



One-call, One-click
Detailed Implementation
Training: Webinar #1

Introductions

Urban

- Alameda-Contra Costa Transit (CA)
- Kansas City Area Transportation Authority
- Northwest Valley Connect (AZ)
- Toledo Area Partnership Plan (OH)

Rural or Statewide

- Guam Regional Transit Authority
- Oklahoma United We Ride Council
- North Central New Mexico Economic Development District
- Senior Transportation Task Force of Greater Williamsburg (VA)

Please Describe

- Major challenges
- What you hope to learn

Purposes / Outcomes

■ Purposes

- Train on the activities that will move you from concept to implementation
- Build an understanding of what is required to achieve your vision

■ Outcomes

- A clear description of your one-call, one-click goals
- An action plan for your next steps
- Tools for you and others to use

Webinars and Assignments

- Webinars will include:
 - Content
 - Participation
 - Homework
- We will learn from each other
- This is a rapidly developing field

Training Topics

- **WEBINAR #1**
 - Introduction, Vision & Goals; Protocols, Processes, and Information related to each function;
- **WEBINAR #2**
 - Technology: For customers (including trip planning); for different functions; and for communicating between systems
- **WEBINAR #3**
 - Review functionality work
 - MOU's and other agreements
- **EXPO TRAINING**
 - Putting it all together: your action plan

Reverse Engineering

- A one-call center is the **end product**
 - It builds on a strong foundation
 - It develops iteratively
- Breaking down the steps is a key activity
 - Start by identifying the major areas where information or a decision is needed
 - Break these down into discrete steps on which you can take action.

Action Plan Steps

1

- Clarify the issue / need / problem

2

- Research: options and resources

3

- Determine specifics:
- How? What? When?

4

- Quantify costs and value

5

- Check-in: Are needs addressed?
- Do stakeholders support solution?

6

- Refine

7

- Implement

Clarify Each Issue or Need

- By the end of the training you will finalize goals and objectives and build an action plan for your next steps.
- Think in terms of defining activities
 - Clearly
 - Discretely
 - With a timeline
 - And identify a responsible party



A multiple choice question:

- What is your vision?
 - To make it easier for individuals and/or case workers to arrange transportation.
 - To improve ability to match riders with the most cost effective option appropriate to their abilities.
 - To improve productivity in service delivery.
 - All of the above

Match the following functions with a “vision”

Functions

- Eligibility – consolidate or simplify
- Trip planning for specialized services
- Information on available services (hours, area, etc.)
- Information on how to schedule a ride
- Joint scheduling
- Travel training

Vision

- Easier to access mobility options
- Better match riders with most appropriate and lowest cost service
- Improve productivity of service delivery

From Concept to Reality: Key Characteristics

- Key characteristics:
 - Clear sense of purpose
 - Broad-based support
 - Political leaders, grass-roots, agency board and staff
 - Realistic goals with successes along the way
 - Accountability
- Learning from others
- Be willing to re-think ideas when things don't fall into place.

From Concept to Reality: The Right Team

■ Leaders

- Understand and communicate the vision, benefits, and challenges to broad audiences.
- Assign work and assure outcomes match vision

■ Workers

- With the right mix of knowledge and willingness to work toward a common goal.
 - Knowledge of a wide range of programs
 - Project development and management
 - Technology

From Concept to Reality: Functions are your Foundation

- **Community needs:** what functions are desired?
 - By individual riders
 - By agencies
- **Available technology**
 - Can you achieve what is desired?
 - What path seems most promising?

From Concept to Reality: Institutional Structure

- Institutional and administrative activities
 - Will follow decisions on functions
 - Might include MOUs or seeking funding
- Consider
 - The structure for human services in your region
 - How are transportation services delivered?
 - What relationships need to be established between partners?

Research Options and Issues: Learn from Others

- Look at 3-5 examples of what others have done
 - For each function
 - For some institutional activities
- Identify which parts of each
 - Address your regional needs
 - Are realistic – financially, technologically

Determine Specifics

- What is each agency doing now?
 - Forms, policies, protocols
 - Who does what?
 - Relationship to rest of organization
 - What is reported?
- What is working? Where are there synergies?
What can be improved?

Strategies for Detailed Investigation

- Look for similarities and differences
- Identify why things are different:
 - Funding program requirements
 - Software requirements
 - Always did it a certain way
- Look at what is working and can be built upon; what is not working and can be improved
- Identify where changes can be made
 - Where it is cost effective to do so
 - The role of a one-call center vs. individual agencies in making improvements.

How Do We Use this Information?

- Build an action plan!
 - Identify functions included
 - Other organizational activities needed
- The facts, forms, and protocols of key functions will guide:
 - The functions included in your Center
 - The information you need to make decisions
- To break down the needed information into manageable steps.

Basic Functions

- Information and Referral
- Trip Planning
- Eligibility
- Scheduling
- Travel Training

Information and Referral Function Protocols and Other Information

- Current Resource Directory or I & R Services
 - What information is included? What is missing?
 - How do consumers and agencies access it?
 - How useful is it?
 - How many calls would it be likely to take a consumer to arrange a ride?
 - Is there a navigator available?
 - What information is provided on eligibility?

Information and Referral Function Protocols and Other Information

- Forms and Protocols
 - How is the information updated for each program or resource?
 - What forms are used?
 - What is the process?
 - Telephone calls, web-based?
 - Does it meet AIRS standards? Who is trained in AIRS in the region?
 - Who updates the information and what time is required?
 - How accurate is it?
 - How is the function operated?
 - Staffing
 - How many lines are operated at a time?
 - What telephone management software is used?

Information and Referral Function Protocols and Other Information

- Forms and Protocols
 - How are staff who answer telephone calls trained?
 - In transportation services?
 - In identifying related needs?
 - In I & R practices?
 - How do callers answer the phone? What is their spiel?
 - What quality control is in place?
- Resource: *“N4A One-Call one-Click Operations Guide”*

Information and Referral Function Examples to Consider

- One-Call:
 - Regional and other *2-1-1* and *5-1-1* networks
 - Successful one-call centers
 - Network at CTAA Expo
- One-Click:
 - Existing trip planners from one-call services
 - Inland Empire *5-1-1* web-page
 - <http://www.ie511.org/veterans-transportation.aspx>

What is an Action Plan?

Protocols and Practices

Information, Referral, and Options: Call-Taking Guide

Activity	Status	Notes	Responsibility	Due Date	Follow-up Activities
Identify number of lines and how they will be answered.	Not Started	<ul style="list-style-type: none"> How many lines are needed? Can existing lines be forwarded to dispatch center? 	Technical Working Group		
Identify text for answering each line.	Not started	<ul style="list-style-type: none"> Training manual template has been provided 			
Protocol for updating and sharing information	Not started	<ul style="list-style-type: none"> Address for before and after there is a single system. 			

Customer Responsibility Standards

Standards for no shows, late cancellations, etc.	Not started	<ul style="list-style-type: none"> Identify and compare existing terminology and rules at each provider. Recommendations made for agency consideration 	Technical Working Group		<p>Identify any variation that can be (or needs to be) accommodated.</p> <p>Adoption of common standards can occur before CAD system is in place, but final decisions should wait until procurement is completed.</p>
Agency consideration, adoption	Not started	<ul style="list-style-type: none"> 	Agency directors		



Building Your Action Plan

- Your action plan checklist
- First step is identifying your categories
 - Functions
 - Identify an administrative or institutional category too

Homework Assignments

1. Discuss three “vision statements” and develop a consensus on role of each in your plan

- Easier to access and arrange transportation
- Better match riders with services
- Improve productivity through scheduling

2. Identify the functions you want to consider under each statement you have as a priority

- | | |
|-----------------------------------|--------------------------------------|
| - I & R: about available services | - I & R: trip planners |
| - I & R: assistance navigating | - I & R: Cost of different providers |
| - Eligibility | - Scheduling |
| - Travel training | - Other |

Homework Assignments, continued

3. Set up draft categories that your Action Plan will include.

- Functions
- Administrative, Financial, or Institutional

4. Begin investigating the steps you may want to include in one of those categories.

- Reviewing sample document
- Brainstorming
- Look at websites
- “Phone a friend” “Throw me a line”

Other Functions

Eligibility Function

Protocols and Other Information

- For each program or service with eligibility criteria:
 - Obtain form
 - Identify the steps in determining eligibility
 - What database structure is used? How is it updated?
 - What is the nomenclature?
 - How is the information used and reported?
 - See Toolkit, section IV, pages 8-9, for more ideas.

Scheduling Function

About Reservations and Scheduling

- Consider the ways in which trips are, or could be, scheduled with each service.
 - When a passenger calls a service to request a trip, is the request
 - Scheduled and confirmed immediately
 - Confirmed at a later point – if so when?
 - Could the passenger
 - Be asked to call the “best match” provider?
 - Be patched through to an existing dispatcher for the “best match” provider?
 - Would it be possible for the One-Call Center to
 - Be able to see the schedules of various providers?
 - Be able to put in a trip request for one or more providers?

Scheduling Function

Protocols and Other Information

- For each transportation service
 - Identify the current scheduling system (manual, Excel spreadsheet, scheduling software)
 - Clarify eligibility of individuals and trip purposes
 - Are any trip purposes given priority?
 - Identify the steps and decision-points in the scheduling process.
 - When are reservations confirmed?
 - When are trips scheduled into final driver runs?

Scheduling Function

Protocols and Other Information

- How are drivers' trip manifests generated? What do they include?
- How are actual trips reported back into the system?
- How is the scheduling system related to the payment/billing function?
- How are service policies accounted for in the scheduling system?
- What staffing and operator stations exist? (Number of staff and stations; number of lines, software, and equipment at each station)

Trip Planning

Protocols and Other Information

- What information is available today?
 - Web-based trip planners for fixed route services
 - Web-based systems for identifying potential providers
 - Staff who assist riders in navigating available options
- For each, identify...
 - What information is included
 - What providers are covered
 - How they function: protocols for updating and maintaining
 - Forms used for gathering information or updating
 - Training that is provided (staff training; AIRS protocols)
- Test the systems to find strengths and weaknesses

Travel Training

Protocols and Other Information

- What travel training is available for:
 - Paratransit riders to use fixed route or other options?
 - Specialized transportation riders to use fixed route services?
- What agencies provide the services?
 - How are they advertised?
 - How are they funded?
- Describe how the programs operate.
- Identify staffing, time required for training, and other resources needed for each program