All phones have been muted. To speak, raise your hand. Then, even before being called upon, press *6 to unmute your phone. When you’re done, press *6 to re-mute.
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

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Follow-up from Webinar #1

- Recap of key points
  - Approach to implementing One-call, One-click services
  - Vision leads to Functions, the foundation of your plan
  - Research options, get specific, and refine options

- Homework Questions:
  - Was your team able to reach consensus on identifying the categories for your action plan? (#1 = not at all; 5 = yes)
  - What did you learn from trying to identify detailed steps for one category?
Software We Will Discuss Today

- General purpose software programs
  - Documents, spreadsheets
  - E-mail, calendars
  - Database programs

- Proprietary and “open source” software

- Wiki applications

- Software for major functions in One-call, One-click Centers
Proprietary versus Open Source

- **Proprietary software**
  - Built by a company and maintained by the company
  - You purchase and, for purpose-built programs, pay a licensing fee to maintain it.

- **Open-source software**
  - Built and maintained by a community of users
  - Development is directed by those users with an interest in it
  - Often has a strong public or civic orientation
    - Code for America
    - Open Referral
    - Open Plan

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More on Open Source

- Open indicates availability
- Open means ‘free,’ as in ‘free speech’
- Open does not necessarily mean ‘anything goes’
- Open does not necessarily mean ‘free’ as in without cost.
- Open data entails
  - Access
  - Reuse and Redistribution
Private and Public Sector Roles

- The private sector is primarily responsible for software development
  - This government is not suited for this function
- Most information about software comes from private sector marketing.
- There is a public sector interest in having software that is interoperable.
  - To maximize the investment in private sector investments
  - To assure that needed programs are available
Wiki Applications

- A web application that allows content creation in collaboration with others
  - content is created without any defined owner or leader
  - allows structure to emerge according to needs
- “The simplest online database that could possibly work” – Ward Cunningham, developer of first Wiki software
- Ride Connections in Portland, OR has used Wiki applications for detailed provider information.

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Examples of Software for Key Functions

- **Scheduling Programs**
  - Modular structure
    - Many modules: fixed route, demand response, human service, dispatch, and various back office functions
    - Can track vehicles if Automatic Vehicle Locators (AVL) or GPS is included and module purchased (used in dispatch function)
    - Can automatically call passengers to confirm (if this module is purchased)
  - Agency can host or web-hosting is available for most systems
  - Many vendors, serving varied markets

- **Trip Planning Software:**
  - Fixed Route: Agency-built or Google Trip Planner
  - Demand Response: programs to identify options by filtering by trip characteristics

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More Examples

- **Information and Referral Software**
  - Alliance of Information and Referral Systems’ XSD (and the AIRS / 2-1-1 Taxonomy) – supporting the interoperability of I & R resources
  - Open Referral projects: SF and DC projects developing common standards and open platforms for the sharing of community resource directory data

- **5-1-1 Software**
  - Most proprietary; Open Source is under development
Conclusion

- There are many software choices.
  - Your choices will be determined by functions and options / IT resources in your community.
- You will use a variety of software
  - Some may be open and other proprietary
- Understand your team’s technical capacity
- Build a broad understanding of software options
- Primary systems are needed for each function
Technology for Key Functions of One-call, One-click Services
## IT for Information and Referral

<table>
<thead>
<tr>
<th>Purpose</th>
<th>TELEPHONE SYSTEM (2)</th>
<th>PROVIDERS</th>
<th>TRIP PLANNING</th>
<th>ELIGIBILITY</th>
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</thead>
<tbody>
<tr>
<td></td>
<td>Tracking Call Performance</td>
<td>Managing Provider Information</td>
<td>Trip Planning - Fixed Route</td>
<td>Managing Eligibility Information</td>
</tr>
<tr>
<td></td>
<td>Call Processing Systems with Telephone Management Software</td>
<td>Database of Providers</td>
<td>Trip Planning Specialized Services</td>
<td>Service Data Center - part of scheduling program</td>
</tr>
<tr>
<td>Manual Items</td>
<td>Set-up for flow of lines and messages</td>
<td>Can start with notebooks; Need protocols for updating</td>
<td>Static data on travel options by origin or destination</td>
<td>Processes for updating database</td>
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</tbody>
</table>

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I& R - Telephone Management Systems

- Standard business telephone system
- Call Processing Systems
  - Network multiple lines through a core processor
- Telephone management software
  - Tracks and reports calls
- Web-based tools:
  - Link telephone systems to computers (VoIP)
  - Link to cell phone systems (Wi-Fi)
- Service into the location – capacity?

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IT for Provider Information

- **Methods**
  - Notebooks
  - Database programs
  - Wiki applications
  - Google Sites

- **Consider**
  - Information needed
  - How to collect
  - How to maintain

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MediaWiki Example: Ride Connection

Mid-County RideAbout

Mid County RideAbout is a 5 day per week community shuttle service, operated by Metropolitan Family Service in the Mid-County U-Ride.

**Contents**
- [Hide] [Hide]
  - 1 Customers Served
  - 2 Requesting Trips
  - 3 Service Days and Hours
  - 4 Calendar: Mid County

**Customers Served**

Mid County RideAbout serves adults over the age of 60, and people with disabilities.

**Requesting Trips**

Trips must be requested at least 2 business days in advance by calling the Ride Connection Service Center at 503-226-0700, emailing triprequest@midcounty.org, or completing the form.[1]

The shuttle can also deviate to pick up customers at nearby locations, or to drop them off at other shopping destinations near the route.

**Service Days and Hours**

Service is available in different neighborhoods and to different destinations depending on the day of the week. Mid County RideAbout operates Monday through Friday.

**Monday**

Monday is reserved for recreational trips and trips to special shopping destinations. Any Mid County U-Ride customer can request to participate in Mid County RideAbout bus. The flyer can also be found at:

**Calendar: Mid County**

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<tr>
<th>January 2013</th>
<th>February 2013</th>
<th>March 2013</th>
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<td>May 2013</td>
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<td>October 2013</td>
<td>November 2013</td>
<td>December 2013</td>
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Ride Connection Green Book

How to Schedule GroveLink Deviations

Deviation Step by Step Procedures:

- Get all of the necessary information (Name, Address, Phone number, Mobility etc...)
- Decipher if the deviation is a Door to Route or Route to Door?
  
  If it is a route to door we will need to know where they will be on the route and where they would like to be dropped off. The pickup location is within 0.5 miles of the route and where they would like to be dropped off on the route.
  
  - What time do they want to be picked up or dropped off?
  
  Forest Grove is pretty small so the distance in minutes for most deviations will be within 1 to 2 minutes of the route before the pickup address and then see what time the bus will be arriving at that stop and adjust the pickup time subtract the stop time. If the drop off is on route but not at a stop then look for the closest bus stop to the drop off and adjust.
  
  Give them more than 1 option for times. If the requested deviation is more than 0.5 miles from the route ask if the requested deviation will have any interference from driver breaks or shift changes.
  
  - Identify which bus the deviation belongs to:
  
  Using the cheat sheet find the time or closest time of the deviation and look at the color of the text. The bottom part of the schedule sheet is the cheat sheet. The top half of the schedule sheet reports routes. The color of the text is red, yellow, blue, and green.
I & R - Trip Planning

- Fixed route standard is GTFS: what is available in your area?
  - For local services? Regional?
  - How maintained?

- Specialized / demand response
  - GTFS not yet available
  - What static methods provide useful information?
  - Role of telephone operator?
I & R - Trip Planning, continued

- Consider information on:
  - Fixed and flexible services
    - Client specific and general public
  - Eligibility – client type and trip purpose
  - Cost, when available

- Examples
  - Pima Find-a-Ride – National RTAP (LINK HERE)
  - DRMAC (LINK HERE)
  - Tri-Met

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Transportation

1. Select a Service

- Bus Service
- Car Service - Volunteer Drivers
- Car Services
- Non-emergency medical transportation
- Public Transportation
- Taxi Service
- Transportation, other
- Van Service

2. Select a Neighborhood (optional)

Neighborhood:

- KS-Johnson-Desoto

3. Then Start Your Search

Find Providers

National Center for Mobility Management
Welcome to the *Midcoast RideFinder* website, linking people to transportation.

This site is your directory to get around in mid coast Maine. Whether you want to fly out to the islands, visit a friend, go shopping, or simply need a ride to the doctor's, this *RideFinder* will give you the most current information available as to what your options are.

When searching for a ride, you will search the county from where you will begin your trip. To make your transportation choice easier, we have included symbols where applicable to indicate whether a provider is wheelchair accessible, free or accepts MaineCare as a form of payment:

- Transportation provider will accept MaineCare as a form of payment.

- Transportation provider has wheelchair accessible vehicles.

- Transportation provider is free of charge, certain criteria may apply.
Refer a passenger

When is the trip?

- May 2014

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Leaving at: 9:00 AM
Returning at: None – One Way

Is the passenger an access-a-Ride customer?

- Yes
- No

For more information on access-a-Ride eligibility, please visit [http://www.rtd-denver.com/accessARide.shtml](http://www.rtd-denver.com/accessARide.shtml).

What is the purpose of the trip?

- Other / Prefer not to state
- Medical
- Cancer treatment
- Personal care
- Nutritional needs
- Social
- Grocery shopping
- Dialysis

Note: If you choose not to select a day/time, your results will not be as accurate, as some providers require notice of 1-7 days and some only serve certain routes on certain days.
I & R – Eligibility

- Determining Eligibility
  - Process oriented
    - How can it be simplified for clients?
    - Determining eligibility for multiple programs
    - Sharing information
  - What processes exist for key programs:
    - Transportation providers (Paratransit, multipurpose)
    - Human service programs (Veterans, Medicaid, TANF)
  - How is eligibility for individual trips confirmed?
I & R – Client Database

- IT Options
  - Spreadsheets
  - Database programs
  - Part of scheduling software

- Consistent nomenclature? Inter-changeable?

- Updating

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### IT – Scheduling and Dispatch

- **Scheduling:** all arrangements for a trip, through initial confirmation
- **Dispatching:** From driver manifest through trip delivery

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<thead>
<tr>
<th>Purpose</th>
<th>TELEPHONE CONNECTION</th>
<th>READ-ONLY ACCESS</th>
<th>READ-WRITE ACCESS</th>
<th>JOINT SCHEDULING CENTER</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Purpose</strong></td>
<td>Leave caller with provider</td>
<td>Verify trip scheduled and completed</td>
<td>Direct caller to a viable provider</td>
<td>Verify trip scheduled and completed</td>
</tr>
<tr>
<td><strong>Description</strong></td>
<td>Both schedule and dispatch between consumer and provider.</td>
<td>Call center verifies with provider. Follows up with consumer if trip cannot be scheduled.</td>
<td>Ability to see the schedules of multiple providers enables you to see where capacity exists</td>
<td>This requires the provider confirm the trip is scheduled and potentially completed.</td>
</tr>
</tbody>
</table>
IT – Scheduling and Dispatch

- Many systems start with a spreadsheet
- When is scheduling software needed?
  - 2,000 trips monthly or 100 one-way trips daily
  - Equates to 50 people making round trips
  - How many are subscription trips?
  - What is the cost per trip over “life” of system?
  - How will it increase productivity?

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IT – Scheduling and Dispatch

- Reservation and scheduling software: basics
  - Database info: customers, eligibility, fares
  - Mapping
  - Computer-Aided Dispatch (CAD) to schedule trips
  - Billing / payment / reporting functions
  - Communications
    - Between system, dispatch staff, and drivers.

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IT – Scheduling and Dispatch

- Additional features
  - Interactive voice response (IVR): automated calls to riders
  - Customer notification via e-mail or text messaging
  - Automatic vehicle location (AVL) using GPS
  - Digital communications between drivers and dispatchers using a mobile data terminal (MDT), often a tablet computer
  - Access to providers reservations and scheduling systems (read-only or read/write). Can be done through a web portal
Sharing Information Between Providers

- **Methods**
  - Fax and e-mail is common

- **Sharing digitally requires that systems “talk” to each other.**
  - Today, a “translator” is used
  - In future, we hope for data standards
  - With adequate call volume, purchasing a translator will save significant staff costs.
Selecting the Right Technologies

- Geographic size of service area
- Anticipated call volume
- Number and type of transportation resources
- Scope and purpose of the service
- Functions included
- Relationship between I & R, reservations, scheduling, service delivery, and customer service
Remember....

- The work of reaching agreements with partners on how costs are shared, how functions are carried out is a necessary foundation.

- Technology should help you to perform a given function with greater cost efficiency.
  - Know the functions before you purchase technology.

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