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 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
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