
Chapter 9 - Checklist for Planning and Operations

This chapter is a summary of the “Basics” that are provided throughout the Guide. The summary can be used as simple outline or checklist to assist those planning to establish or operate a basic center.

I. BASICS – Issues to Consider in Developing a Center

- 1. Geographic area*
- 2. Lead Organization*
- 3. Partners and Commitment*
- 4. Audiences to be Served and Need*
- 5. Resources (Funding and other resources)*
- 6. Scope*
- 7. Person-centered focus*

II. Planning Steps

- 1. Determine lead organization*
- 2. Identify partners*
- 3. Determine audience Center will serve and what the Center will do*
- 4. Assess needs and gaps in service*
- 5. Collaborate in deciding what each partner will do*
- 6. Communicate regularly*
- 7. Draft a plan for how the Center will be implemented*
- 8. Draft an operational plan with budget*
- 9. Include Quality Control Procedures in all phases of the planning*

III. Implementation Planning

- 1. Goals and Objectives*
- 2. Implementation costs*
- 3. Resources Required – Facilities, Hardware, Software and Staff*
- 4. Major Tasks and Timeline*
- 5. Training*
- 6. Quality Assurance*
- 7. Piloting and Testing*
- 8. Documentation*

9. *Evaluation Methods*

IV. *Quality Management*

1. *Quality goals for staff and customer experience*
2. *Performance measures for staff monitored on on-going basis*
3. *Customer goals evaluated based upon the customer's experience*
4. *Feedback from performance measures should result in on-going staff training and review of processes*

V. *Standards and Protocols*

1. *Standards describe the quality of service the customer is expected to receive as a result of the service being provided.*
2. *Protocols describe the processes and procedures that will be followed to deliver the services to the customer*

VI. *Staff Performance Protocols*

1. *Professional conduct and courtesy*
2. *Privacy, security, and HIPAA compliance, if applicable*
3. *Resources*
4. *Adequate staff to provide access to services for people with all abilities*
5. *Script for different types of calls*
6. *Conversation Protocols*
7. *Difficult callers and complaints*
8. *Crisis Protocols*
9. *Gaps in service*

VII. *Staff Management*

1. *Staff Management Plan*
2. *Adequate staff to handle existing and projected volume*
3. *Call Center Manager*
4. *Hiring*
5. *Initial Training*
6. *On-going training*
7. *Performance Evaluation*
8. *What is Mobility Management*

Mobility management is assisting transportation-challenged populations -- youth, people with disabilities, older people and people with low incomes -- to get where they need to go so they can live fruitful lives in their communities.

Partnership for Mobility Management

<http://web1.ctaa.org/webmodules/webarticles/anviewer.asp?a=3007&z=95>

VIII. Quality Assurance System

1. *Written Plan*
2. *Involvement of senior management*
3. *Different activities/tools to measure performance at different times and points*
4. *Assess staff performance against standards and protocols*
5. *Evaluate customer satisfaction*
6. *Independent of staff performing functions*

IX. Resource Management

1. *Resource Management Plan*
2. *Can include both staff and information resources or can be separate plans*
3. *Assign staff responsible for maintaining resources*
4. *Procedures for updating resources*
5. *Procedures for inclusion and exclusion of resources*

X. Reporting

1. *Number of calls*
2. *Caller Information (depending upon center functions)*
3. *Demographics*
4. *Call Type*
5. *Purpose of call*
6. *Disposition of call*
7. *Quality assurance*
8. *How learned about service*

XI. Outreach and Marketing

1. *Written Plan*
2. *Involve Partners/Collaborators*
3. *Identify and learn about target population*
4. *Budget for activities*
5. *Evaluate effectiveness of activities*

