



One-call, One-click

Detailed Implementation Training: Webinar #3

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Training Topics

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- **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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Recap from Webinar #2

- The functions of your OCOC center will determine the technology you choose
- You will use a variety of software and equipment
- Understand your team's technical capacity
- Build a broad understanding of your software options before selecting

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Follow-up on Homework

- I'm a session behind you: I was only able to review assignment one in detail after the second webinar.
 - I provided comments or made calls to half of you
 - Amy, Sheryl and I will work with the rest of you in the next two weeks
- Comments on what your team has learned or what has been useful?
- Questions about particulars?

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The Value of Your One-call, One-click

- You have identified needs your OCOC will meet.
- Translate that to the value it will bring to the region
- To convince partners to join and to help fund, you will need to convey the value of your undertaking

Three visions

- Improve access to services
- Better match riders with appropriate services
- Improve productivity

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Value

- **Some value can be monetized**
 - Reducing call volume through improved customer information
 - Transferring an expensive taxi ride to a less expensive option
- **Some cannot**
 - Saving me time in making trip arrangements for my mother
 - The cost incurred when a passenger skips important medical care because he or she doesn't know travel options.
- **Stakeholders will hold a perceived value**

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Talk Values and Costs with Partners

- Identify the value of the proposed activity
- Compare it to the cost
- Who will incur the costs?
- Who will realize the benefits?
- How do you work out an equitable arrangement?

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Get Specific – Develop Budgets

- Human service agencies and transit agencies have different approaches to budgets
- Your goal is to translate so you are talking the same language.
- Every agency receiving public funding follows similar rules.

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Cost Sharing Agreements

- Agreement is needed on:
 - Budget for the program
 - Sharing costs
- Work to align
 - Funding and benefits
 - Funding, authority, and responsibility

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Questions on value or cost sharing?

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Agreements

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A Layperson's Perspective

- An attorney needs to be involved in developing all agreements.
- Clarifying the “What, Why, and How” of any agreement you are considering will enable your attorney to work most effectively for you.
- There is considerable difference in how agreements or MOUs, are used in different states
 - What is presented here may vary from what happens in your locale.

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Terminology

- Agreements and Contracts
 - Used interchangeably here
 - Written and legally enforceable
- Intergovernmental Agreement (IGA)
 - An agreement between governmental entities
- Joint Powers Agreement (JP Agreement)
 - A type of IGA, used in certain states

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Terminology, continued

- Memorandum of Understanding (MOU)
 - A more formal alternative to a “gentlemen’s agreement”
- Memorandum of Agreement (MOA)

The key difference in these five instruments is the legal standards to which they conform. Regional differences both in laws and what is customary also play a role.

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Coordination Agreements

General Agreements and IGAs

- A contract between two or more entities that is legally enforceable.
- Are flexible
 - Can be used for simple or complex activities
- Typically include compensation provisions
 - Parties to the agreement are responsible for funding
 - May be renewed or changed over time.
- Term may be one year or more than one year

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Memorandum of Understanding

- An MOU describes a mutually agreed upon intention between parties
- Most often used in cases where parties
 - Do not wish to create a legally enforceable agreement
 - Cannot create a legally enforceable agreement
- Documents and provides a clear understanding of
 - Expectations of each party
 - How the arrangement will function
 - Roles and responsibilities of each party

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Preparing Agreements

- Keep initial discussion to the basics
- Clarify what the parties agree to
- Build a common understanding of what will be accomplished.
- Perceptions and definitions vary
 - The act of putting them into words clarifies differences
- Plan on several revisions before working with your attorney

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Questions to Address

- A basic description of what the agreement will accomplish
- Why an agreement is being prepared
- How the parties will accomplish the tasks at hand.
 - Basic roles and responsibilities of each party
 - What services each party contributes to the arrangements

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More Questions to Address

- Term of the Agreement:
 - When it starts and how long it lasts
 - How will the agreement be terminated? Can termination be by one or both parties? Under what circumstances? Or, does termination occur at a fixed end date?
 - What happens at the end of the term?
 - Will the agreement be automatically be renewed?

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Questions to Address for Compensation

- What is the amount of the compensation?
 - Is this a fixed amount?
 - If it varies by services provided, what circumstances will affect the amount of compensation?
- What will be the invoicing and reporting requirements of each party?

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More Questions to Address

- What approval will be needed and who will sign?
- For IGAs, clauses addressing insurance, indemnity, privacy, and similar requirements will be needed.
 - The legal counsels of each party will identify these as appropriate.

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Sample Agreements

- Transit Cooperative Research Program Report 101: Toolkit for Rural Community Coordinated Transportation Services:
 - Appendix G – examples of IGAs to enhance coordination
- Vehicle Sharing Template
- Confidentiality Agreement

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- Questions about agreements?
- What coordination agreements do you presently have in place?
- What agreements will you need to implement your plan?

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Next Steps

- Assistance

- Amy, Sheryl, and Suzanne will assist teams

- Homework

- A scenario
- A napkin pitch
- Web-site review
- Continue to work on identifying categories and steps

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Scenario: Uncle Joe and Your One-Call/One-Click Center

Creating a scenario helps you

- Envision how your one-call or one-click services will operate in real life
- Identify steps you may have not thought about
- Cement the value of your service to those who will use it

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Meet Uncle Joe

(or create your own “persona”)

- Vietnam veteran, age 74
- Just had hip replacement and completed in-patient rehabilitation
- Follow-up appts at VA hospital center (55 miles away)
- Lives in next county
- Is uncomfortable driving 55 miles to the big city

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Napkin Pitch

Developing a “napkin pitch” helps you

- Distill your envisioned solution into its simplest form
- Crystallizes the idea so that it is easily communicated to other potential partners, funders, others

NAPKIN PITCH: [Concept Name]

Summarize and communicate your concept

The Big Idea

- Describe the concept.

Needs/Benefits

- What stakeholder(s) wants this?
- What unmet needs does it serve?
- How will the stakeholder(s) benefit?
- How will it further our community's goals?

Execution

- How will we deliver?
- What assets and capabilities does this leverage or require?
- What partners do we need?

Business Rationale

- How will this address the opportunity/challenge our team has defined?
- Is there any duplication between our proposal and what already exists?
- What makes us uniquely capable of delivering this?
- How will our funders react?
- How will we sustain our offering?

Source: *Peer Insight*



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At EXPO

- Session details
 - 8:30-10:30 AM Central time on Thursday, June 12
 - Amy, Sheryl, and Suzanne will assist teams
- First hour: working with team to refine your plan
- Second hour: you present
 - Your “Napkin Pitch” and scenario
 - Details of your action plan