REGIONAL ONE-STOP CALL CENTER

IMPLEMENTATION REPORT AND PLAN

TxDOT PGA #51210F7129

PREPARED FOR EASTEXCONNECTS

OCTOBER 2012

moore
& associates

Introduction

The East Texas Council of Governments (ETCOG) was approved by the Texas Department of Transportation (TxDOT) for funding in December 2011 to conduct a series of regionally coordinated planning activities in support of a One-Stop Regional Transportation Call Center (Call Center), from theoretical concept to an actual "blueprint." This is the final report intended to present the "blueprint" for implementation of the Call Center. The plan's goal is to summarize the past efforts detailed in the five technical reports and present them in a unified and concise manner.

The first section of this document briefly summarizes recent efforts in the East Texas region to develop the Call Center. The report will then review case studies that pertain to the creation and sustainment of call centers in various regions. The following sections will report findings from the Community Transportation Association of America (CTAA), which surveyed a variety of organizations regarding different aspects of existing call centers, and other national resources, as well as reflect input from stakeholders in East Texas. The last section formulates recommendations for each of the four categories in call center development: role and function, administrative organization, operations, and funding.

SECTION 1: RECENT EFFORTS

Background

The 14-county ETCOG region encompasses some 9,720 square miles of land and, according to the 2010 Census, is home to 829,749 residents. The two largest cities are Tyler (population 96,900) and Longview (population 80,455). Two public transportation providers offer both fixed-route and demand-response services (Longview Transit and Tyler Transit). There is also Amtrak passenger train service in three East Texas communities (Mineola, Longview, and Marshall). Other providers – GoBus, NDMJ, Inc., and East Texas Support Services, Inc. (American Medical Response) – offer demand-response or non-emergency medical transportation (NEMT).

Call Center History

In the fall of 2006, public forums were held as part of the development of the 2006 Regional Transportation Coordination Plan (RTCP) for the East Texas region, which identified a set of concrete activities to implement. One of the fifteen projects was the design, construction, and implementation of a centralized call center, paratransit dispatching, customer information line, and/or phone-routing system. The RTCP was updated in 2011 through additional public forums, surveys, and interviews with transportation stakeholders. The 2011 RTCP identified twenty strategies or projects while also confirming the continued relevance of several of the recommendations presented within the 2006 RTCP, including a Regional One-Stop Call Center.

The 2011 RTCP process was managed by the East Texas Regional Transportation Coordination Planning Steering Committee (renamed EasTexConnects in Spring 2012). The Steering Committee is made up of representatives from every rural and urban public transit operator, each MPO, the local Workforce Development Board, Health and Human Services operators, local private-for-hire transportation providers, transportation advocates, air or over-the-road transportation providers, the Texas Department of Transportation, County Commissioners from each county, and the lead agency.

Unanimously adopted by the Steering Committee, the 2011 RTCP offers guidance for regional mobility across the next ten years, including approved recommendations for targeted outreach, training programs, and a centralized call center.

Each public transportation provider in the region – Longview Transit, Tyler Transit, and GoBus, as well as private provider NDMJ – has its own call and dispatch centers featuring stand-alone customer information phone numbers. In late 2010, Smith County and the North East Texas Regional Mobility Authority (NET RMA) submitted a grant application to TxDOT to pursue the Smith County Multi-Modal/Coordinated Traveler Management System (CTMS) project. This TxDOT-funded pilot project proposed to "implement a localized CTMS which includes a variety of services tailored to meet the needs of diverse riders seeking and needing access to services, commerce, recreation, faith-based, and social activities as well as employment." NDMJ believes development of the CTMS has led to a coordinated service delivery network (defined as increasing connectivity for customers and efficiency for providers). ETCOG was subsequently appointed as the responsible party for the CTMS component of that project. In early 2012, NDMJ approved ETCOG's applying for a Veterans Transportation and Community Living Initiative (VTCLI) Grant, which was awarded in 2012, to provide additional Call Center funding. This grant also named ETCOG as the lead agency.

While NDMJ wishes to continue to establish a localized (Smith County) CTMS that may include a call center, ETCOG is committed to a more regional focus (i.e., the 14-county area) in its pursuit of the proposed One-Stop Call Center. This study and report are intended to offer guidance as to the role and function of the Call Center, whether implemented as a stand-alone regional project or incorporated into the Smith County Multi-Modal Facility and CTMS.

ETCOG, as lead agency for regional planning and the designated "responsible partner" for the CTMS, secured funding to determine feasibility for and organization of the recommended Call Center through the Texas Department of Transportation (TxDOT) Supplemental Call for Projects in December 2011. Once completed, this "blueprint" will support the design, implementation, cost forecasting, and location of the potential center.

Stakeholder Consensus
As the lead agency regarding the CTMS, ETCOG felt it in the region's best interest to pursue grant funding during TxDOT's Supplemental Call for Projects. Due to the quick turnaround time for grant submittal, there was no opportunity to present the grant application to the EasTexConnects Steering Committee for review and approval, as it was between regularly scheduled meetings. Letters of support were obtained from public transit operators Longview Transit and Tyler Transit.

Subsequent to grant award, all deliverables have been presented to the Steering Committee at regularly scheduled meetings for review, discussion, and approval. Technical memos one through three were presented on March 21, 2012, while technical memos four and five were presented on May 16, 2012. The final draft report was presented to the Steering Committee on July 25, 2012. At each of these meetings the general consensus among participants was that the deliverables were on target.

In July 2012, the North East Texas Regional Mobility Authority (NET RMA) was invited to seat a representative on the Steering Committee (which it did at the Steering Committee's next meeting in September 2012) and was asked to review all project deliverables. No revisions were requested.

SECTION 2: CASE STUDIES[1]

It is necessary to review existing call centers in order to create a strong plan of implementation. Doing so will showcase the best features and strategies from different organizations which could be replicated in the East Texas region. Seven organizations are discussed below with examples of their role, organization, use of equipment and technology, and sources of funding with respect to call center development. Not all case studies address all four categories.

Purchase Area Regional Transit (Kentucky)
The Purchase area encompasses 2,569 square miles spanning eight mostly rural counties (Ballard, Calloway, Carlisle, Fulton, Graves, Hickman, Marshall and McCracken) in western Kentucky. The area's population is 196,363 according to Census 2010, including 26,307 residents in the region's largest city, Paducah.

Role and Function
The Paducah Area Transit System (PATS) and three rural transit systems (Murray-Calloway Transit Authority, Fulton County Transit Authority, and Easter Seals) jointly formed a new non-profit organization, Purchase Area Regional Transit (PART), to operate its Transportation Management Coordination Center (TMCC). The TMCC, which includes a transportation one-call service function, opened in March 2010 with a mission to "provide customers with a single point of access to receive regional transportation, human services and community information facilitating greater personal mobility for all individuals in the Purchase Area region."

The goals that define the center's role and function include providing a place, phone numbers, and website where people can get information about services, bus passes and vouchers. The center also assists customers in learning how to be eligible for paratransit services, offers a source for travel training and travel orientation, and provides customers the ability to schedule rides and check on ride status via the internet and telephone. Information is available for all public transit providers, paratransit, specialized transportation services, human service transportation programs, and privately operated transportation services including taxis.

Administrative and Organizational Structure
PATS, the largest of the service providers (with 67 vehicles), hosts the call center. PATS received a federal grant to expand its existing administrative facility to accommodate the TMCC's operations and technology systems. The call center also serves walk-in customers. There are plans for additional office space to accommodate staff of partnering human service and community organizations.

Equipment and Technology
PART uses an Iwatsu business telephone system with a total of 23 incoming lines, including 12 lines that were added as part of the TMCC project. The system supports English as well as other language options, and includes a TTD/TTY for callers with hearing impairments, along with 2-1-1 call forwarding and fax. The phone system also has integrated voice response (IVR) capability available at all times that enable callers to obtain information and direct their calls using a phone tree directory. The phone system is internet-accessible using Voice over internet Protocol (VoIP) technology. Additionally, PATS acquired a telephone call accounting software product called TAP-IT at a cost of approximately $2,400.

---

[1] Many of the case studies cited here are summaries of research developed by the Community Transportation Association of America (CTAA).

The TMCC has implemented an integrated scheduling and dispatching system using RouteMatch scheduling software, AVL, and in-vehicle mobile data computers (MDC) supplied by Mentor Engineering. These systems provide customers with internet and telephone access to their reservations and booked trips via password-protected client accounts and support dissemination of day-of-travel information such as vehicle arrival status and notification, schedule changes, and service disruptions via cell phone text messaging and email.

PART also purchased six information kiosks to facilitate remote access to the RidePART website from selected high visibility locations in the service area. Four have been installed to date, including one at PATS' administrative facility, one at the Visitors Bureau in Paducah, and two on the Murray State University campus located approximately 50 miles south of Paducah in Murray, KY. Two others will be installed at locations yet to be determined.

Funding
On behalf of all four members, PATS applied for a Demonstration of Enhanced Services Transportation Models grant from the Mobility Services for All Americans (MSAA) Initiative in 2006. The United States Department of Transportation (USDOT) awarded a Phase 1 System Development and Design grant the same year and a Phase 2 System Deployment Grant for more than $1.4 million in 2008.

These federal dollars were for the deployment of the regional TMCC and were matched by the Commonwealth of Kentucky Toll Credits as well as in-kind funding through human service agency contracts and other general fund revenues. Additionally, PATS received $2 million from the Federal Transit Administration (FTA) Section 5309 Bus and Bus Facilities discretionary grant for facility expansion and customer service consolidation.

CT RideNet (Minnesota)
Located in St. Cloud, MN, CT RideNet is a non-profit corporation operated as a public service by Care Transportation Inc. St. Cloud has extensive fixed-route bus and demand-response services, as well as connections with the North Star Link to the Twin Cities. Kandiyohi Area Transit serves Willmar with fixed-route transit and a variety of small towns with senior services.

Role and Function
CT RideNet is an example of a one-call service that has forged strong ties to private sector providers Yellow Cab and Care Cab; Kandiyohi Area Transit; Sherburne and Hennepin counties; as well as a variety of sponsors to address the need for transportation services operating out of rural areas.

Equipment and Technology
Care Transportation has implemented proprietary software to track reservations, clients, vendors, and financial functions, while its call center handles more than a half million calls annually. The toll-free number is available for all transportation requests 24 hours a day, 7 days a week through the taxi dispatch system. Additionally there is a web application that can be used in lieu of the toll-free number that accepts reservations and offers information.

Lower Savannah Council of Governments (South Carolina)
The Lower Savannah Council of Governments (LSCOG), which is also a Transportation Management Coordination Center (TMCC), developed a one-call center as part of an initiative to coordinate a human service agency with transportation resources. The Lower Savannah

Region is composed of six counties – Aiken, Allendale, Bamberg, Barnwell, Calhoun, and Orangeburg – and covers 3,981 square miles including a population of 316,802 (Census 2010).

Role and Function
This one-call/one-click center primarily serves as a foundation of information, referral, and customer assistance. It also has developed a system to manage available seats on existing human resource demand-response services to the general public.

Administrative and Organizational Structure
The one-call/one-click center is operated by LSCOG, which merged its ADRC with its transportation, mobility management, and coordination functions. The Center's title, the Lower Savannah Aging, Disability and Transportation Resource Center (ADTRC), draws upon its strong human service agency perspective.

ADTRC's organization structure is unique in that LSCOG itself is not a direct transportation provider, but rather coordinates the services of several human service and public transit providers. This has its advantages given LSCOG has been able foster an image of impartiality among its service providers, the majority of whom are human services organizations.

The Center is housed at the LSCOG regional offices and was realized as an expansion of the existing facility.

Equipment and Technology
LSCOG utilizes RouteMatch software and has worked closely with the vendor, from concept to implementation. This application database is used to provide, track, and report on demand-response transportation services throughout the region. There is a transportation web portal, IVR integration, and a coordination module. Additionally, Computer-Aided Dispatch/Automatic Vehicle Locators will provide real-time tracking and schedule adherence for the fixed-route transit service in Aiken County.

The new telephone system enables the TMCC to function as the one-call service for consumers to access transportation and human service information and referral services. This VoIP technology reports call center statistical data and has the capacity to connect among partner agencies in the region in the future. It also supports the IVR system in making outbound calls for appointment reminders the day before, same day ("Your bus will arrive in ten minutes") or weather emergency information. Customers will also have the option to cancel or confirm scheduled trips during the reminder calls. This is expected to enhance customer service and reduce the incidence of patron "no shows."

AVL technology and mobile data computers (MDC) are installed in both the demand-response and fixed-route vehicles providing services for the TMCC. This allows the TMCC to view in "real time" the status and location of the vehicles, and dispatchers can communicate trip information electronically to the driver. Drivers utilize the devices installed in the vehicle to electronically submit reports of when trips are performed, cancelled at the scene, and when the consumer does not show up for the scheduled trip. This technology is capable of supporting the expansion of same-day service and utilization of the closest, most appropriate, vehicles, thereby further increasing efficiency and decreasing costs.

Funding
In 2000, the South Carolina Department of Transportation and the South Carolina Department of Health and Human Services funded a transportation coordination demonstration project – the

Regional Transportation Management Association (RTMA) – through LSCOG with FTA Section 5310 Elderly Persons and Persons with Disabilities funding.

Partnering with the South Carolina Lieutenant Governor's Office on Aging, LSCOG was able to obtain a Systems Transformation Grant from CMS, which was used to implement and provide matching funds for the TMCC in 2005. Like in Paducah, USDOT's MSAA Initiative awarded LSCOG a grant to develop the call center in 2006. LSCOG maintains sustainability by using benefits-management funds as a FTA grant match.

Dane County (Wisconsin)
Dane County has a population of more than 488,000 and covers 1,238 square miles. Madison, the state's second largest city with a population 232,000 over an urbanized area of approximately 84 square miles, is a partner in the call center.

Role and Function
The Dane County call center offers a single phone number for all public transit providers in the county as well as coordinated information for paratransit services provided by the Dane County Department of Human Services and private providers like shared-ride taxi programs. The center has consolidated eligibility for several paratransit services, with a generic application and one staff member who determines eligibility and the level of subsidy.

Funding
The call center has also obtained a New Freedom grant through the Wisconsin Department of Transportation to support mobility management and provide travel training. It also manages a transit transfer center to support riders with disabilities. Volunteers help people make connections and supervise transfers.

Steuben County (New York)
Steuben County is a predominately rural county in upstate New York covering 1,404 square miles. Based on Census 2010, the county's population was 98,990 with no individual city having more than 15,000 residents.

Administrative and Organizational Structure
In 2009, the Steuben County Transportation Advisory Committee was formed to oversee better integration of public transportation and Non-Emergency Medical Transportation (NEMT) services using a mobility management approach. It created the Steuben Coordinated Transportation (SCT) Project and selected a lead agency, the Institute for Human Services (IHS). IHS is a non-profit organization providing management support services, information, and referral through several avenues, including a toll-free 2-1-1 regional one-call information line for social services.
It is through 2-1-1 that transportation-related questions are routed to a dedicated Mobility Manager. The Mobility Manager provides information and referral services to customers. Additionally, IHS is charged with coordinating services and planning among Steuben County's various public, private, and volunteer transportation programs as well as maintaining, hosting, and administrating the scheduling software accessed by individual transit providers from their respective locations.

Equipment and Technology
This administrative structure was selected given IHS's reputation for neutrality. Additionally, 2-1-1 was already well-branded as a one-call number for information services. Moreover, the

organization's board of directors represents a wide cross-section of local organizations and local governments, including a number of transportation stakeholders.

Given it already operated a call center, IHS was determined to be uniquely positioned to easily provide the software and IT support necessary, which positioned IHS above opening a new facility elsewhere.

Funding
Following IHS becoming a FTA sub-grantee in 2009, the New York State Department of Transportation awarded a FTA Section 5316/5317 Job Access and Reverse Commute/New Freedom (JARC/NF) grant to IHS to begin call center development and coordination. Specifically, 80 percent of the JARC/NF award was used to acquire software in a continuing competitive procurement process with the remaining 20 percent coming from local sources.

Tri-County Community Action Program (New Hampshire)
The North Country region in New Hampshire contains 51 communities and 25 unincorporated places in three rural counties – Carroll, Coos, and Grafton – near the Canadian border. To serve this area of 85,000 residents spread over 3,418 miles, the Tri-County Action Program (TCCAP), which is a private, not-for-profit social service agency, operates North Country Transit (NCT), and provides one-call transportation service.

Funding
To support its coordinated transportation program, TCCAP uses a variety of funding sources. Federal funds include FTA Section 5311 Formula Grant for Other than Urbanized Areas, FTA Section 5310 Elderly Persons and Persons with Disabilities, JARC/NF, Temporary Aid for Needy Families (TANF) employment and training grants, and Older Americans Act funds channeled through the State Office for Aging. Other funding sources include state transit assistance, development disabilities program revenue, and charitable contributions like those from the United Way.

TANF funds were used to match the JARC/NF-funded projects, while Medicaid reimbursement was utilized for a volunteer NEMT program.

Manitowoc County (Wisconsin)
Manitowoc County is mostly rural, encompassing 592 square miles with a population of 81,442. The county's two largest population centers are Manitowoc (population 33,736) and Two Rivers (population 11,712). The City of Manitowoc operates Maritime Metro Transit, serving Manitowoc and Two Rivers on six routes, either hourly or half-hourly. Paratransit service is provided by the county's ADRC under a contract with Assist to Transport, a private firm.

Role and Function
In addition to the ADRC, Manitowoc County operates three transit programs: a rural curb-to-curb service for persons with disabilities, a curb-to-curb for seniors (through a contract with Assist to Transport), and a volunteer-driver program. The volunteer driver program is primarily intended for individuals needing transportation to locations outside Manitowoc County.

Administrative and Organizational Structure
The manager of Maritime Metro Transit and the Aging and Disability Resource Center (ADRC) director worked out the arrangements for sharing a Mobility Manager. The County agreed to house and be the employer of record for the Mobility Manager, who received training from both the ADRC director and the Maritime Metro Transit manager. Additionally, the City agreed to dedicate one of its clerks to operating phones for the center.

SECTION 3: CALL CENTER FUNCTIONS AND ROLE

There are numerous one-call/one-click centers currently operating throughout the United States. These centers differ in budget, size, and scope, and their roles and functions vary from community to community. Some centers focus solely on transportation, while others partner with human services organizations to provide information on various social services.

The CTAA conducted a survey of 61 one-call/one-click centers throughout the country. Respondents were asked to identify the types of programs and services their organizations provide. The most common services provided were "Public Transit, ADA paratransit, or specialized transportation services," "Aging and Disability Support Services," and "Temporary Aid to Families and Individuals," which are offered by 31 of the responding agencies. The most common number of services offered was one, while some offered up to seven.

When additional services are offered, call centers typically partner with an ADRC. Within the realm of transportation services, a call center can have different roles and serve different functions. The CTAA has outlined several services the proposed Call Center might consider providing, which are detailed in Exhibit 1.

Exhibit 1. One-call/one-click functions

Function	Characteristics and Options	Benefits
Information and Referral	• Refer customers to proper service • Provide counseling to determine the services that are the best fit • Provide general information on services and eligibility • Transfer calls to a service provider	• Provides the foundation with more coordination • Makes it easier for customers and staff to identify services
Eligibility Determinations for Multiple Programs	• Staff has forms for all programs and completes them at one time • A single process (or limited number of processes) for determining eligibility for multiple programs • Share data on eligibility with multiple providers • Maintain a common database used by several providers	• For the customer, the process for obtaining eligibility for a range of transportation services is simplified • Provides an opportunity for stakeholders to practice working together
Ombudsperson	• May be the responsibility of a mobility manager • Becomes especially important when eligibility is determined	• Helps customers navigate the system and complete trips • Promotes coordination • Helps agencies understand places where the systems are not working as intended
Travel Training	• Helps paratransit riders learn to use fixed-route services	• Transfers eligible riders with disabilities to fixed-route service, freeing up capacity for specialized transportation
Travel Orientation	• "Bus Buddies" (experienced riders) or other community members (e.g., transportation coordinators, mobility managers, social services agency staff) who can show new riders how to use services	• Helps riders learn about and feel comfortable using fixed-route and other travel modes
Travel Hosts	• Assist passengers in finding their transfer connections at busy transfer points	• Enables passengers to make connections more easily
Shared Reservations	• Can use a software application that runs on a closed network or is web-based • Read-only: call-taker can see where space is available, but cannot actually schedule trips • Read/Write: call-taker can see where space is available and can schedule trips • Dispatching is through a single provider	• Improves customer experience and operator efficiencies • Enables callers to know whether they have a trip scheduled
Joint Scheduling	• More people in a vehicle • Uses multiple providers • Once trip is dispatched, the rider's contact is with the provider	• Improves efficiency • Enhances mobility
Joint Dispatching	• Puts more vehicles under a single dispatcher to minimize customer inconvenience due to traffic delays and vehicle breakdowns • Joint dispatcher acts as point of contact for whole trip	• Maximizes vehicle productivity • Operational efficiencies through real-time trip-management information

Source: Community Transportation Association of America,
"One Call- One Click Transportation Services Toolkit."

Stakeholder Input

The Call Center emerged as a priority through the Steering Committee's direct communications with, and feedback from, the public, including 11 public forums, stakeholder surveys distributed to 375 organizations, and one-on-one interviews with each of the region's core transportation providers (Amtrak, GoBus, Longview Transit, NDMJ, and Tyler Transit). This outreach was done as part of the East Texas Regional Transportation Coordination Plan (RTCP) 2011 Update.

The RTCP 2011 Update and the findings from the outreach contained therein, along with discussions in subsequent meetings, represent valuable resources regarding the development of the proposed Call Center. These findings and discussions formed the basis of the research conducted during this phase of the study to determine potential Call Center roles and functions. Given key needs were defined through prior efforts, we were able to target our case studies and subsequent recommendations to those that best matched the specific needs of East Texas.

- **Improving User Experience of Information Gathering and Trip Planning**
  Perhaps the most pressing unmet need arising from the community survey was a lack of general knowledge about public transportation options and difficulty in quickly acquiring information. Prospective users might not know which transportation services would meet their needs, and under the existing system they may have to call several numbers to find the proper service provider.

  This problem is not limited to non-users, however. Problems acquiring information can also arise for those who are familiar with one operator but want to plan a trip requiring multiple operators (which currently also requires calls to each individual operator).

- **Meet the Needs of Mobility-Disadvantaged Populations**
  Analysis performed in the RTCP 2011 Update revealed when compared with other Texas regions, East Texas has a higher-than-average percentage of mobility-disadvantaged populations, including senior adults (age 65 and older) and persons with disabilities.

  The Steering Committee demonstrated its commitment to better serve these populations throughout the plan and noted it a specific priority in Strategy 8, titled "Adhere to needs of growing senior population." The Steering Committee has also expressed a goal of increasing travel training for mobility-disadvantaged persons throughout the 14-county region.

- **Coordinate and Organize Systems on a Region-Wide Scale**
  ETCOG, Longview Transit, NDMJ, Tyler Transit, and Amtrak have all demonstrated a desire to coordinate services on some level. Possible Call Center services discussed in the RTCP 2011 Update include an online regional transit trip planner and eventual coordination of scheduling, dispatching, and data management.

Subsequent Stakeholder Input

Stakeholders were invited to review all recommendations presented herein at the March 21, 2012 and July 25, 2012 Steering Committee meetings and via email. All Steering Committee members as well as the North East Texas Regional Mobility Authority (NET RMA) (which did not have a seated representative on the Steering Committee at that time) were invited to provide their comments.

SECTION 4: CALL CENTER ADMINISTRATION AND ORGANIZATION

According to the CTAA, there are multiple ways to organize a call center's administrative structure. In surveying 61 one-call/one-click centers, CTAA found that the most common operational model (30.4 percent) is as "part of a larger not-for-profit agency." Call centers operated by a public transit agency are the second most common (19.6 percent). Regional planning agencies – similar to ETCOG – operate about nine percent of the centers surveyed.

Exhibit 2. Primary organizational setting for one-call/one-click services
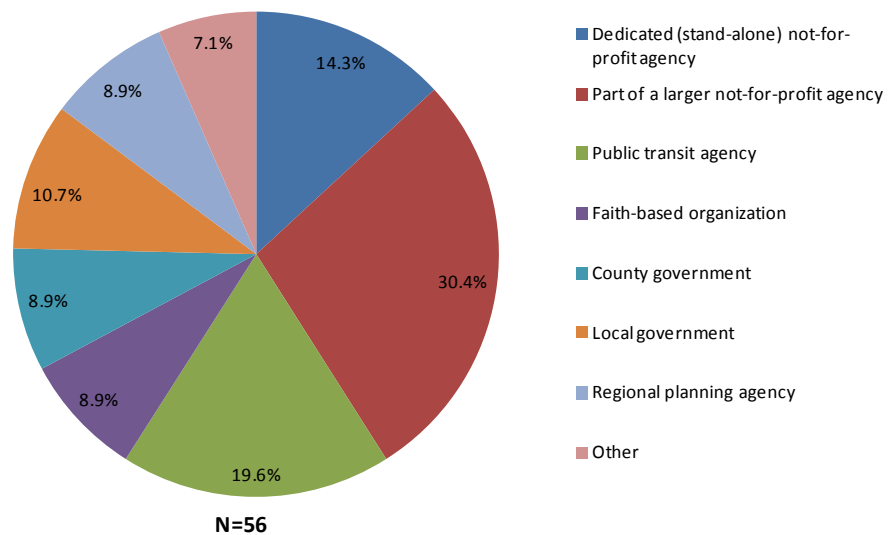
N=56

Source: Community Transportation Association of America,
"One Call-One Click Transportation Services Toolkit."

As for the physical location of administrative and customer service staff, 49 percent of call centers surveyed have staff working in a centrally located office, while 18 percent have staff working in a participating service provider's facility.

CTAA reached the conclusion that "no one institutional home or organizational model was identified as being required to achieve success" and that examples of all types have been successful.

Although the primary location and housing of the center are important elements, there are several other organizational roles to consider. Exhibit 3 illustrates participation by type of agency.

Exhibit 3. Participation in roles by agency type

	Founder/ Organizer	Administration and Management	Policy/governing board member	Transportation service Provider	Broker/ Mobility manager	Source of funding	Advocacy/ political support
Transit	12	11	10	12	7	10	8
Other	7	7	5	2	3	1	3
COG/MPO	2	3	2	3	2	1	1
Council on Aging	3	5	1	4	3	1	2
Community Action Agency	2	2	2	3	1	3	2
Disability Services Org.	3	3	1	1	2	0	1
City/County	1	1	0	1	2	0	0
Workforce	1	1	1	0	1	0	0

Source: Community Transportation Association of America, "One Call-One Click Transportation Services Toolkit."

Transit agencies are the most common organizations participating in one-call/one-click centers, but a variety of other organizations participate at some level. The chart also illustrates that when Council of Governments (COGs) or Metropolitan Planning Organizations (MPOs) do get involved (indicated by three participants), they have taken on the role of broker/mobility manager twice, whereas transit providers have only assumed that role in seven of the twelve occurrences.

Stakeholder Input

Since 2006, the development of a Call Center has been a priority of the Steering Committee. As members of the Steering Committee, designees from ETCOG, Longview Transit, Tyler Transit, NDMJ, and Amtrak have continued to support the development of such a resource.

Regional Call Center Administration and Management

As the lead agency for the Steering Committee, ETCOG has expressed interest in assuming the lead role in the proposed Call Center. As previously mentioned, ETCOG was named in a Memorandum of Understanding (MOU)[2] with other entities for the advancement of the Smith County Multi-Modal Center that includes the CTMS and a call center, and was given the lead for the advancement of the CTMS. As a regional entity covering all 14 counties, ETCOG is well-positioned to assume the prominent role in the administration and operation of the proposed Call Center. This is very much in line with the practices observed in the case studies presented in the previous section.

Partnership Roles

There are two types of partnership roles that should be considered. Aside from the lead agency, "supporting partners" would both contribute to (whether operationally and/or financially) and benefit from their participation in the Call Center. An example would be the City of Longview, which might provide some level of funding of the Center but would also realize the benefits of centralized customer service through improved communications, consolidation of some staff positions, etc. Another example of a supporting partner would be any organization that commits funding to the Call Center, whether through direct financial support or as a key recipient for grant funding not available to transportation entities alone. "Limited partners" – which could include social service organizations, non-profit or private transportation providers, and community organizations – would have minimal contribution to the Center (e.g.,

---

[2] Though drafted, this MOU was never fully executed by all parties.

dissemination of transit information) and would reap modest benefits (e.g., promotion of their services to transit customers as appropriate). As the Call Center develops, it is likely that "limited partners" could take on additional roles (possibly via eligibility for funding sources not typically available to transit organizations) through travel training programs, integration of programs for seniors, and/or centralized reservations/dispatching for regional social services transportation programs.

Subsequent Stakeholder Input
Stakeholders were invited to review all recommendations presented herein at the March 21, 2012 and July 25, 2012 Steering Committee meetings and via email. All Steering Committee members as well as the North East Texas Regional Mobility Authority (NET RMA) (which did not have a seated representative on the Steering Committee at that time) were invited to provide their comments.

SECTION 5: CALL CENTER OPERATIONAL CONSIDERATIONS

Consolidating Call Center operations requires examination of staffing levels, hours of operation, and equipment/technology currently in place in similar call center environments. The CTAA conducted a survey of technologies in use (or being implemented) by organizations across the country. Among fifty-four respondents, many are using an online component that supplements an IVR telephone system, real-time vehicle location system (AVL), or other type of advanced technology. There also are a number of organizations not formally using any technology. See Exhibit 4.

Exhibit 4. Use of advanced technologies in call centers
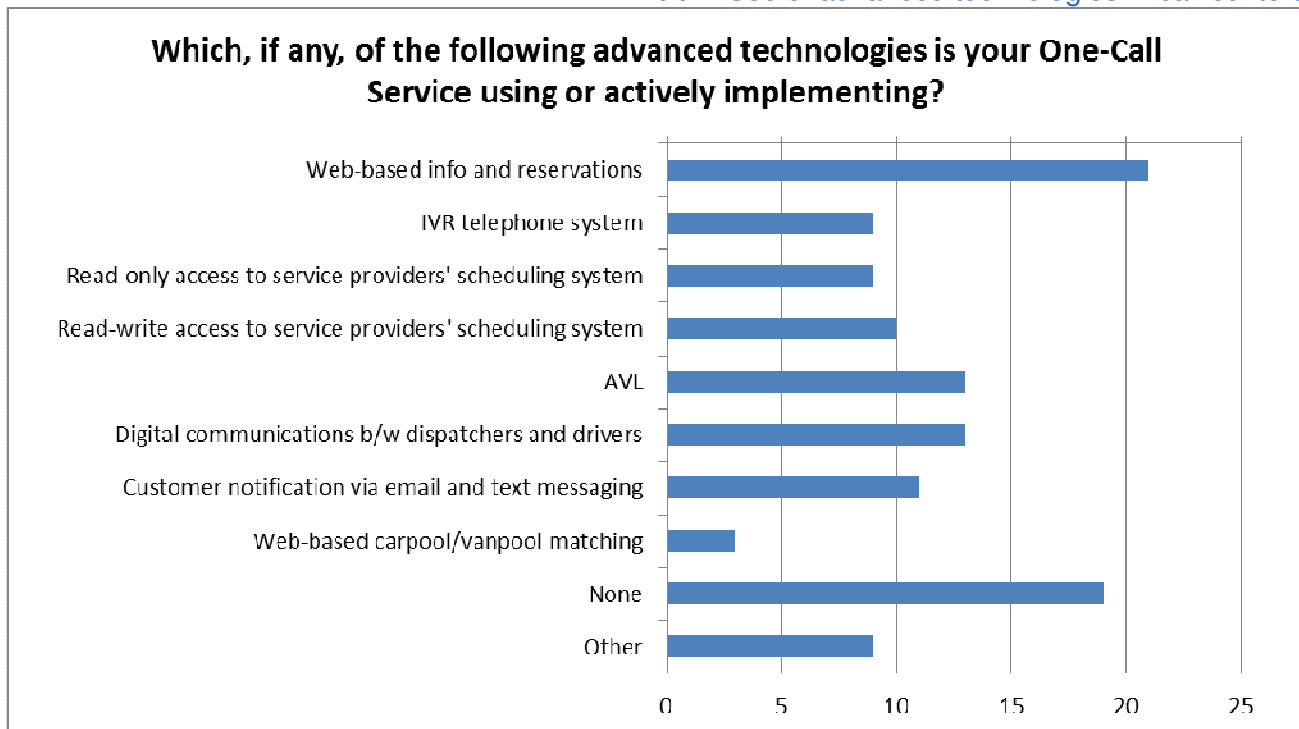
Source: Community Transportation Association of America, "One Call-One Click Transportation Services Toolkit."

With respect to those that marked "Other," the following responses were given:

- Automated call distributer (ACD).
- Common scheduling and dispatching software linked to the technologies above through a national demonstration project.
- "Flood gate" messaging.
- Office landlines and cell phone to/from driver.
- Organizational call center software package.
- Scheduling software (RouteMatch) to help with coordination of trips and producing reports.
- Technology-based services contracted out to the Council on Aging.

Stakeholder Input
The transportation entities are headquartered at several locations in the East Texas region: Amtrak and Longview Transit are in Longview, ETCOG/GoBus is in Kilgore, and Tyler Transit and NDMJ are in Tyler. Kilgore is located between the other two cities approximately six miles from Longview and twenty-one miles from Tyler. An agreed-upon resolution by the stakeholders at the March 21, 2012 Steering Committee meeting directed the East Texas Rural Planning Organization (RPO), whose policy board is comprised of county judges or commissioners appointed by the commissioner's court from each of the fourteen counties, the mayors of Longview and Tyler, and the district engineer from each of the three TxDOT Districts, to ultimately determine the location of the call center.

Call Center Operations
According to provider surveys, there are variations among the three transit operator call centers in the East Texas region. The largest operator – GoBus – fields 30,000 calls per month, which is the most out of the three, utilizing a staff of four employees. Longview Transit handles the fewest calls (900 per month) with only one employee, whereas Tyler Transit has six employees and 1,500 calls per month. Other details are shown in Exhibit 5.

Exhibit 5. Existing call center operations in East Texas region

	Calls / Month	Employees	Hours of Operations	Call Logging Process
GoBus	30,000	4	M-F: 6a-7p	Software based
Longview Transit	900	1	M-Sa: 6:15a-7p	Software based
Tyler Transit	1,500	6	M-F: 8a-5p	Paper logs
Total	32,400	11	M-Sa: 6a-7p	--

Source: Transportation-provider surveys

Hours of operation are generally similar between all three organizations, with slight variations: Longview Transit's call center is open on Saturdays and Tyler Transit is only open from 8:00 a.m. to 5:00 p.m. GoBus and Longview Transit use different software packages for logging calls whereas Tyler Transit staff utilize pen and paper.

Technology
GoBus, Longview Transit, and Tyler Transit currently use RouteMatch for their dispatching activities, while NDMJ recently began using TranAir. Not all of the RouteMatch software versions are the same: GoBus is on the latest version (5.3.23), Longview is currently upgrading

to the Cloud Version, and Tyler Transit uses RouteMatch TS (version 3.1.5) while planning to upgrade to RouteMatch CA for its fixed route service. See Exhibit 6.

Exhibit 6. Dispatch software in use

	Current Software	Future Upgrade Plans
GoBus	RouteMatch 5.3.23 (latest version)	none
Longview Transit	RouteMatch	RM Cloud Version, w/AVL
Tyler Transit	RouteMatch TS 3.1.5	RouteMatch CA
NDMJ	TranAir	none

Source: Transportation-provider surveys

Languages
According to the East Texas Council of Governments – GoBus Limited English Proficiency Plan (dated June 1, 2012), there is only a limited percentage of the population within the 14-county region (0.3 percent) that speaks English "not well" or "not at all." Of that 0.3 percent, the vast majority speak Spanish. Given there are regular GoBus customers that speak Spanish, having Spanish-language assistance is critical. GoBus currently offers bilingual staff.

Tyler, as an urbanized area, identifies higher concentrations of LEP populations, including 8.1 percent of the Tyler Transit service area.[3] The most frequently spoken language is Spanish, representing 86.4 percent of LEP persons in Tyler. Tyler Transit provides service information in Spanish as well as employs limited bilingual staff. Spanish translation is also provided through a cooperative agreement with GoBus.

Longview is similar to Tyler in its higher concentrations of LEP populations. Within the Longview MPO, 8.3 percent speak English "not well" or "not at all."[4] The most frequently spoken language is Spanish. Longview Transit is working to provide a Spanish-language webpage, though it has yet to be implemented.

While maintaining bilingual staff is preferred, it is not practical, nor is it necessary given the modest LEP population within the region. Facilitating access to Spanish interpretation through Language Line or another telephone-based translation service is a valid option. Such a resource also provides access to other languages that are not prevalent enough to be covered by an LEP plan but are still present in the region.

Subsequent Stakeholder Input
Stakeholders were updated on the findings presented herein at the May 16, 2012, and July 25, 2012 Steering Committee meetings and via email. All Steering Committee members as well as the North East Texas Regional Mobility Authority (NET RMA) (which did not have a seated representative on the Steering Committee at that time) were invited to provide their comments.

---

[3] Tyler Transit Title VI LEP Four Factor Analysis and Implementation Plan.
[4] Longview MPO Limited English Proficiency Plan.

SECTION 6: CALL CENTER FUNDING

The primary means of funding the creation and continued operations of a Call Center are from federal and state grant programs. These monies are often supplemented by funds from various sources like local Aging and Disability Resource Centers (ADRC), human service agencies, and healthcare organizations. The Community Transportation Association of America (CTAA) conducted a survey of organizations that administer call centers. There were fifty-five representatives who gave a wide variety of responses. See Exhibit 7.

Exhibit 7. Sources of funding for call centers
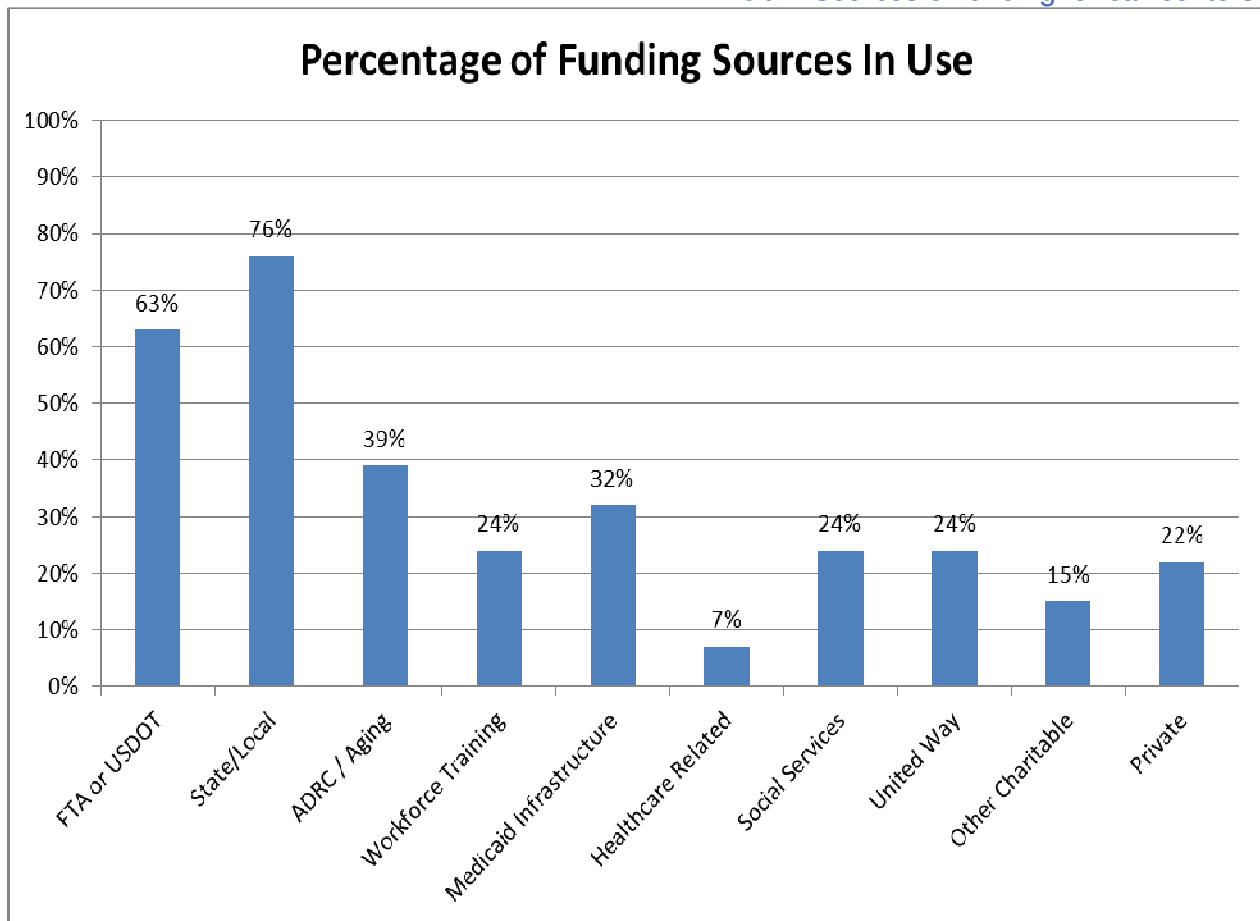
Percentage of Funding Sources In Use

Source: Community Transportation Association of America,
"One Call-One Click Transportation Services Toolkit."

Given the financing of call centers has few options available, many organizations utilize several sources. In the CTAA survey, twenty-five respondents selected either federal or state/local funds, while twenty-three chose neither. Medicaid Infrastructure Grant (MIG) funds from the Centers for Medicare & Medicaid Services (CMS) and a variety of charitable or private foundation funds are also used regularly. For the thirteen open-ended responses of "Other," options included advertising revenue, donations, fund raising, and individual contacts with other organizations.

Additionally, respondents replied that their call centers were not built all at once but rather piecemeal once funding became available. By demonstrating the value of specific call center attributes, partners were better able to leverage funds from sources.

Funding Available to Stakeholders

The primary means of funding a call center are public and private monies, which are detailed in this section.

FTA Grant Programs

As demonstrated through the case studies, there are a number of FTA grant programs available for call centers. Effective October 1, 2012, Moving Ahead for Progress in the 21st Century (MAP-21) eliminated Sections 5316 (Job Access and Reverse Commute/JARC) and 5317 (New Freedom). JARC was rolled into Section 5307 (Urbanized Area) and 5311 (Rural Area) Formula Grants, while New Freedom was consolidated with Section 5310, creating the Enhanced Mobility of Seniors and Individuals with Disabilities grant program. These FTA grants are applied for and awarded through TxDOT.

- Section 5307 – Urbanized Area Formula Grants: This program funds capital and planning assistance for Urbanized Areas (UZAs). It also includes job access and reverse commute projects. Operating assistance is available in areas with fewer than 200,000 in population. Requires a local match.
- Section 5339 – Bus and Bus Facilities Formula Grants: Although designed primarily for the purchase of buses, this competitive grant program can also fund construction or expansion of certain bus facilities, which may be combined with call center facilities. Requires a local match.
- Section 5310 – Enhanced Mobility of Seniors and Individuals with Disabilities: This program allocates formula funds to the State to meet the transportation needs of seniors as well as for programs that go beyond the ADA. It includes capital and operating assistance. Requires a local match.
- Section 5311 – Rural Area Formula Grants: Similar to Section 5307, this formula grant allocates funding for areas with fewer than 50,000 people for capital, planning, and operating assistance, as well as job access and reverse commute projects. Requires a local match.

Other Federal Programs

Besides FTA grants, there may be other federal programs available. These include the following, which have historically been used by entities around the country to fund Call Center projects.

- Mobility Services for All Americans (MSAA): Projects that increase transportation accessibility through intelligent transportation systems (ITS) technology are eligible through this program.
- Temporary Assistance for Needy Families (TANF): This can be used to provide training and employment grants as seen in New Hampshire.
- Medicaid Infrastructure Grant (MIG): For eligibility under this grant program, a State must offer personal assistance services statewide within and outside the home to the extent necessary to enable an individual to be engaged in full-time competitive employment.
- Older Americans Act: This is similar to the Section 5310 program.
- Congestion Mitigation Air Quality (CMAQ) Program: Eligible projects that provide either traveler information services or operating assistance falls under the Transportation Demand Management (TDM) or operating assistance sections, respectively, of available CMAQ funding.

- Veterans Transportation and Community Living Initiative (VTCLI) grant program: Draws on existing federal resources to strengthen and promote "one-call" information centers and other tools to "connect the dots" regarding work, education, healthcare, transportation, and other community services for veterans.

Private Entities
Private funds should also be considered in developing a Call Center. Local businesses may be interested in partnering with organizations through sponsoring, while private foundation and charitable funds (i.e., the United Way) are numerous and varied in their mission. Specifically in the East Texas region, the following entities should be contacted to gauge interest in supporting the Call Center:

- 2-1-1 Texas, East Texas Region (United Way),
- Anderson County Community Council in Palestine,
- Community Access in Tyler,
- Work Solutions East Texas,
- Family Outreach & Resource Center in Palestine,
- Integrated Health Services of Canton,
- Rusk County Veterans Transportation in Henderson,
- Salvation Army in Tyler,
- Special Health Resources of East Texas in Longview,
- State of Texas Department of Health, and
- Youth & Family Enrichment Center in Tyler.

Funding Horizon
Given the phased nature of the proposed Call Center recommendations, the funding horizon must reflect a minimum of five years to accommodate both set-up/capital costs and operating costs. The East Texas Regional Transportation Coordination Plan 2011 Update originally identified the Call Center as both a short-term strategy (one-year horizon) and mid-term strategy (two- to five-year horizon). The short-term strategy primarily included implementation of a single toll-free number that would route calls to a qualified, live "transit info desk." The mid-term strategy expanded the Call Center to include functions such as joint dispatching. In addition, one of the Plan's long-term strategies (six- to ten-year horizon) called for the consolidation of scheduling/dispatching service into one system, which could also potentially be a Call Center function.

The initial implementation timeline of less than one fiscal year included in the Coordination Plan 2011 Update proved too limited, as research and development of the mid-term strategy was desired in order to develop a "big picture" goal for the Call Center. Up to this point all planning for the Call Center has been funded through Texas Department of Transportation grants, through both the Coordinated Call and Supplemental Call.

Subsequent Stakeholder Input
Stakeholders were updated on the findings presented herein at the May 16, 2012, and July 25, 2012 Steering Committee meetings and via email. All Steering Committee members as well as the North East Texas Regional Mobility Authority (NET RMA) (which did not have a seated representative on the Steering Committee at that time) were invited to provide their comments.

SECTION 7: RECOMMENDATIONS

Recommendations – Role and Function

This section incorporates the previously discussed stakeholder input to develop a series of recommendations as to what functionality and roles the proposed Call Center should have. This section separates into two groups of recommendations: initial and eventual (between one and three years following Call Center launch).

Initial Recommended Functions

- **Information and referral.**
  As an "information clearinghouse," the proposed Call Center should also serve as a marketing tool, raising awareness of transportation services and boosting ridership by matching prospective customers with appropriate services. It should also provide current users with information that will help them understand how the variety of available services function as part of the larger regional system. This could become the backbone of the Call Center upon its launch. The information and referral function is relatively low cost, requiring minimal hardware and little to no software costs.
- **Assistance with paratransit eligibility determination.**
  Call Center operators should, at a minimum, have the ability to perform an initial eligibility assessment for prospective customers on all demand-response services and have all forms available and ready to mail if necessary. Informing callers of each service's age requirement, service area, and other basic screening questions will assure that they find the demand-response provider that best meets their needs in a more timely fashion. The center should also champion for consolidation of forms where possible, which would save customers time and remove the barrier of excess paperwork. Doing this would assuage the anticipated burden on the region's demand-response system and advance the goal of better serving mobility-disadvantaged persons.
- **Develop and promote a region-wide identity for all transit services in the East Texas region.**
  The proposed Call Center should be a platform to actively promote and market events such as "Interconnectivity Day" that have a regional focus. The Call Center should emphasize educating customers on how the various service providers work in tandem to offering travel throughout the region.

Eventual Recommended Functions

The following recommendations, for considerations both logistical and financial, are not recommended for immediate implementation. However, we feel their eventual implementation is critical if the proposed Call Center is to realize its full potential.

- **Facilitation of transit training.**
  The proposed Call Center can serve as a point of organization, facilitation, and support for the Steering Committee's goal of increasing travel training throughout the 14-county region. The Call Center should recommend training to callers whom operators deem might benefit from it and inform individual service providers of customer interest regarding travel training. They also should make sure users are signing up for training on the system they are most likely to use.

- **Shared reservations, scheduling, and/or dispatching for demand-response services.**
  We recommend the proposed Call Center eventually be a host for coordinated reservations, scheduling, and dispatching of demand-response transportation services. The level of coordination (including whether the center physically houses the operators performing these duties or merely hosts the server and manages the database (as is the case in Steuben County) should be determined at a later date closer to implementation.
- **Real-time traveler information for all services.**
  The proposed center should eventually become the go-to source for real-time travel information, allowing callers or users to track their transit vehicles (fixed-route or demand-response) through the Call Center and/or a corresponding website.

Recommendations – Administrative Organization

This section incorporates the previously discussed stakeholder input to develop a series of recommendations regarding the administrative structure of the proposed Call Center.

- **Create a Memorandum of Understanding (MOU) between participating agencies.**
  The MOU should include a tiered system that delineates participating agencies into two categories: lead agency (e.g., ETCOG) and supportive partner (e.g., Longview Transit, Tyler Transit, and NDMJ). The MOU should identify the role and responsibility of each partner as related to the proposed Call Center. "Limited partners" that do not have a role in the funding or operation of the Call Center would not need to be represented by an MOU, though any change in the relationship resulting in a funding or operational contribution would necessitate one. Sample MOUs are provided in Section 8.
- **Location of the Call Center facility to be determined by elected officials.**
  In December 2010, ETCOG's executive committee passed a resolution establishing the East Texas Rural Planning Organization (RPO). The RPO's policy board consists of the county judge or commissioner appointed by the commissioner's court from each of the fourteen counties, the mayors of Longview and Tyler, and the district engineer from each of the three TxDOT Districts as voting members. The RPO brings transportation planning to the local level; therefore, the information relating to the proposed Call Center will be presented to the RPO for their determination as to its future location.
- **Reach out to potential partners even if their role in the Call Center will be limited.**
  Research undertaken by the CTAA illustrates the value of participation by organizations and agencies that do not take on a partnership role. These "limited partnership" organizations include those wherein the primary contribution could be the continued exchange and dissemination of information. This information exchange would function in both directions – Call Center staff would distribute information to callers as appropriate, while the "limited partnership" organizations could promote use of the Call Center among clients and customers. These potential partners could include other transportation providers (e.g., airports, private intercity bus operators, and taxi services) as well as social service organizations (e.g., Area Agency on Aging of East Texas, East Texas ADRC, and East Texas Center for Independent Living). Ultimately, these "limited partnership" organizations may take on a more formal role, especially in regard to future travel training programs.

- Explore the potential for coordinating with Medicaid transportation providers.
East Texas Support Services Inc.'s Medical Transportation Division provides medical transportation services to all Medicaid-eligible clients through a contract with Access2Care. According to their website, nearly 300,000 unlinked trips were provided in 2009. Including information regarding these services and coordinating on whatever level possible should be one of the center's goals.

Recommendations – Operations

This section incorporates the previously discussed stakeholder input to develop a series of recommendations regarding the operational structure of the proposed Call Center.

- Operate and administer the Call Center at a central location within the East Texas region.
As the lead agency for the Steering Committee, ETCOG has expressed interest in assuming the lead role in the proposed Call Center. As a regional entity covering all 14 counties, ETCOG is well-positioned to assume the prominent role in the administration and operation of the proposed Call Center; however, EasTexConnects voted the East Texas RPO should ultimately make the decision as to the preferred location.

- Scale down Call Center staffing levels and improve skill sets.
GoBus sees the highest call volume, fielding 30,000 calls per month. (GoBus' current dispatching and call center operation is located in Longview.) Tyler Transit is a distant second, with 1,500 calls per month, followed by Longview Transit at 900 calls per month. However, Tyler Transit maintains the largest call center staff (6 persons), followed by GoBus (4 persons) and Longview Transit (1 person). All current levels of calls can be handled by four full time personnel and possibly a supervisor if the Mobility Manager is not located at the Call Center. In addition, certain Call Center staff must be focused on customer service and may be fluent in languages other than English to satisfy federal requirements. If any of the current call center positions double as dispatch positions, dispatch staff will need to be maintained at their respective organizations until such time as dispatch functions are taken over by the Call Center.

- Install one software package and appropriate supporting technologies to be used for all Call Center and dispatch operations.
To streamline operations and improve efficiency, one software application or suite needs to be installed for the Call Center to handle all calls and dispatch operations. Any modules that manage record-keeping and call-logging should also be installed to enhance customer relationships. The software must also have an online component for customers, which can reduce calls and also be used by those with hearing impairments. The software must be compatible with other necessary technologies like AVL and computer-aided dispatch (CAD), which can improve on-time performance, optimize dispatching operations, and provide real-time information to customers. The proprietary software (RouteMatch) is currently in use at three of the partner dispatch locations, although not all are using the same version (Exhibit 6).

- Provide language resources to comply with Title VI and operator LEP plans.
While maintaining bilingual staff is preferred, access to Spanish interpretation through Language Line or another telephone-based language service is a valid option. Such a resource also provides access to other languages that are not prevalent enough to be covered by an LEP plan but are still present in the region.

- Provide a robust telephone system.
  The telephone system must be able to support current call volumes as well as projected growth for all partners. To accommodate those with hearing impairments and Limited English Proficiency (LEP), it must have a TTD/TTY component, other language options, and 2-1-1 call forwarding and fax. The system must also have voicemail capabilities to capture after-hours callers.
- Call Center will operate Monday through Saturday to cover all partners' shifts.
  As shown in Exhibit 2, to cover all three partners' hours of operation the Call Center needs to be open from 6:00 a.m. to 7:00 p.m., Monday through Saturday. If necessary, staffing levels after normal business hours – including Saturday – can be reduced if fewer call volumes are experienced.
- Explore phased implementation for Call Center consolidation.
  Rather than implementing a full-scale consolidation of Call Center operations with dispatch service, a phased approach on an interim basis could realize cost efficiencies and cost reductions for project partners. In the first phase, only call center operations would centralize at one location while dispatching would remain at the original locations. The second phase would bring dispatch into the Call Center location. Although this could prove more economically feasible in the short-term, it would result in certain inefficiencies until full consolidation. Prioritizing roles and functions within the "big picture" will allow partners to secure funding at the appropriate time and ensure all prerequisite elements are in place for each phase of implementation.

Recommendations – Funding
This section incorporates the previously discussed stakeholder input to develop a series of recommendations regarding funding mechanisms of the proposed Call Center.

- Apply for many grants.
  As revealed in the case studies, organizations have funded call centers using a variety of sources, especially through the many government grant programs. FTA grants account for the majority of federal opportunities, but others such as CMAQ and TANF are also appropriate.
  - Seek operational funding through FTA grants (particularly Sections 5310 and 5311) and begin preparing applications as soon as the Call for Projects is announced. Include multiple letters of support from diverse agencies to bolster the value of the project.
  - With a qualifying partnership (see below), pursue funding under social service grant programs.
  - The Veterans Transportation and Community Living Initiative (VTCLI) grant program is a key funder of one-call centers, though it is unclear at this time whether additional rounds of grants will be available after FY 2012.
- Identify and partner with not-for-profit organizations and other government departments.
  Many social service organizations have resources already available and are often willing to partner with local agencies. Those organizations that are involved in senior and health services are particularly well-suited to providing support. Additionally, there are many local and state government departments that are eager to assist with Call Center development, like those in public health and transportation.

- ○ Explore partnership opportunities with other agencies that also provide similar one-stop call center services, such as 2-1-1 East Texas (East Texas Information Center), a program of the United Way of Smith County. Partnering with the regional information line for social services has proved effective in several case studies.
- Build Call Center components as funding becomes available.
  Not all aspects of the Call Center need to be completed at once. To reduce initial outlay, critical components would be implemented first with existing funding. Once other funds become available, additional functions may be incorporated such as dispatching and scheduling operations. Having critical systems up and running will demonstrate Call Center value that can leverage supplementary funds.
  - ○ In some situations, additional partnerships may be forged as the Call Center is developed. This may result in non-transit funding streams becoming available later in the process that were not available at its inception.
- Use appropriate grants as a match for other grants.
  Other organizations have shown that grants may be used as matching funds for other grants. TCCAP in New Hampshire was able to be more financially efficient by using their TANF funds as a match for their JARC/NF projects. This recommendation dovetails with the first (i.e., apply for several grants). Social services partnerships are critical in order to obtain funds from programs such as TANF.

SECTION 8: SAMPLE MEMORANDA OF UNDERSTANDING (MOU)

Exhibit 8. Denver Regional Mobility and Access Council MOU

Memorandum of Understanding
Denver Regional Mobility and Access Council

WHEREAS, there are several different transportation programs currently providing service within the Denver Metro Area to seniors and persons with disabilities;

WHEREAS, there are significant unmet needs for individuals requiring such transportation services;

WHEREAS, this service gap is anticipated to grow significantly in the next twenty years due to demographic trends;

WHEREAS, coordination efforts have been shown to result in increased service through improved cost efficiency, elimination of duplication, and access to additional funding;

WHEREAS, there is a need – and an opportunity -- to create a balanced network of diverse transportation services and options by coordinating transportation that serves this population in the Denver Metro Area; and

WHEREAS, there is a need – and an opportunity – to advocate for land use development and transportation planning in the region that will improve the access of this population to this network,

BE IT KNOWN THAT

The City of Centennial intends to participate in the establishment and functioning of the Denver Regional Mobility and Access Council (the "Council"). This Memorandum of Understanding documents this intent and the organization's commitment to the primary mission of the Council.

The primary mission of the Council is to:

- Help develop, implement, and provide guidance to the coordination of transportation options within the Denver Metro Area so that (1) seniors and persons with disabilities can access local and regional transportation services to get to locations throughout the Denver Metro Area; and (2) municipalities, human service agencies and other organizations can purchase such coordinated transportation services for their citizens, clients, and customers; and

- Advocate for planning, policies, and practices that support this goal.[*]

The Denver Metro Area shall be defined as including the Counties of Adams, Arapahoe, Boulder, Broomfield, Clear Creek, Denver, Douglas, Gilpin, and Jefferson,

---
[*] By commitment to the primary mission of the Denver Regional Mobility and Access Council, the City of Centennial does not confer upon the Council the authority to represent the City or the City's interests in land use development and transportation planning unless the City Council for the City of Centennial expressly confers such authority upon the Denver Regional Mobility and Access Council and provides to the Council specific direction concerning the City's position of advocacy, City policy, and City interest(s).

Memorandum of Understanding
Denver Regional Mobility and Access Council/City of Centennial
Page 2

In addition to actual service delivery options, the focus of the Council's coordination and advocacy efforts will encompass transportation options such as mileage reimbursement, subsidy programs, volunteer driver programs, and vehicle sharing, as well as related functions such as travel training, information referral, call center functions, vehicle procurement, insurance and maintenance, training, and technological support.

In signifying this intention and commitment, the City of Centennial pledges to:

♦ Designate one representative (and/or up to two alternate representatives) to the Council, and ensure that the representative attends regularly scheduled meetings of the Council and is active in the functioning of the Council and Committees, subject to reasonable availability of elected or administrative personnel to serve as representatives.

♦ Provide meeting space for the Council and/or Committees, as needed and subject to availability of space and available resources of the City.

Signing this Memorandum of Understanding does not signify a commitment of funding at this time.

Either party may unilaterally terminate this Memorandum of Understanding for any or no reason with 14 days' written notice sent via regular mail or hand delivery to a representative of the other party.

IN WITNESS WHEREOF, indicates its support and intent:

Name:	Randy Pye
Title:	Mayor
Organization:	City of Centennial
Signature:	_____
Date:	_____, 2006

ACCEPTANCE BY:

Name:	_____
Title:	President
Organization:	Denver Regional Mobility and Access Council
Signature:	_____
Date:	_____, 2006

Exhibit 9. Accessible Coordinated Transportation of Pikes Peak Region Draft MOU

Business Plan for Implementing a Joint Scheduling & Dispatch Center in the Pikes Peak Region

ACT

Accessible Coordinated Transportation of the Pikes Peak Region

Accessible Coordinated Transportation and
_____
2011 Memorandum of Understanding

Signatories

This Memorandum of Understanding is made by and between Accessible Coordinated Transportation (ACT) and _____.

Purpose

Accessible Coordinated Transportation is an organization committed to coordinating the provision of specialized transportation resources and increasing the mobility of the consumers served by the member agencies.   ACT will increase the number of trips available for consumers by using resources efficiently, reducing duplication, and working to develop additional resources for specialized transportation services.

ACT works in partnership with the Pikes Peak Area Agency on Aging and the Pike's Peak Area Council of Governments, Mountain Metropolitan Transit and the City of Colorado Springs, the Pike's Peak Regional Transportation Authority, El Paso County, and other agencies with an interest in specialized transportation services.

ACT Goals

ACT members will work to achieve the following goals. A complete set of goals and objectives are included as Attachment 2 and will be updated annually.

- Create a joint reservation, scheduling, and dispatch center that will serve consumers needing to access specialized transportation services provided by human service providers in the region.
- Make available comprehensive and consumer friendly information on mobility options for consumers needing specialized services.
- Develop a joint training program among human service and other transportation providers and establish a mechanism that will enable all providers to access necessary training for their drivers. Objectives are to provide cost-effective training, strengthen the overall skill levels of paid and volunteer drivers, establish common standards of quality and means to identify drivers that meet specific waiver requirements for various population groups.
- Establish protocols for procuring maintenance services jointly in order to obtain lower prices. This will include identifying services that can be effectively procured together, routinely comparing prices, such as through annual requests for quotation, and evaluating the quality of services obtained.
- Improve the overall coordination of the delivery of specialized transportation services by working in partnership with other stakeholders to achieve common objectives, strengthening

Draft Final February 14, 2011   49

the working relationships of the member agencies, and developing the management capacity to expand the activities that ACT is able to undertake.

Collaborative Partners

A collaborative approach from all our local participating agencies is essential for ACT's transportation coordination activities to be a success. The parties will work together to improve coordination of specialized transportation services, to provide information and materials to consumers that is easy to understand and use, to avoid duplicative paperwork and administrative overhead through the integration of staff and services necessary for reservations, scheduling, and dispatch of transportation services, and to promote the use of the most cost effective transportation options, especially fixed route bus services.

ACT Board

The ACT Board will guide the organization, oversee the budget, and monitor progress on meeting goals and objectives. The Board will oversee a manager who will be responsible for carrying out the business of the organization

ACT will provide direct services and will support specific services provided by member agencies including a joint reservation, scheduling, and dispatch center, joint training services and other coordination activities.

The ACT Board will oversee the development of the management capacity necessary to:

– Administer grants;
– Manage the financial recordkeeping and routine audits; and,
– Meet local, state, and federal regulations, reporting requirements, and policies.

Mutual Agreements

Each party will work collaboratively with ACT members towards the mission of coordinating the provision of specialized transportation resources and increasing the mobility of the consumers served by the member agencies

ACT and _____ agree to abide by the Health Insurance Privacy Portability and Accountability Act (HIPAA) and any applicable Federal and State privacy laws.

Each Provider Organization will assign a liaison(s) to serve as a Board member and the single point of contact for purposes of this understanding.

Each party will be responsible for participating in board meetings and working with other members to develop a consensus on items of discussion.

Each party will assign appropriate and adequate staff and resources, as mutually agreed by the parties, to carry out responsibilities outlined in this memorandum.

Resources

ACT members recognize the importance of developing a collaborative approach to seeking and managing resources. When funding opportunities arise, the ACT Board will evaluate each to determine if it is appropriate to submit a joint application for some or all funding, if individual

applications will be supported by other member agencies, and if it is appropriate to set priorities based on individual agency requests.

Terms of the Memorandum

This Memorandum of Understanding is effective for the 2011 calendar year.

The Memorandum has no expiration date. However, the signing parties will review this Memorandum of Understanding annually.

In the event that the Collaborative Partner violates any of the terms or conditions of this Memorandum of Understanding, ACT reserves the right to immediately terminate this agreement.

In the event of termination of this Memorandum of Understanding for any other reason, the party terminating the agreement shall give notice of such termination in writing to the other party. Termination shall be effective sixty (30) days after the date of receipt of notification.

Amendments will be made as deemed necessary and agreed to by the signing parties.

As the representative of _____, I have read, fully understand, and agree to the terms and guidelines set forth in this Memorandum of Understanding and also the User Confidentiality Agreement (Attachment 1).

Accessible Community Transportation   (Agency Name)
c/o Lynn Hopeman, President   (Address)
Pikes Peak Partnership   (City), CO (Zip)
1352 N. Academy Blvd.
Colorado Springs, CO   80909

_____   _____
Printed Name   Printed Name

_____   _____
Signature   Signature / Representative

_____   _____
Date   Date