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](http://www.ie511.org/veterans-transportation.aspx)
What is an Action Plan?

### Protocols and Practices

#### Information, Referral, and Options: Call-Taking Guide

<table>
<thead>
<tr>
<th>Activity</th>
<th>Status</th>
<th>Notes</th>
<th>Responsibility</th>
<th>Due Date</th>
<th>Follow-up Activities</th>
</tr>
</thead>
</table>
| Identify number of lines and how they will be answered. | Not Started | - How many lines are needed?  
- Can existing lines be forwarded to dispatch center? | Technical Working Group |          |                      |
| Identify text for answering each line.            | Not started | - Training manual template has been provided                         |                         |          |                      |
| Protocol for updating and sharing information     | Not started | - Address for before and after there is a single system.             |                         |          |                      |

#### Customer Responsibility Standards

| Standards for no shows, late cancellations, etc. | Not started | Identify and compare existing terminology and rules at each provider.  
Recommendations made for agency consideration | Technical Working Group |          | Identify any variation that can be (or needs to be) accommodated.  
Adoption of common standards can occur before CAD system is in place, but final decisions should wait until procurement is completed. |
| Agency consideration, adoption                  | Not started | -                                                                     | 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 7 R: assistance navigating
   - I & R: Cost of different providers
   - Eligibility
   - Scheduling
   - Travel training
   - Other
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