates
 2. Center staff anticipates the Large trip will involve all three available MV vehicles.

RECURRING TRIPS: Recurring Trips are trips that occur on a regular basis each month or each week. For example, 2nd Thursday of the month – Hiking trip, or every Friday – Shopping

NO-SHOW/NO CALL: Member who does not show up for the trip and does not cancel ahead of time by notifying staff. Staff are to monitor No Show/No Calls and track their trip attendance record.

- 1st No-Show – Warning, A second No-show will result in reservation privileges being suspended for the remainder of the month;
- 2nd No-Show – No Trip Reservations allowed for the remainder of the quarter;
- 3rd No-Show – As a general guideline, members who have abused the reservation system and have been a No Show/No Call three (3) times will not be allowed to make trip reservations for six (6) months.

If space is available, someone who has been warned and was not able to make a reservation due to prior no-show status, may go on the trip as a standby on the day of the trip.

GROUP TRIP CHECKLIST

- ☐ Staff inputs request into CMS by stated deadline
 - Trip Committee reviews requests and approves schedule
 - Admin will approve trips in CMS and/or staff will be asked to reschedule trip
- ☐ Trips in CMS will show as approved when the font color changes from orange to black
- ☐ Trips will show up on Kiosk after it has been approved by Admin
 - Admin will email staff to inform them that trips have been approved
- ☐ Staff double check trip schedule in CMS
- ☐ Staff double check and update trip dates listed in their quarterly calendars
- ☐ Staff input members into CMS until trip reservation deadline
- ☐ **Trip cancelations – As soon as possible, staff inform Admin if trip is canceled**
 - Admin will inform other centers of an available trip date due to cancelation
- ☐ Staff submit trip list/roster in shared drive by Friday deadline
 - Admin will submit rosters to MV on Monday
 - MV will email staff a listing of trips scheduled for the next week by Wednesday or Thursday of the week prior to the trip
- ☐ Staff double check MV email with listing of trips
 - Staff notify Admin if their trip is not scheduled on MV listing of trips or if there are any discrepancies
- ☐ On day of trip, Staff notify MV and Admin if there are any problems such as a Late bus, trip canceled due to members not showing up, etc.