

iv. ASSESS RESOURCES & NEEDS

Guide To Beginning ONE CALL–ONE CLICK Transportation Services

In the next few chapters you and your partners will:

- Decide if a one call—one click service for transportation and other mobility options is appropriate for your community,
- Determine the service’s suitable functions, and
- Lay the groundwork for next steps. (Support for taking next steps and building the foundation for implementation are described in **Chapter VII: Establish the Action Plan.**)

But first...

PULL TOGETHER YOUR PARTNERS

Developing a one call–one click services is a complex, long-term endeavor. Effective services are rooted in solid community partnerships that are cultivated over time and have successfully addressed partnering challenges. Your partnership for a one call–one click project may grow from existing collaborations—such as a core group established for mobility management or transportation coordination activities—or may be a brand new direction for your community. Even if it is based on an existing collaboration, it will most likely bring in new partners, as the most successful partnerships are typically diverse and active, and collaborate with a wide range of businesses and agencies, such as state and local departments of human services, health, and transportation. Case study participants (see Local Profiles) reported substantial community involvement with wide-ranging meetings to inform community members about services, discuss their needs, and strategize about how to address those needs.

DEFINE YOUR PROJECT VISION AND GOALS

Whether it is new or existing, the partnership’s cohesiveness and sustainability will rest on all members having the same understanding of the project and being committed to its achievement. Below are essential, preliminary steps to ensure all partners can agree on where they want to go and how they will get there:

1. Determine a vision for your community related to the issue of transportation access. This is a picture of what you would like your community to look like in five to ten years, and is based on the partners’ shared values. Make sure every member of the partnership has a role in forming this vision and can support in its final form.
2. Establish goals for the project. The goals should flow from your vision statement. Think of the goals as what you want to achieve along the road toward your vision. For example, one goal that would support improving transportation access is to ensure people can connect to one source to learn about, schedule, and connect to a ride.
3. Determine the strategies and the specific tasks by which you will achieve those goals. For example, a one-call center for transportation information would be one strategy for ensuring people have the information they need to access transportation. Another strategy might be providing transpor-

There may already be discussions about mobility management, coordination, or livability taking place in your community. To learn more, contact your regional or metropolitan planning organization, local transportation agencies, or state DOT to identify current initiatives in your area.

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tation information to human service agencies. Chapters IV and V will help you determine whether a one call–one click strategy is appropriate for your community.

4. Identify measurable outcomes for the tasks. For example, one outcome for a one-click website might be a target number of people who access the website each month.

Bring your partnership together to work on Steps 1 and 2, above, before proceeding any further. Then, before completing steps 3 and 4—leading to specific actions to implement your goals—develop a clear picture of where your community is now on the issue of transportation access. The following section will guide you in doing this.

ASSESS RESOURCES AND NEEDS

An initial assessment of resources and needs is a valuable first step. The assessment will provide critical information on:

- What services are available and where there are gaps,
- How the various service providers conduct their business,
- The community connections between various services,
- The needs of customers, and
- The needs of the potential partners.

Completing this step requires partners, and the broader the foundation of stakeholders, the better the outcome will be.

Is there a group in your community that guides mobility management, coordination, or livability efforts?

___ Yes ___ No

If so, then you should work with that group to complete this assess-

ment.

If a formal process doesn't already exist, you may need to gather a working group of individuals with the motivation to improve mobility and access in your community.

The information and questions posed on the pages that follow will guide you in developing your assessment. This material is similar to information that many transportation systems have developed as part of their coordination and mobility management efforts, or as part of an assessment of needs for seniors, low-wage earners, or other residents.

But this process also goes deeper. The assessment process should provide a clear understanding of whether and how a one-call service can meet the needs of customers and the partners who will make this initiative a success. It will assist you in identifying the issues that need to be addressed and deciding on the best way to address those issues. It will also provide you with one of the tools needed to develop a successful action plan.

A. MOBILITY RESOURCES INVENTORY

As part of the Human Services Coordination Transportation Plan (HSCTP) that is required under federal transportation law,¹ many communities have already prepared an inventory of available com-

¹ The Safe, Accountable, Flexible, Efficient Transportation Equity Act, A Legacy for Users (known as the "SAFETEA-LU") was enacted in August 2005. The HSCTP requirement, that became effective on October 1, 2006, applies to communities receiving FTA Section 5310, 5316 and 5317 transportation grant funds (http://www.fta.dot.gov/funding/grants_financing_263.html).

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munity mobility resources, including information resources. This HSCTP provides an excellent starting point for answering the questions posed in this section. (Many coordinated transportation plans are available at www.ctaa.org/nrc under “Tools and Resources.”)

TABLE IV-1: Types of Mobility Services

<input type="checkbox"/>	Fixed-route transit
<input type="checkbox"/>	Deviated fixed-route transit
<input type="checkbox"/>	Volunteer-driver program
<input type="checkbox"/>	ADA Paratransit: curb-to-curb
<input type="checkbox"/>	ADA Paratransit: door-to-door
<input type="checkbox"/>	Demand response: door-to-door
<input type="checkbox"/>	Older drivers: driving skills
<input type="checkbox"/>	Older drivers: driving-transition programs
<input type="checkbox"/>	Carpool or rideshare programs
<input type="checkbox"/>	Vanpool programs
<input type="checkbox"/>	Voucher programs to provide fare assistance
<input type="checkbox"/>	Emergency car repair or gas vouchers
<input type="checkbox"/>	Bicycle-sharing programs
<input type="checkbox"/>	Travel training
<input type="checkbox"/>	Transportation buddy program
<input type="checkbox"/>	Car-loan programs
<input type="checkbox"/>	Car-share programs
<input type="checkbox"/>	Individual transportation planning assistance
<input type="checkbox"/>	Taxi services
<input type="checkbox"/>	Intercity bus services

Table IV-1 illustrates many types of mobility services that may exist. Check all that are available in your region.

If your community does not have an updated inventory of private, public, and non-profit transportation services, this is a good place to begin. Not only does it provide a way to share information on the services that are available, but it helps to build a common understanding of where there are gaps or obvious duplications in services.

Is there one major provider that is responsible for several of the programs?

_____ Yes If so, who: _____
 _____ No

In addition to the *type* of services available (Table IV-1), identify how each primary community-based program provides transportation for its clients/customers.

Does your community lack fixed-route bus service but have transportation programs run by various human service or other community-based organizations?

_____ Yes _____ No

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List programs:

How are services delivered for Medicaid non-emergency medical trips?

For medical or training trips for veterans?

For programs serving individuals with developmental disabilities?

For senior nutrition trips?

These are often demand-response services provided with not-for-profit agency vehicles. Drivers may be paid program staff, paid professional drivers, or volunteers. Some services may be operated by private sector providers. Each of these services is an important part of your community's total transportation resource.

In collecting information on available transportation services, identify key details such as those listed on the Mobility Assessment Worksheet on page 8. Make as many copies as you need and fill out one worksheet for each program.

You may be able to have the various providers or program staff complete the worksheets. Alternatively, you may have one person collect the information through an interview. Complete what you can and then go back to fill in the missing information.

Does your community have a resource guide or website listing widely available mobility services?

Yes No

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If an individual or caregiver needs information on options, who do they call?

How does agency staff find out the transportation options that are available for its clients?

Is there a transit agency that provides information on transit services?

Yes No

List:

Do transportation providers only respond to questions about their own services?

Yes No

Which agencies provide information about other transportation options such as rideshare services (carpools, vanpools), travel training, volunteer-driver services, bicycle or pedestrian options, or travel training?

Is there an existing (transportation or non-transportation) one-call center serving your community?

Yes

Name(s):

No

- Search for a 2-1-1 agency in your area at <http://www.211.org/>
- Search for an ADRC agency in your area at <http://www.adrc-tae.org/tiki-index.php?page=ADRCLocator>
- Meet with the individuals running these systems to find out more about the services they provide, the needs they observe through their client calls, and their potential interest in joining your efforts.

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QUESTIONS TO ASK THE EXISTING ONE-CALL SERVICE.

What information and services does your organization provide about transportation, walking, biking, etc.?

Does it provide information and referral only?

Yes No

Does the call center provide any options counseling about transportation services?

Yes No

If so, what knowledge do staff members have about how to use available transportation options?

Can accurate information about primary transportation services be obtained, even if it may take several calls?

Yes No

B. MOBILITY NEEDS INVENTORY

The exercise of identifying available mobility services, how information about those services is obtained, and details on the transportation providers should lead to a common understanding of the community's transportation resources and what they are capable of providing. This will give your team a sense of what is working effectively now and what kind of foundation exists on which to build. The other part of the equation, to which we now turn, is identifying what needs remain unmet. For instance,

- Do agencies report that people have trouble navigating the current system to find transportation options? If so, this may result in people giving up and not making the trip, or it may result in program staff spending time arranging transportation for clients/customers.

The Mobility Assessment Worksheet on page 8 is structured so that client/customer mobility needs for each community-based program can be identified. This information provides a starting point for collaboration and coordination.

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Your working group can help you look at transportation and mobility information needs from the perspectives of:

- Customers;
- Various agencies involved in providing transportation or that require transportation for their clients;
- Funding entities. Each will have a different perspective, and understanding these perspectives is a key to success; and
- Businesses and institutions in the community – e.g., hospitals, major employers.

There will likely be many issues, such as inadequate or complicated access to transportation services, funding reductions, and lack of transit service. There may be agreement on what the goals or challenge areas are, but partners may have different ideas about the priority of addressing each goal.

REVIEW

As you continue to gather information from partners and other stakeholders, your thoughts may already be drawn to a collective picture of what transportation service and information challenges exist, as well as what strengths and opportunities the community has on which to build. The next chapter will continue that thought process, as we discuss addressing priority gap areas.

Engage the Working Group

- What is working well?
- What needs attention?
- What are the priorities for improvement?

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MOBILITY ASSESSMENT WORKSHEET

Agency Name: _____

Address: _____

Contact Name: _____

Telephone: _____

E-mail Address: _____

ELIGIBILITY

Who is eligible for this transportation service?

Gather copies of eligibility forms, document the intake process, and note how eligibility information is maintained.

How is eligibility determined?

Does the eligibility determination cover only transportation or does it extend to other services within a wider program?

_____ Transportation only

_____ Eligibility for all program services

What is the process for becoming eligible for transportation assistance?

Who determines eligibility?

Check when eligibility forms are attached

Where do assessments occur?

Is there functional testing? (e.g., in-person testing on boarding a bus)

_____Yes _____No

If yes, attach a description of the process.

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Agency Name _____

How are eligibility records maintained? If database software is used, list the name of the program.

How is the software updated?

Is the software part of a larger scheduling or billing software package?

____ Yes ____ No

If yes, provide the name of the software:

TRIP SCHEDULING, RESERVATIONS, & DISPATCH

How are trips reserved, scheduled, & dispatched?

What software is used?

What staff is involved at each stage?

Are they dedicated to the task or do they have other duties?

COMMUNICATIONS SYSTEMS

How are trip schedules or other information provided to riders (e.g., by fax, phone, automated phone calls, text messages, emails)?

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SERVICE DELIVERY

Who provides the service?

Agency Name _____

Is it a direct or contract operation?

Does it provide service for any other programs?

Yes No

VEHICLES AND CAPACITY

What vehicles are used? Identify which are accessible.

(You may want to attach a roster)

Are there times when the vehicles are full?

Yes No

Describe:

Are there times when the vehicles have available capacity?

Yes No

Describe:

ORGANIZATIONAL STRUCTURE AND CAPACITY

How is the agency structured? *(Is it a non-profit or part of a governmental organization? Does it have a single purpose or is it multipurpose?)*

How are transportation services organized?)

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What is the primary mission?

What staffing constraints, availability, and skills exist?

NEEDS

What are the primary needs of this program and the agency's clients/customers?

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