

vii. ESTABLISH THE ACTION PLAN

Guide To Beginning ONE CALL–ONE CLICK Transportation Services

You now have a general idea of whether a one call–one click transportation project is right for your community, which services you would like to include, and which are the potential lead agencies. This chapter will assist you to fine-tune your basic concepts

- Refining the functions of the one call–one click service
- Drafting an action plan to take your service to the next level.

Don't be surprised if your concept of a one-call or one-click service evolves as you go through this step. Be open to potential changes. They are a natural part of project development. The objective is to end up with an action plan that has support among a wide range of stakeholders, clearly defines what you plan to do, and identifies a budget and timeline for moving forward.

THE FOUNDATION OF YOUR ACTION PLAN

As you proceed to develop your action plan, the level of detail that you need will be specific to your community and the scope of your project. At each level you may discover new information that impacts the overall plan. Typically you can drill down one or two levels before you find that you are answering questions with, "It depends on the direction we take." At that point, you cannot go further without getting solid answers and a consensus on how to move forward. You need to go only far enough to be able to develop an action plan and obtain necessary resources to move forward. The rest of the questions will be addressed as you implement the action plan.

This discussion assumes you already have a central directory or resource guide identifying all transportation services, with basic in-

formation on what is available, when services operate, how to obtain eligibility, and how to schedule rides. This resource guide can be a hard-copy booklet, pamphlet, spreadsheet, or web page. If you don't have one, developing it will be an initial step. You can use the information developed on transportation resources as your basis.

FUNCTIONS OF YOUR ONE CALL–ONE CLICK PROJECT

In Chapter VI, you identified the basic services and types of information you may wish to include. This section will assist you in refining what those services will look like.

INFORMATION, REFERRAL, AND RESERVATIONS

Basic levels of information you may wish to consider are:

- **Information and Referral.** Assess the callers' needs and identify the services for which they might be eligible. Provide callers with all the information needed to go to the next level for each of these services:
 - o Send them an application form,
 - o Tell them the information they will need to have available when they register, or
 - o Explain the eligibility process.

Callers will independently call providers to register and schedule rides.

- **Information, Eligibility, and Reservations.** Includes all listed above, but one call–one click center makes tentative or confirmed reservations

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- **Information, Referral, and Connect to Providers.** Connect riders to a provider that will meet their immediate travel needs, serving many providers and modes. For new callers, provide information about the services for which they are eligible and will meet their needs. Find a provider that can schedule the needed trip and transfer the caller to the provider to schedule it. This requires read-only access to providers' schedules or a protocol for handling this function smoothly.

In your project, what level of information will be provided to callers?

Will any follow-up be done to determine if callers were able to obtain service?

_____Yes _____No

OPERATING REQUIREMENTS

Refer to the information on technology (telephone systems) and providing quality customer services in **Chapter VIII: Additional Considerations** for more detail on the requirements of running an information and referral service. Consider the skills and organizational requirements necessary for the type of operation and functions that are planned.

What hours do you want your service to operate?

What staff would be required?

What are your options for telephone communications?

ELIGIBILITY

If a joint process for determining eligibility is included in your plan, consider the following common choices among one-call services:

- Callers are pre-screened for **probable** eligibility using age, disability, income, or other threshold characteristics, with definitive eligibility determined by the service provider or third party.
- Callers are screened for **definitive** eligibility immediately using an interactive process completed while the caller remains on the phone.
- Callers are screened for **definitive** eligibility using an application process that is completed off-line.
- A separate functional assessment is required.

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Which agencies are interested in participating in a joint or common eligibility process?

Is a common database desired?

Yes No

Your objective now is to quantify what it will take to establish an eligibility process that meets the needs of the partners. Some areas you may need to explore are:

- Where and how do eligibility determinations presently occur?
- What are similarities and differences in forms and processes?
- Is there income-based or overall program eligibility that will need to be maintained, and how is it presently updated?
- Which programs require a functional assessment?
- Which programs require an appeals process?

The case study for Lane Transit District in the Local Profiles section has a sample flow chart illustrating a joint-eligibility process and a sample functional assessment.

SHARED RESERVATIONS – JOINT SCHEDULING – JOINT DISPATCHING

Your discussions around shared reservations, scheduling and dispatching will build on the resources identified in Chapter IV: Assess

Resources and Needs where you were asked to identify how trips are reserved, scheduled, and dispatched; the software used; and the staff involved at each stage. This detailed information for each of the providers, which might be part of a joint system, will be the foundation for determining how to move forward.

At this stage, you should meet with the transportation providers, including their scheduling staff and information technology (IT) staff, and discuss similarities and differences in your systems. Determine your objectives and what information will be needed to better understand your options and their costs. Identify what you know and what you will need technical experts to address.

As experts in transportation and services, you understand how services need to be delivered. To address options for joint reservations, scheduling, and dispatch you will need to work with vendors and IT staff – the experts in technology. The objective at this point is not to answer the specific questions, but simply to identify the support you will need from professionals and to develop a plan to obtain that information.

OTHER SERVICES

Other services you may want to include:

- Ride-Matching Services. Provide ride-matching services for car-pools or vanpools, coordinating the program and maintaining the database
- Advocate for passenger trip needs or assist passengers in navigating the system to obtain transportation services;
- Travel training, travel orientation, and related services; and
- Emergency Transportation Arrangements. Provide riders with

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“stop-gap” services to meet immediate needs until they can resolve their transportation issues. Stop-gap services may include vouchers for emergency taxi services, volunteer-driver programs, vouchers for gas or car repair, or similar services.

If these are included in your plan, your objective now is to quantify what it will take to implement the services you chose.

- Are there staff already trained as outreach specialists who could expand to transportation services or teach others?
- Is anyone certified as a travel trainer?
- What are the training requirements for each program?
- Are there individuals capable of setting up and overseeing these new programs?
- What is the method for updating information, and how often is it updated?
- How many people would be needed for each program?
- How long would it take to set up a program?
- What funding is available or could be applied for?

STEPS TO THE ONE CALL–ONE CLICK SERVICE YOU CHOOSE

Table VII-1 takes you further in looking in identifying specific steps you may want to take. In the table, these steps are listed in three areas

- coordination of transportation services,
- customer experience, and
- technology.

The functions are spread along a continuum, ranging from information available on a provider-by-provider basis to fully integrated and/or automated information.

Your community may be at different places along the continuum in different areas; for example, you may have made significant strides in coordinating transportation services, but be at a basic, beginning level of providing coordinated transportation information. Or you may have implemented complex billing software but still determine eligibility on an agency-by-agency basis.

Also, the chosen endpoint for your community may never be to have a fully integrated or fully automated service, or that may indeed be your goal. And your partnership can always revisit what your endpoint should be as circumstances within your community change. The important guiding factor is to determine what fits your community best within all the factors that you have identified above.

One caveat: There is a temptation to always want the most powerful technological solution, but that may not always be the best fit for your community. As one individual interviewed for the profiles said, “If you don’t approach technology as a tool that can help the business you are already doing, the business you already know, it can actually get in the way and become a roadblock.”

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Find where you are now, and see what your next steps might be:

Distinct systems_ _ _ _ _Some coordination_ _ _ _ _Fully Integrated_ _ _ _ _Automated

COORDINATED AMONG PROVIDERS										
Providing rides										
Providers work alone	→	Share information on available services among providers	→	Share rides, as need arises	→	Develop shared standards for drivers, operations	→	MOUs for scheduled shared rides, using fully allocated cost	→	One call as broker of all partner rides
Rider eligibility										
Providers implement own eligibility process	→	One call center sends/processes applications	→	Cross-train staff to complete applications for other agencies	→	Establish common eligibility application for rides	→	Incorporate one-stop eligibility process into one call center	→	
Rider reservations										
Providers make reservations directly w/customers	→		→	Provider that needs more capacity calls another provider and schedules a trip on behalf of a customer	→	One-call service makes tentative or confirmed reservations	→	Shared electronic reservation system among 2 or more providers	→	Automated reservation system with provider, agency or customer input
Scheduling and dispatching										
Providers schedule/dispatch only their trips	→		→		→	Establish compatible communication systems for providers	→	Shared scheduling/dispatch from one-call center	→	Computer-aided automated scheduling/dispatch from one-call center
Financial operations										
Providers have separate billing systems for rides	→		→		→	Develop fully allocated cost for trips	→	Centralized billing through one-call center	→	Shared electronic fare system that allocates costs

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CUSTOMER EXPERIENCE										
Information and referral										
Rider calls each provider for information and reservation	→	Paper-based ride guide for all services		One-stop telephone or web-based site for transportation information for all services	→	One-call or one-click access to reservations on all programs, but indiv. providers confirm pick up/drop off times	→	One-call or one-click access to reservations and confirmed pick up/drop off times	→	Customer can request and confirm reservation on line through automated system
Eligibility										
Rider completes eligibility with provider directly	→		→	Rider provides eligibility information one time and it is placed on applications for several programs	→	Customer completes common eligibility application for services	→	One-call center implements pre or full eligibility screening for all partner services	→	
Customer payment (individual or agency)										
Customer pays individual provider at time of ride	→	Payment made to provider through back-office operations	→		→	Agencies develop system for paying each other for shared rides	→	One-call center provides centralized billing for all partner rides	→	Billing of customer ride automated through computer system

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TECHNOLOGY										
Communications w/customers										
Telephone communications	→		→		→	Web-based information and reservations requests	→	Automated customer notification/reminder via e-mail, text message	→	Automated Interactive Voice Response (IVR) telephone system
Driver/dispatch communications										
Single providers communicate w/ their drivers via radio	→		→		→	Compatible radio communications systems among providers for dispatching	→	Digital communications btw. drivers/dispatchers, with automatic vehicle locator (AVL)	→	
Scheduling/dispatching										
Simple paper or electronic spreadsheets for scheduling/dispatching	→		→		→	Computer-aided scheduling and dispatching (CAD)	→	One-call center has read/write access to providers' Web-based scheduling system	→	Fully integrated traveler information system that allows riders to schedule rides across providers via Web interface
Financial operations										
Providers have separate billing systems	→		→		→		→	Shared cost/billing software	→	Shared electronic fare system

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CREATING THE ACTION PLAN

An action plan is the document that guides all your activities. You might present it to potential partners, political leadership, and funding agencies in order to solicit support.

It will reflect the work accomplished to date and the consensus among the partners. It may describe a planned one-call service or the concepts that you will investigate further. It will describe several components briefly, but clearly.

CONTENTS

Your action plan should include a summary of the activities that will be undertaken, with enough details that serve your purposes. As a guide for moving forward as a group, it is useful to have tasks well-defined. And, it is a good idea to prepare a summary document—with emphasis on the description of what the one-call service will do and how the partners will work together—to present to potential partners or lead agencies. Categories to include in your action plan are:

- **A description of the planned one-call service**
 - o Functions
 - o Lead agency and partnerships, including information on how the partners will work together
 - o Anticipated staffing and key equipment
 - o Location
 - o Hours and days of service
- **The steps that will be completed to carry out the plan**
 - o Describe major activities and the time needed to complete each.

- o Identify which will be completed by partner agencies, consultants, and vendors.
- o Describe early-action activities such as what can be accomplished before additional funding is available.

- **Partnerships and building support**

- o What is in place now
- o How you will continue to strengthen and build partnerships among agencies, private and public transportation providers, volunteer-driver programs, businesses, and other stakeholders

- **Financing** preliminary work and implementation of the one-call service

- **A schedule** reflecting:

- o Key activities
- o Deadlines for grant applications and budget approvals

TOOLS

Use basic tools to ensure that your action plan is practical and easy to understand and follow.

- Break tasks down into manageable pieces – items you can check off when completed.
- Assign responsibility for each task to an individual.
- Identify key deadlines such as budget cycles or when a grant application is due. (If these are missed, your plans might be put off for a year.)
- Monitor your progress, keeping your partners informed of what has been completed, what has become more complicated than

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originally thought, and any adjustments that are needed.

Creating charts is a good way to present a lot of information in one place, making it easy for people to stay on track. Charts are also easy to update.

The following page illustrates one sample you might use. You might prefer to show a schedule on a chart that illustrates months so you can easily see how long a task will take and the relationship of one task to another. For some tasks you might prefer a flow chart. Use what works for you!

TABLE VII-2: Sample Action Plan Chart

Activity	Early Action?		Due Date	Completed by
	Yes	No		
Lead agency designation	<input type="checkbox"/>	<input type="checkbox"/>	Mar-12	Jerry - lead
Presentation to ABC board	<input type="checkbox"/>	<input type="checkbox"/>	Sep-12	Jerry
Presentation to XYZ board	<input type="checkbox"/>	<input type="checkbox"/>	Sep-12	Robert
Presentation to AAA Council	<input type="checkbox"/>	<input type="checkbox"/>	Sep-12	Beth
Prepare and sign intergovernmental agreement	<input type="checkbox"/>	<input type="checkbox"/>	Dec-12	ABC's legal; Jerry will support
Establish advisory committee	<input type="checkbox"/>	<input type="checkbox"/>	Mar-12	Jerry, Susan

Prepare grant application	<input type="checkbox"/>	<input type="checkbox"/>	May-12	Nancy
Grant award - estimated	<input type="checkbox"/>	<input type="checkbox"/>	Oct-12	Nancy will monitor
Write scope of work for consultant	<input type="checkbox"/>	<input type="checkbox"/>	Oct-12	Beth will lead. TAC actively involved
Procurement process	<input type="checkbox"/>	<input type="checkbox"/>	Dec-12	Jerry ABC agency

FUNDING

Your action plan should address funding for interim activities and the implementation of planned services. Ideally, this action plan will prepare you to make the case for funding assistance – whether for interim activities or for implementing one-call services.

The survey of one-call centers provided a look at how one-call services are funded (Figure VII-1). Key points are:

- A wide range of funding sources were used;
- Almost two-thirds of agencies used Federal Transit Administration (FTA) or other U.S. DOT funding, along with state or local matching funds; and
- Medicaid Infrastructure Grant (MIG) funds from the Centers for Medicare & Medicaid Services and a variety of charitable or private foundation funds were also used regularly.

Agencies in the survey reported that they developed funding for one-call services one step at a time, building their operation as fund-

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ing was obtained. Many reported that they needed to show the value of their service in order to obtain funding. The value might be in quality of life or livability measures, or it might be in enabling the area to use its resources more efficiently.

Funding realities are often what determine how far and how fast you can proceed. It is important that your action plan reflect these realities.

Funding for interim activities is the most immediate need.

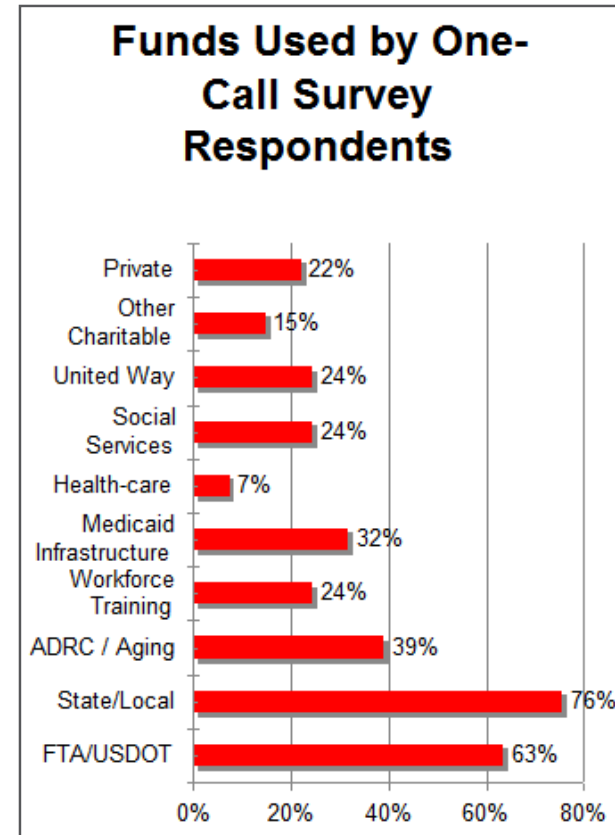
Talk with your partners and state staff from the departments of transportation, health and human services, housing, or other departments to learn what options exist for funding both the interim activities and the actual services. Brainstorm among your partner agencies to:

- Identify how to target existing resources toward meeting your priority objectives,
- Identify potential funding sources that are specific to certain programs, and
- Prepare for any funding opportunities that may arise.

Is there a foundation that might be interested in your project? Could your project be included in a livability or other initiative?

Chapter VIII: Additional Considerations provides supplemental topics to support you in developing and refining your action plan. It includes information on technology, customer service, and marketing and outreach.

FIGURE VII-1: FUNDS USED BY ONE CALL—ONE CLICK SERVICES



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