One-call, One-click

Detailed Implementation Training: Webinar #3

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
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

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.
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?
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
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
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?

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.
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.
Cost Sharing Agreements

- Agreement is needed on:
  - Budget for the program
  - Sharing costs

- Work to align
  - Funding and benefits
  - Funding, authority, and responsibility
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.

Questions on value or cost sharing?
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.
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.
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
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.
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
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
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

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.
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

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.
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?
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?
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.

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.
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
Questions about agreements?

What coordination agreements do you presently have in place?

What agreements will you need to implement your plan?
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

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.
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

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.

---

National Center for Mobility Management
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
Napkin Pitch

Developing a “napkin pitch” helps you

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

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.
# NAPKIN PITCH: [Concept Name]

**Summarize and communicate your concept**

<table>
<thead>
<tr>
<th>The Big Idea</th>
<th>Needs/Benefits</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Describe the concept.</td>
<td>- What stakeholder(s) wants this?</td>
</tr>
<tr>
<td></td>
<td>- What unmet needs does it serve?</td>
</tr>
<tr>
<td></td>
<td>- How will the stakeholder(s) benefit?</td>
</tr>
<tr>
<td></td>
<td>- How will it further our community’s goals?</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Execution</th>
<th>Business Rationale</th>
</tr>
</thead>
<tbody>
<tr>
<td>- How will we deliver?</td>
<td>- How will this address the opportunity/challenge our team has defined?</td>
</tr>
<tr>
<td>- What assets and capabilities does this leverage or require?</td>
<td>- Is there any duplication between our proposal and what already exists?</td>
</tr>
<tr>
<td>- What partners do we need?</td>
<td>- What makes us uniquely capable of delivering this?</td>
</tr>
</tbody>
</table>

Source: Peer Insight
One-call, One-click

Detailed Implementation Training: Webinar #3
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

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.