

# OMEGA Regional Transportation Call Center Model Feasibility Study



*Technical Memorandum #1:*

## Assessment of Existing Regional Call Center

*Draft – August 23, 2021*



Bethesda, MD | Austin, TX | Seattle, WA

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## Appendix A: Memorandum of Understanding

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## Appendix B: Memorandum of Understanding

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# Technical Memorandum #1: Assessment of Existing Regional Call Center

## Introduction

This technical memorandum is the initial document from technical assistance being provided to the Ohio Mid-Eastern Governments Association (OMEGA) in the assessment of the current regional call center for the nine-county region of Belmont, Carroll, Coshocton, Guernsey, Harrison, Holmes, Jefferson, Muskingum, and Tuscarawas Counties. At the outset of the project it was noted that a similar planning process was not undertaken before the implementation of the current regional call center in 2019, and therefore this study provides the opportunity to evaluate the existing center and provide a plan for improving future use and effectiveness.

This document provides an historical review and an assessment of existing conditions, with a particular focus on the organizational structure, call center outcomes, and relationships between different stakeholders and organizations. Much of the information and data contained in this technical memorandum was obtained through numerous interviews and discussions with the following key stakeholders in the region. These interviews offered the opportunity to obtain stakeholder thoughts on the strengths of the current call center and potential improvements, and to discuss their overall vision for the call center:

- OMEGA staff – Executive Director, Transportation Director, and Transit Planner
- South East Area Transit (SEAT) staff – Transit Director, Business Director, and Operations Director
- Access Tusc Transit Director
- Mobility managers for Belmont, Coshocton, Guernsey, and Muskingum Counties

In addition, interviews were also conducted with the following:

- Ohio Department of Transportation (ODOT) Office of Transit Administrator and Public Transit Manager to obtain ODOT's input on the regional call center, and how it fits within broader state mobility management and coordination efforts.
- The mobility manager who oversees the Region 8 Mobility Solution Center to learn about their call center, and to obtain her insights and input on lessons learned in the implementation of a call center in an adjacent region to OMEGA.

The study team also received input through the following meetings:

- A presentation to the Regional Coordinated Council (RCC) on June 16, 2021, provided the opportunity to review the study work plan, update the RCC on current project efforts, and obtain the committee's input on the current call center and possible modifications or improvements. As noted by OMEGA, the RCC includes a diverse group of human services transportation providers, funders, and coordinators throughout the region. This group assists in the development of the Regional Coordinated Human Services/Public Transit Plan for the OMEGA region that includes Belmont, Carroll, Columbiana, Coshocton, Guernsey, Harrison, Holmes, Muskingum, and Tuscarawas Counties.
- The Regional Council of Mobility Managers meeting on July 9, 2021, offered the opportunity to obtain the group's input on how the regional call center can better support their efforts.
- The OMEGA Steering Committee meeting on July 21, 2021, provided the opportunity to obtain additional thoughts and comments on the regional call center study.

Overall this technical memorandum should be treated as a draft document, and revisions and additions will be incorporated into a version that will ultimately be included as a chapter in the draft final report. A future technical memorandum will provide alternatives for improving call center effectiveness, and ultimately all study documents will be incorporated into the final report that will include an implementation plan with specific action items to guide future steps.

## Background

In 2018 the Tuscarawas County Committee on Aging, Inc. submitted an application to ODOT for a grant through the Ohio Mobility Management Program. This purpose of this ODOT program is to increase access to mobility for Ohioans by increasing understanding and awareness of transportation needs, promote coordination of transportation options to meet needs, and build sustainable and healthy communities by integrating transportation into planning and programs.

The need for the call center was initially identified by the mobility manager for Tuscarawas County, who through her position recognized that she was spending extensive time out of the office in meetings and unable to answer calls – and therefore leaving people in need of transportation services waiting for resources and information. The application to ODOT noted that the Tuscarawas County Committee on Aging had already been the lead agency for a mobility management program for nine years, and the CY2019 grant would provide the opportunity to build upon this effort and start a call center that would broker trips to transportation providers in Tuscarawas, Carroll, Harrison, Guernsey, and Muskingum Counties.

In the Community Need section of the application to ODOT, Tuscarawas Committee on Aging stated the following:

- A call center would work with Tuscarawas, Carroll, Guernsey, Harrison, and Muskingum Counties to help eliminate duplication of services for out-of-county trips.
- The call center would receive calls and coordinate with other county providers to look for medical appointments with similar destinations.
- By coordinating trips from different counties more vehicles would be available in the county to perform more trips, and therefore a costs savings would result from this coordination.

The Project Description section of the application stated that the call center would be brokering trips to transportation providers, and considering trip destinations and how they could be coordinated on a regional level. The application also noted that the regional approach to transportation would help small rural providers connect services with other providers who might have trips going in the same direction.

The budget submitted through application is provided in Table 1-1. While there were discussions about a regional approach to the required matching component to the application, eventually SEAT provided the required 20% match.

**Table 1-1: CY2019 Budget**

Line Item	Amount
Call Center Wages	\$20,859
Call Center Fringes	\$4,002
Professional/Technical Services	\$500
Office Supplies (Mobility Manager only)	\$1,000
Utilities (Mobility Manager only)	\$2,800
Marketing	\$1,500
Cell Phone/Training and Other	\$2,400
Lease - Office (Call Center)	\$2,450
<b>Total Expenses</b>	<b>\$35,511</b>

## Transition to SEAT

Tuscarawas County Committee on Aging was successful with the application, though the decision was subsequently made to transition the call center to SEAT, the public transportation provider in Muskingum, Guernsey, and Noble Counties. In discussions with SEAT they noted that as a small regional transit authority they can be nimbler than a larger entity in taking on new projects such as the call center; their Board of Trustees support service and program flexibility; and the staff is familiar with the need to wear many different hats and take on a variety of responsibilities in their jobs.

Subsequently, in January 2020, SEAT took over operations of the call center. The Memorandum of Understanding (MOU) between Tuscarawas County Committee on Aging and SEAT that outlined the terms and conditions for operation of the call center is provided in Appendix A.

## Mid-Ohio Mobility Solutions

Following a 2018 strategic planning process undertaken by their Board of Trustees, SEAT created a new standalone nonprofit 501c(3) organization, Mid-Ohio Mobility Solutions (MOMS). The vision for this organization was to fill gaps in transportation services in Muskingum, Guernsey, and potentially Noble Counties. According to the SEAT Board of Trustees August 21, 2019 meeting minutes, MOMS opened their doors on July 1, 2019.

The Articles of Incorporation for MOMS includes these specific objectives for the organization:

- To help close transportation barriers and gaps, by expanding services and providing more transportation options for older adults, individuals with disabilities, vulnerable families and general public population, by providing education, information and solutions to the barriers. This will aide in meeting their basic life needs in the Mid-East Ohio Region, including the service area of the local transit providers.
- To make contributions to public transportation entities consistent with their purpose and function.
- To purchase equipment, goods or materials in support of or to assist public transit entities in the performance of their missions as well as to provide technical support and contractual related services.
- To do whatever is deemed necessary, useful, or conducive to carrying out the purposes of the Non-Profit Corporation generally by virtue of the provision of the Ohio Non-Profit Corporation Law.

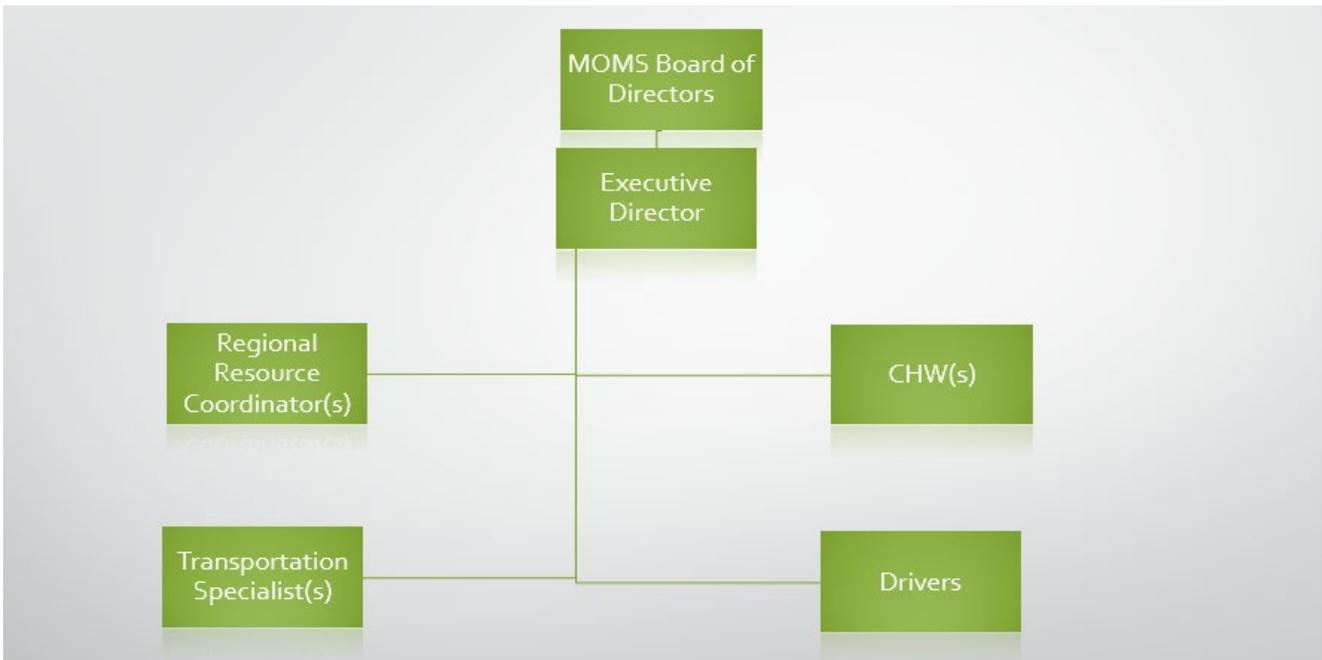
In discussions with SEAT they noted that during the process of creating the new nonprofit organization, the concept to connect counties in the OMEGA region through the call center was introduced. With SEAT's vision of MOMS filling gaps in services, they reported that MOMS would be a logical organization to run the call center, and to be an in-between source if someone needed information on available services and assistance in scheduling a ride. In discussions with SEAT staff they also noted:

- To house the call center, SEAT remodeled a former café space at their transit center using their own funding. SEAT also provided loaner staff for MOMS.
- SEAT then applied for the funding to continue call center operations.
- When setting up the MOMS call center they looked at a Job and Family Services (JFS) call center as a model, with an intent to mimic the brokerage type model.

## Organization Structure

The organization structure chart for MOMS provided by SEAT is shown in Figure 1-1.

**Figure 1-1: MOMS Organizational Structure**



Source: SEAT

Several notes in regard to the MOMS Organizational Chart:

- As indicated, MOMS is overseen by a Board of Directors and is intended to be a separate entity from the transit system. SEAT reports that greater board recruitment was limited due to the COVID-19 pandemic, and as a result the MOMS Board of Directors is composed strictly of members of the SEAT Board of Trustees or are SEAT employees. These are the current members of the MOMS Board of Directors:
  - President - Kurt Ufholz (also the current SEAT Board of Trustees President as the City of Zanesville appointee)
  - Secretary/Treasurer – Dianne Gill (also SEAT Business Manager)
  - Board Member – Robert Guentter (also member of the SEAT Board of Trustees as the Village of South Zanesville appointee)
  - Board Member – Andrea Dupler (also SEAT Operations Manager)
  - Board Member – Howard Stewart (also SEAT Transit Director)

- Call center staff are Community Healthcare Workers (or working on their certification), employed by SEAT and on loan to MOMS, who split their time between transportation call center duties and Bridges to Wellness community healthcare duties. Through the interview with SEAT they estimated that their work is approximately 60% related to transportation. The employee loaning agreement is discussed in more detail in a later section.

## SEAT-MOMS MOU

There is also a Memorandum of Understanding (MOU) between SEAT and MOMS that states services to be provided by SEAT and to be paid for by MOMS. SEAT reported that the MOMS Board of Directors developed the MOU to complete the private nonprofit application for the organization. This current MOU is dated June 3, 2021, and continues through June 30, 2022. A copy of the MOU is included in Appendix B.

Through the MOU SEAT agrees to oversee and manage MOMS; assume administrative, programmatic, financial, and legal responsibility of funding organizations; and implement and operate MOMS in accordance with any conditions imposed by the funding organizations. The MOU states that with SEAT's agreement to provide fiscal, management, and administrative oversight and other responsibilities MOMS will pay \$250 per month – though SEAT reports that no money has been exchanged to date.

The MOU is signed by the SEAT Transit Director (who is specifically identified in the agreement as the person designated by the MOMS Board of Directors to act as authorizing official who acts as the principal coordinator of the MOMS daily business) and a MOMS representative who is the chair of the Board of Directors.

## Employee Loaning Agreement

As noted earlier there is an agreement on the employee loaning arrangement. In the collection of documents SEAT provided a draft Memorandum of Agreement that details the process for SEAT to serve as "Loaning Employer" and provide employees to perform work for and on behalf of MOMS. A copy of this document is included in Appendix C.

## Funding / Budget Information

In January 2020 when SEAT assumed operations of the regional call center they also took over responsibilities for developing a budget and applying to ODOT for funding. The budgets for CY2020 and CY2021 as provided by SEAT are shown in Tables 1-2 and 1-3. As indicated these budgets include the call center and a mobility manager position as one project.

**Table 1-2: SEAT CY2020 Budget**

Line Item	Amount
Salaries and Wages (1)	\$104,130
Fringes	\$55,667
Professional/Technical Services	\$2,000
Office Supplies (Mobility Manager only)	\$2,199
Utilities	\$4,600
Cell Phone/ Training and Other	\$8,404
<b>Total Expenses</b>	<b>\$177,000</b>

- (1) Includes salaries for following positions:
- Full-time Mobility Manager
  - Part-time Community Health Worker / Call Center
  - Full-time Call Center
  - Two Part-time Call Center

Source: SEAT

**Table 1-3: SEAT CY2021 Budget**

Line Item	Amount
Salary and Wages (1)	\$117,406
Fringes	\$81,821
Professional/Technical Services	\$1,000
Other Materials and Supplies	\$3,000
Utilities	\$2,000
Dues and Subscriptions	\$500
Travel and Meetings (Trainings)	\$3,500
Advertising/Promotion Media (Printing)	\$3,000
<b>Total Expenses</b>	<b>\$212,227</b>

- (1) Includes salaries for following positions:
- Mobility Manager
  - Transportation Specialist /Community Health Worker - Muskingum County
  - Transportation Specialist - Guernsey County
  - Transportation Specialist - Two positions

Source: SEAT

For CY2022 SEAT applied to ODOT for funding through the Ohio Transit Partnership Program (OTP2). This program is a discretionary program and projects are selected on a competitive basis. Eligible projects include those focused on regionalization and coordination. Table 1-4 provides the proposed CY2022 budget, though as indicated it is only for the regional call center positions and does not include the mobility management position as in the previous two years.

**Table 1-4: Proposed CY2022 Budget**

Line Item	Amount
Salary and Wages (1)	\$59,670
Fringes	\$41,299
Professional/Technical Services	\$1,000
Contract Maintenance Services	\$1,000
Other Services	\$700
Other Materials and Supplies	\$3,000
Utilities	\$3,000
Dues and Subscriptions (Publications)	\$2,000
Travel and Training	\$7,800
Advertising/Promotion Media (Printing)	\$2,000
Other Misc. Expenses	\$2,000
<b>Total Expenses</b>	<b>\$123,469</b>

- (1) Includes salaries for following positions:
- Full-time Transportation Specialist
  - Part-time Transportation Specialist (27.5 hours/week)
  - Part-time Transportation Specialist (20 hours/week)

Source: SEAT

In August 2021, just as this technical memorandum was being finalized, SEAT was notified by ODOT that they were not approved for OTP2 funding. SEAT staff reported that would be meeting with the SEAT and MOMS Boards in late August to discuss the possible direction of the call center in light of this ODOT announcement.

SEAT also reported that their Board of Trustees appropriated \$10,000 as seed money to start MOMS. They also noted that the SEAT capital investment for MOMS is about \$4,800, and that SEAT's building maintenance labor is estimated for \$2,120 to prepare the building. SEAT mentioned that these figures do not include the Maintenance Director's time and activity, and do not include fringes benefits as well.

## 2020 Operational Plan

SEAT provided a January 2020 Operational Plan that provided an overview of the regional call center, and discussed staffing, technology, goals, and projected outcomes for the center. The plan notes that at that time MOMS is operating as a brokerage call center from the hours of 8:00 a.m. to 4:00 p.m., Monday through Friday. The plan states that one of the MOMS’ objectives is to find the most cost-efficient and reliable transportation options for citizens within the OMEGA region, and that the call center would coordinate rides for the public, medical providers such as emergency rooms, and those with late work hours.

A copy of the full plan is provided in Appendix D.

## Marketing Efforts

The current call center is marketed as Mid-Ohio Mobility Solutions, the name that was given by SEAT when they assumed operations. Information on Mid-Ohio Mobility Solutions is not found through the SEAT website, but is listed on the OMEGA website as one of their programs – <https://mobility-options.org>. While the 2020 Operational Plan noted that call center hours would be from 8:00 a.m. to 4:00 p.m., currently published hours are 9:00 a.m. to 3:00 p.m., Monday through Friday.



Through the stakeholder interviews it was noted that when the call center was first started, every mobility manager was to market the services provided through the center. However, it was mentioned through the interview process that this marketing had waned, and as a result call volumes in some counties were accordingly lower. Another perspective that was noted is that the marketing services waned as a result of low call volumes in most counties. Overall center call volumes are discussed in a later section.

## Call Center Positions

The call center has been managed by the SEAT Operations Director since taking over the oversight from Tuscarawas County Committee on Aging. As indicated in the proposed CY2022 budget the call center is to be staffed by one full-time and two part-time Transportation Specialist positions.

The job description for this position includes the following duties, and a full job description is provided in Appendix E:

- Responsible for intake of transportation related calls to the agency.
- Communicates with transportation providers, consumers and other agencies in regards to setup of transportation services for eligible individuals according to established program standards.
- Inputs required reporting information into agency reporting software.
- Updates transportation website and social media accounts as necessary under the direction of mobility manager.
- Assists consumers with verifying services that have been authorized/scheduled for them.
- Completes case note documentation in compliance with Agency policy for all contacts with and on behalf of consumers.

## Call Center Name

Through the various discussions with key stakeholders for the preparation of this technical memorandum the call center was typically identified as Mid-Ohio Mobility Solutions, or MOMS. The OMEGA website also notes this title as the call center name. Through interviews it was often mentioned that the “Mid-Ohio” component of the call center name was confusing since the region served by the center stretched to the eastern border of Ohio with West Virginia and did not include the Columbus area that many people would consider mid-Ohio.

In September, 2020 three potential names for the regional call center were presented to the OMEGA Steering Committee, and a vote taken. It was announced in October 2020, that the result of this vote was to change the name of the regional call center to Mobility Solutions Center. However, as noted through the initial outreach process for this study MOMS was often noted as the name. Through the interview with SEAT staff they noted that SEAT and its board is committed to the name MOMS and there were no plans to change the name.

## Call Volume

Call volumes for the regional call center for 2020, broken out by month and by county in the region, are provided in Table 1-5. This table also indicates the population of each county, primarily for the study team to evaluate the use of the call center in relation to regional population numbers.

**Table 1-5: Call Volumes for the Regional Call Center (2020)**

2020	January	February	March	April	May	June
<b>Belmont</b>	0	3	2	1	0	3
<b>Carroll</b>	1	1	0	0	0	0
<b>Coshocton</b>	2	1	0	1	5	8
<b>Guernsey</b>	5	4	1	2	0	4
<b>Harrison</b>	0	3	2	0	0	0
<b>Holmes</b>	0	1	0	1	0	0
<b>Jefferson</b>	0	2	1	0	0	0
<b>Muskingum</b>	27	7	11	4	5	26
<b>Tuscarawas</b>	11	14	5	1	4	12
<b>Monthly Total</b>	46	36	22	10	14	53

2020	July	August	September	October	November	December	2020 Total	% of Region	Population (1)	Population % of Region
<b>Belmont</b>	0	0	0	0	3	0	12	2.0%	68,024	14.3%
<b>Carroll</b>	0	4	0	3	0	2	11	1.8%	27,332	5.8%
<b>Coshocton</b>	7	5	2	12	3	3	49	8.1%	36,585	7.7%
<b>Guernsey</b>	0	2	0	2	6	7	33	5.5%	39,111	8.2%
<b>Harrison</b>	0	0	0	0	0	0	5	0.8%	15,211	3.2%
<b>Holmes</b>	0	0	0	0	0	0	2	0.3%	43,901	9.2%
<b>Jefferson</b>	0	0	0	0	7	0	10	1.7%	66,371	14.0%
<b>Muskingum</b>	27	27	36	89	64	85	408	67.5%	86,131	18.1%
<b>Tuscarawas</b>	6	10	1	4	3	3	74	12.3%	92,335	19.4%
<b>Monthly Total</b>	40	48	39	110	86	100				
<b>2020 Region Total</b>							<b>604</b>		<b>475,001</b>	

Source for Call Numbers: SEAT/MOMS

(1) Based on American Community Survey 2015-2019 5-Year Estimates

A review of this data provides the following observations:

- The majority of the calls were from Muskingum County.
- Call volume increased, with the last three months of the year representing the highest call totals for the year.

Call volumes for the first seven months of 2021 are shown in Table 1-6. As indicated in this data, call center volume peaked in April with the highest volume since the beginning of 2020, but then has drastically dropped to a low of only 16 calls reported received through the call center in July 2021.

**Table 1-6: Call Volumes for First Seven Months of 2021**

2021	Monthly Total
January	66
February	29
March	81
April	111
May	46
June	27
July	16

Source: SEAT/MOMS/OMEGA

## National Center for Mobility Management Technical Assistance

OMEGA was awarded a technical assistance grant from the National Center for Mobility Management (NCMM) that was used to convene a team to work on a call center model that would generate more widespread regional acceptance. The NCMM team included the following representatives:

- OMEGA Transit Planner
- Mobility managers for the following counties;
  - Belmont County, National Church Residences (NCR) Transportation Director. This person has subsequently retired and NCR also retired their transportation program.
  - Coshocton County, position located at the Coshocton County Coordinated Transportation Agency
  - Guernsey/Muskingum Counties, position located at SEAT
- Access Tusc Transit, Director of Transportation (person who initially developed the call center concept and submitted the grant to ODOT when previously working for the Tuscarawas County Committee on Aging)

## Current Model Structure Assessment from NCMM Team

Through the NCMM technical assistance the group assessed the regional call center, and identified the following issues and concerns with the current model:

### Basic Model Structure

- Potential Conflicts of Interest
- Project Center is Not Independent of Transit Provider
- Lack of Adequate Checks and Balances

### Oversight

- Limited Oversight with Board
- No Direct Oversight from Region
- Weak or Unknown Checks and Balances
- No Regularly Scheduled Board of Director Meetings

### Regional Input and Reporting

- No Direct Input from Region
- Limited Reporting

### Funding

- Weak Transparency
- Weak Checks and Balances
- Potential Conflicts of Interest

### Overall Areas of Concern

- Model was Developed without Regional Input or Consensus
- Little Transparency and Regional Accountability
- Lack of Adequate Checks and Balances
- No Designated Project Manager Independent of Transit System
- All Employees are Transit Employees
- Operations and Budget are Not Independent of Transit System
- Transit Provider Applies for and Manages all Funding
- Potential for Conflicts of Interest at Every Level
- Transit Call Center Assigns Trips to Self and to Counties Outside its Service Area without Known Procedures and Methodology

## Proposed Model Structure from NCMM Team

The NCMM group then developed a generic regional project model that would respond to these issues and concerns.

### Basic Model Structure

- No Conflicts of Interest
- Scalable
- Can Interact with Other Centers
- One Specific, Designated Project Center Independent of All Transit and Transportation Providers
- Compatible with Mobility Ohio and Other State and Regional Initiatives

### Oversight

- Both Private and Regional
- Occurs at All Levels

### Regional Input and Reporting

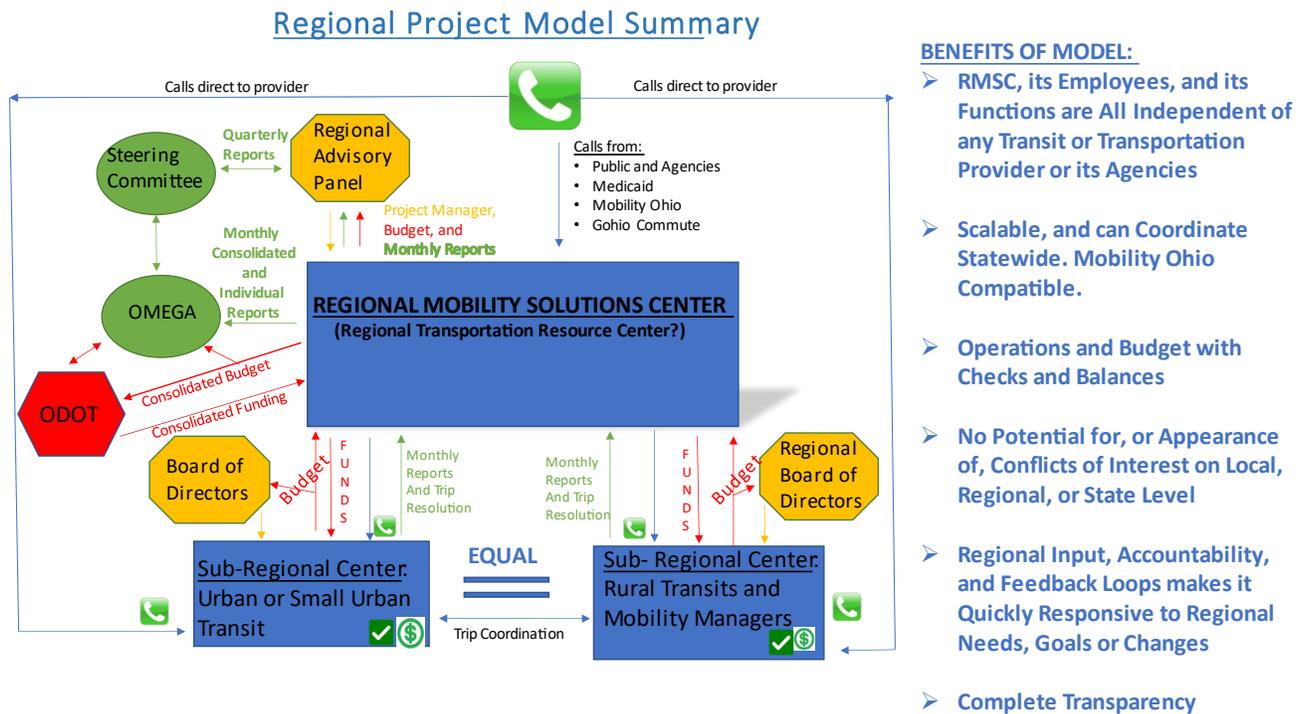
- Input at All Levels from Region
- Transparency
- Feedback Loops
- Checks and Balances
- Accountability at Multiple Points

### Funding

- Financial Transparency
- Checks and Balances
- No Conflicts of Interest
- RMSC Submits One Consolidated Budget for Funding and Manages Funding

The development of the new model culminated in the regional project model summary shown in Figure 1-2, along with the projected benefits of this model. This model assumed that SEAT would continue to operate a call center for their service area independently from the rest of the region.

**Figure 1-2: NCMM Technical Assistance Group Regional Project Model Summary**



According to OMEGA, the NCMM technical assistance helped answer what was lacking in the current call center approach. This included:

- Mobility managers can only be in one place at one time. Those that cover multi-county regions can be gone for hours or days at a time. Having a place that a client could call and get some resolution or help with a trip was the initial vision.
- The call center must have a regional focus, moving people and connecting services between counties. It should not just be a referral center, and be able to schedule trips or provide connectivity to providers.
- With that said, the vision was for call center to be more than just a resource for securing a trip. It was also intended to help older adults, people with disabilities, and others who are struggling to make connections to the community, and ensure they were truly helped. This assistance could include connecting them to eligible funding programs and appropriate follow-up calls. The vision was for a call center that provides more than just transportation information, and is a full resource center with a focus on the broader needs of older adults and people with disabilities.
- Scheduling software used by transit providers is not fully integrated in the region, and there is a need to take technology to the next level and to connect regionally.

## Regional Resource Guide

Separate from this study, OMEGA is currently working with the mobility manager for Muskingum and Guernsey Counties on a regional resource guide. This guide will be both an online and paper version resource that includes all transportation options available by county or by zip code in the region. The mobility manager for Muskingum and Guernsey Counties is designing the site in conjunction with the IT firm that OMEGA uses. OMEGA will house the site for purposes of continuity, but the mobility manager for Muskingum and Guernsey Counties will operate the site.

Through the interviews stakeholders expressed support for the regional resource guide, and that it will be a useful tool. As appropriate, the results from the development of the regional resource guide will be incorporated into recommendations on call center functions and operations that will be developed through the next phase of the study.

## Lesson Learned from Region 8 Call Center

In addition to stakeholders throughout the region, the study team also interviewed the director for the new Mobility Solution Center in adjacent Region 8. This recently-launched call center is based in Perry County and serves Athens, Hocking, Meigs, Monroe, Morgan, Noble, Perry, and Washington Counties. This section provides a summary of the input and lessons learned through this discussion:

- Region 8 is very rural, with high poverty levels, high elderly population, and the need to reach resources that are outside of county. The call center was initially funded through an Appalachian Regional Commission grant. They also received an ODOT OPT2 grant, and began receiving ODOT Section 5310 in July 2021. Local match for the call center is provided by JFS.
- The call center director is a shared employee (she supervises the NEMT side of the call center too). JFS provides other in-kind match.
- The call center is unique in that it is located within JFS. On one side is the Ohio Medicaid NEMT program, where two employees verify Medicaid eligibility. Call center calls can go to mobility specialists or the mobility manager (through 833-You Go Go). Mobility specialist staff was added to ensure coverage.
- They devised a phone system flow worksheet in a Google Doc that flags time sensitivity. The call center conducts individual needs assessments, and selects providers that best fit the transportation need. Mobility managers in the field can access a live feed in the Google Doc of call intake information, and track the notes entered on each individual request. A message is pushed out to the appropriate area mobility manager on individuals needing service in their county.
- The call center director's agency completes a follow-up contact 3-5 days afterward with the customer, and conducts a satisfaction survey.

- The call center had a soft opening March 17, 2021, and conducted limited outreach due to the COVID-19 pandemic. A grand opening was conducted about 45 days after the soft opening.
- The call center is currently located on ground level of Hocking College Perry Campus. JFS is building a new building which is anticipated to open August 2022. JFS plans to move the call center to this location once the building is completed.
- The intake process helps determine an individual's eligibility for Medicaid NEMT or other programs, and assesses if they use a mobility device, need an additional attendant, have a service animal, or have specific mobility issues. A social worker approach is used, and the call center may make suggestions such as applying for Medicaid if they are not a current recipient. The goal is to provide service to the client at zero cost. If not eligible, the call center seeks other options.
- The region spans eight counties, in which there are five mobility managers. One mobility manager serves two counties; two counties do not have mobility managers. While one county has no public transit, services in other jurisdictions are coordinated to provide regional trips as far as Columbus. They also coordinate with mobility managers outside the region for cross-regional trips.
- Prior to some counties having their own mobility managers there was some pushback, and fear of takeover. They worked to assure mobility managers and transit agency staff that they weren't "taking away their numbers.", but instead were focused on success for all providers in the region.
- The call center recently scheduled a second regional mobility manager roundtable, and work with each to host an event during the year.
- The call center is promoted through on-line through their website and social media, as well as through food pantries, drive-through vaccine sites, clinics, health department, and other community locations. They also use a flyer to promote services and are looking at increased outreach efforts that could include billboards and additional outreach materials.

## Summary – Strengths, Weaknesses, Opportunities and Threats

As indicated in this technical memorandum, an abundant amount of input, information, and data was gathered at the outset of the study. Based on the historical review of the regional call center, and important feedback received through numerous interviews and meetings with key stakeholders in the region, this section summarizes the strengths, weaknesses, opportunities, and threats that were expressed by regional stakeholders or observed by the study team. These areas will serve as the foundation in the development of alternatives and options that will be identified during the next phase of the study.

## Strengths

- There is a genuine and overriding interest from key stakeholders and organizations in meeting mobility challenges in the region.
- The existence of the Regional Coordinated Council (RCC), the Steering Committee, and the mobility manager meetings facilitated by OMEGA allows for multiple meeting and coordination opportunities.
- OMEGA has done a great job of connecting the mobility managers in the region, providing a foundation for ongoing discussion on broader mobility issues and challenges in the region. Mobility managers work well together to coordinate inter-county rides and to reduce costs to the customer.
- The call center staff works very hard to find a solution and to meet needs. They are go-getters for challenging cases. Community health workers at the call center are equipped to address a variety of needs.

## Weaknesses

- Numerous stakeholders outside MOMS expressed a lack of transparency in the day-to-day operation of the call center, and it was noted that the communication between the call center and county mobility managers is lacking. While the COVID-19 pandemic may be a factor in this issue, there appears to be an overall breakdown in information sharing and communications between SEAT/MOMS and other stakeholders in the region.

External stakeholders also noted that it seemed no one outside of SEAT felt like they are involved in the operations of the regional call center. Some feedback indicated that since January 2020, for trips that cross county lines, there does not appear to be coordination between the call center and mobility managers in other counties. There needs to be a structure that allows for regular reporting and follow-up on services provided.

- The current call center structure is seen as complicated, and stakeholders outside MOMS find it challenging to understand the center's roles and responsibilities. There may be misperceptions or misunderstandings about call center structure and functions that are not addressed through current communication channels. An overall uncertainty on functions of regional call center, and how it can best support mobility managers in the region and the overall mobility management structure, was expressed.
- In discussions with the mobility managers and key stakeholders in the region, there was no consensus on the actual functions for the call center, and how the intake, referral, and trips scheduling process should be handled.

- Even though several mobility managers in the region are SEAT employees, there appears to be a disconnect between mobility management and call center functions in the region. It is not clear what duties the call center fulfills as compared to a mobility manager. The regional call center has gone in a different direction with the use of community healthcare workers, though it was noted that call center employees acting as health care workers, do provide “above and beyond” assistance.
- There was a perception from stakeholders outside MOMS that the call center was focused primarily on the SEAT service area, and rarely refers trips to counties not served by SEAT.
- Call center staff may not be fully aware of local expressions for landmarks in areas outside the SEAT service area, making trips throughout the region more challenging to coordinate and provide.
- The MOMS name (“Mid-Ohio”) is a marketing weakness and problematic for counties in eastern Ohio. In particular, the name may be an impediment to seeking local funding from jurisdictions located along or near the West Virginia border.
- In the SEAT service area it was reported that use of the call center initially took off, helped through SEAT staff participation on local committees and by interest in the call center from other community organizations. SEAT noted that the call center wasn’t just filling gaps in transportation; it also began helping with other social service barriers. However, the call center has never developed a regional focus as originally planned.

## Opportunities

- While there are multiple committees and groups that provide opportunities for discussion on mobility issues in the region, a forum is still lacking that would allow stakeholders to discuss and address areas specific to the regional call center. A previous attempt to provide regional input through an elected advisory panel to the call center was rejected by the MOMS board, eliminating the opportunity for viewpoints and input beyond members that are SEAT Board of Trustees or are SEAT employees. The current organization structure can be modified to ensure the call center represents the full region, and not just SEAT.
- Overall, there was support for the call center concept, and there is an opportunity to build upon the work so far to develop a model that fits the needs of the entire region. Possibilities expressed through the interview process include:
  - Relocating the call center to a more central location.
  - Employing staff from different areas in the region who may have a better understanding of local resources.
  - Assessing the ability for the call center to be community-based where calls could be handled remotely and a staff person could receive calls in their own county, rather than located physically at one location. Since current mobility managers are already busy and are often out in the community and not be available to answer calls, possibly local dedicated call takers are needed.

- CTS technology was obtained for the call center, but the system is not being used effectively to coordinate trip scheduling. The opportunity to utilize this software can be more fully explored.
- A regional resource guide, currently being developed by SEAT's mobility manager and OMEGA with input from all of the mobility managers in the region, will provide an online source of transportation resource information. The website will be a tool for the call center and the mobility managers, as well as outside agencies and individuals.
- The current call center location and organization structure can be reassessed. If the call center being located within a transit system is the preferred option, clearer separation of the transit system and call center leadership and administration is needed to ensure that the lines between call center employees and transit agency employees are not blurred.
- There needs to be more marketing across the region, especially in the counties not served by SEAT. Once the COVID-19 pandemic is no longer a barrier, an open house would provide mobility managers and other transit agencies an opportunity to see how the call center operates.
- There is the perception that policies and procedures are not applied consistently for each participating county in the call center, and not generally known. Current call center policies can be evaluated and protocols put in place to ensure consistency for each participating county.
- There is an opportunity for call center staff to be more fully educated on local and county-specific issues and eligibility characteristics or services that may vary from county to county. For example, in Belmont County, if a Medicaid applicant lists a car as an asset, Non-Emergency Medical Transportation (NEMT) isn't an option, regardless of whether or not the car functions. This may not be the NEMT policy in other counties.

## Threats

- The most critical threat, which arose as this document was being finalized, is that the call center is not being funded for CY2022 by ODOT. To maintain the call center operations beyond January 1, 2022, it will require a swift response by the MOMS Board or by other regional stakeholders. Recent call center staffing changes will also need to be addressed.
- Through the stakeholder interview process there was an ongoing uncertainty and uneasiness about the short and long term vision for the call center. While this study will provide recommendations for the future, it will be essential for key stakeholders to come together and develop consensus on a shared vision for the regional call center.
- SEAT has provided the required local match money for the call center, and therefore the call center has been more focused on SEAT staff, efforts, and service area. At the same time stakeholders in the region outside SEAT are expressing a need for transparency and greater involvement in the call

center operations. It is critical that a balance be found – through which the call center becomes a regional resource, though one that is funded on a more regional basis and whereby all jurisdictions that want to be served by the call center are providing fiscal support.

- It was reported that has been little or no direct communication between MOMS and regional stakeholders in the past year. While this may partly be due to the COVID-19 pandemic, it signifies a huge communication disconnect and potential turf issues that must be addressed – or there is limited opportunity for the call center to move forward and be successful unless a totally different structure is identified and implemented.
- There is a real or perceived perception that SEAT, as a larger transit system compared to other agencies in the region, is looking to take over their services. Similar to the communication issue this situation must be addressed for any future success of the call center.

## Next Steps

This technical memorandum will be distributed to the RCC for review and presentation at their September meeting. As noted in the Introduction, revisions and additions will be incorporated into a version that will ultimately be included as a chapter in the draft final report. The study team will then begin work on a second technical memorandum that will provide alternatives for improving call center effectiveness.

## Appendix A

# Memorandum of Understanding

- Between Tuscarawas County Committee on Aging, Inc. DBA Tuscarawas County Senior Center and South East Area Transit

# Memorandum of Understanding

Between

Tuscarawas County Committee on Aging, Inc.  
DBA Tuscarawas County Senior Center

and

South East Area Transit

This Memorandum of Understanding (MOU) sets for the terms and understanding between the Tuscarawas County Senior Center and the South East Area Transit to operate a call center under the 5310 Grant for Mobility Management.

## **Background**

Tuscarawas County Senior Center is the lead Agency for the Mobility Management project in Tuscarawas County. The Mobility Manager has been working with OMEGA and Regional Stakeholders on a Regional approach to coordinate transportation.

## **Purpose**

This MOU will provide a partnership between regional stakeholders for implementing a regional call center. The call center will be located adjacent to South East Area Transit's Transit Center located at 224 Main Street, Zanesville, Ohio 43701. All employee(s) and call center cost will be paid by South East Area Transit and invoiced to The Tuscarawas County Senior Center for reimbursement from 2019 Grant 5310 Enhanced Mobility of Seniors and Individuals with Disabilities Mobility Management. The Tuscarawas County Mobility Management Project will help oversee the call center and assist South East Area Transit as needed.

## **Reporting**

Tuscarawas County Senior Center reports to ODOT Office of Transit by the 15<sup>th</sup> of the month after the end of the quarter. South East Area Transit will send the invoice to Tuscarawas County Senior Center prior to the 15<sup>th</sup> of the month so all information can be collected and combined to submit one invoice. Once payment has been received from ODOT Office of Transit the Tuscarawas County Senior Center will send a check to South East Area Transit. 4<sup>th</sup> quarter 2019 invoices must to submitted prior to Feb 15, 2020.

**Funding**

The partnership between Tuscarawas County Senior Center and South East Area Transit for the regional call center will be funded from 2019 Grant 5310 Enhanced Mobility of Seniors and Individuals with Disabilities Mobility Management. This project will have a projected budget not to exceed \$45,811 Federal Dollars (80%) with local match of \$11,452 (20%) for a total project budget of \$57,264.

**Duration**

This MOU is at-will and may be modified by mutual consent of authorized officials from Tuscarawas County Senior Center and South East Area Transit. This MOU shall become effective upon signature by the authorized officials from Tuscarawas County Senior Center and South East Area Transit and will remain in effect until modified or terminated by any one of the partners by mutual consent. In the absence of mutual agreement by the authorized officials from Tuscarawas County Senior Center and South East Area Transit this MOU shall end on December 31,2019.

**Contact Information**

Tuscarawas County Senior Center  
Pam Ferrell  
Executive Director  
425 Prospect Street , Dover Ohio 44622  
330-364-6611  
330-364-9291  
pferrell@tuscsc.org

South East Area Transit  
Howard Stewart Jr  
Director  
375 Fairbanks Street, Zanesville, Ohio 43701  
740-454-8574  
740-454-7499  
director@seatbus.org

\_\_\_\_\_ Date:

Tuscarawas County Senior Center, Executive Director

\_\_\_\_\_ Date:

Howard Stewart Jr, Director

## Appendix B

# Memorandum of Understanding

- Between South East Area Transit and Mid-Ohio Mobility Solutions

**Memorandum of Understanding  
South East Area Transit  
and  
Mid-Ohio Mobility Solutions**

**I. PREAMBLE**

This agreement is made and entered into this **June 3, 2021**, by and between South East Area Transit, a regional transit authority as described in Chapter 306 Ohio Revised Code, hereinafter referred to as “SEAT,” and the Mid-Ohio Mobility Solutions, LLC, from now on referred to as “MOMS.”

The purpose of this agreement shall be to provide Fiscal, Management, and Administrative oversight services for MOMS for a **fee**.

**II. DURATION OF AGREEMENT**

This agreement shall be in effect beginning the **3<sup>rd</sup>** day of **June** and continue through the **30<sup>th</sup>** day of **June 2022**. The services shall be provided by SEAT and paid for by MOMS.

**III. TERMINATION**

Either party may terminate this agreement by submitting a 30-day advance written notice of its intent to discontinue said contract for transportation services.

In the event of termination, SEAT will be paid the agreed-upon rate for delivered services up to the termination date.

**IV. SCOPE OF SERVICES PROVIDED**

1. SEAT hereby agrees to oversee and manage MOMS and assume administrative, programmatic, financial, and legal responsibility for the requirements of funding organizations. SEAT agrees to implement and operate Mid-Ohio Mobility Solutions in accordance with the terms of this agreement and with any conditions imposed by the funding organizations.
2. Mid-Ohio Mobility Solutions shall be operated in a manner consistent with its tax-exempt status and as described in this agreement. No material changes in the purposes or activities of Mid-Ohio Mobility Solutions shall be made without prior written permission of the MOMS Board of Directors and according to any requirements imposed by funding organizations, nor shall SEAT carry on activities or use funds in any way that jeopardizes MOMS’ tax-exempt status.
3. SEAT shall not, and shall not permit the Mid-Ohio Mobility Solutions to, attempt to influence legislation or participate or intervene in any political campaign on behalf (or in opposition to) any candidate for public office or otherwise engage in the carrying on of propaganda (within the meaning of section 501(c)(3) of the Internal Revenue Code of 1986).

4. Mid-Ohio Mobility Solutions will provide SEAT with reports describing programs and services of MOMS in accordance with the following schedule:

1. Monthly Basis

5. SEAT will prepare all reports, including interim and final reports, required by funding organizations with MOMS assistance and final approval.

6. On behalf of MOMS, SEAT will establish and operate for the use of MOMS a designated account ("Account") segregated from SEAT's books. All amounts deposited into a MOMS Account will be used in its support, less administrative charges, if any, and subject to the conditions set forth below.

7. SEAT will disburse funds from the Account in the following manner: (for example: as instructed in writing on properly filled-out SEAT vouchers accompanied by required documentation and only as authorized by this agreement.) Disbursements will be restricted to the support and implementation of the Project only.

8. MOMS Board of Directors designates **Howard Stewart, Jr.** to act as authorizing official. The authorizing official shall act as the principal coordinator of the MOMS daily business with the Fiscal Agent and shall have authority to sign disbursement requests and any other documents as directed by the MOMS Board of Directors.

9. SEAT and MOMS will maintain all financial records relating to MOMS according to generally accepted accounting principles, retain records as long as required by law, and make records available to auditors as required by law.

10. MOMS will reflect the activities of MOMS, to the extent required, on their state and federal government tax returns and financial reports. All disbursements from an account shall be treated as payments made to or on behalf of the MOMS to accomplish the purposes of MOMS. MOMS will provide SEAT with proper documentation to accomplish this, including furnishing SEAT with MOMS' Federal Employer Identification Number

## **V. PAYMENT FOR SERVICES**

In consideration of SEAT's agreement to provide Fiscal, Management, and Administrative oversight services and to cover the SEAT's expenses in connection with MOMS as outlined above, MOMS will pay the following fees, charges, and expenses:

1. \$250 Per -Month

**VI. OTHER TERMS AND CONDITIONS**

**Amendments** - Any amendments to this agreement must be submitted in writing thirty (30) days to implement such agreement and shall be agreeable to all parties. Such amendments must be incorporated as written attachments to this Cooperative Agreement.

**Hold Harmless** - The Vendor agrees to hold SEAT harmless from liability resulting from the Vendor's acts or omissions, within the terms of this agreement; provided, however, the Vendor shall not hold SEAT harmless from any claims, demands, or causes of action arising in favor of any person or entity, growing out of incident to, or resulting directly or indirectly from the negligence of SEAT, its officers, agents, representatives, or employees.

**IN WITNESS WHEREOF**, the parties have executed this agreement as of the date last set forth below.

SOUTH EAST AREA TRANSIT

  
Howard Stewart, Jr

Transit Director

6/3/21  
Date

Mid-Ohio Mobility Solutions

  
Mid-Ohio Mobility Solutions Representative

6/3/21  
Date

# Appendix C

# Employee Loaning Agreement



## **SOUTH EAST AREA TRANSIT AND MID-OHIO MOBILITY SOLUTIONS MEMORANDUM OF AGREEMENT**

THIS AGREEMENT in consideration of the mutual promises, covenants, and agreements set forth herein is made and entered into by and between South East Area Transit, (“Loaning Employer”) and Mid-Ohio Mobility Solutions, (“Borrowing Entity”), who agree as follows:

**1. Recitals.** This Agreement is made with reference to the following background recitals:

a. Borrowing Entity desires a worker to perform the services and/or work described in Exhibit A, attached hereto and incorporated herein (the “Work”).

b. Loaning Employer employs \_\_\_\_\_ (the “Employee”), who possesses the appropriate education, skills and experience to perform the Work. Loaning Employer is willing to provide and loan the services of Employee to Borrowing Entity, and Borrowing Entity is willing to accept the Employee’s Work, on and subject to the terms of this Agreement.

c. The parties acknowledge that Loaning Employer is the general employer of Employee and, the Loaning Employer remains the general employer under the terms of this Agreement.

d. The parties acknowledge that loaning the Employee and this Agreement is in the best interest of both parties and fulfills the public purpose of the Loaning Employer.

### **2. Special Employment.**

a. Loaning Employer agrees to provide and loan the services of Employee to perform the Work for and on behalf of Borrowing Entity, and Borrowing Entity agrees to accept and utilize the services of Employee, as provided by this Agreement. When working for Borrowing Entity, Employee shall be under the supervision and direction of Borrowing Entity and its management and supervisory employees. Borrowing Entity shall determine the precise tasks, services and assignments that Employee will perform pursuant to this Agreement.

b. Employee shall work for Borrowing Entity during the hours or pursuant to the schedule described on Exhibit A. The hours or schedule may be modified by mutual written agreement of the parties. The parties recognize that workload requirements involving either Loaning Employer or Borrowing Entity may require temporary adjustments in Employee’s work schedule and the parties agree to mutually cooperate to accommodate such requirements.

c. Loaning Entity may provide Employee with office space. Borrowing Entity shall be responsible for providing Employee with support services, materials, supplies, tools and equipment appropriate to perform the Work. All correspondence, other documents, e-mail and other communications made by Employee in connection with the Work under this Agreement shall

be the property of Borrowing Entity and subject to its document retention, management and other applicable policies and regulations.

d. If Employee undertakes any business-related travel or incurs other business-related expenses in connection with the Work for Borrowing Entity, then Borrowing Entity shall be responsible for payment or reimbursement of Employee's business-related expenses in accordance with Borrowing Entity's expense reimbursement policy and procedures.

e. Borrowing Entity will perform annual performance reviews of Employee and be responsible for notifying Loaning Employer if performance of Employee is not acceptable.

f. Borrowing Entity will have authority to approve/deny paid time off requests of Employee. Employee will be responsible for using the electronic time keeping system of Loaning Employer to document time off requests for payroll purposes after they have been approved by Borrowing Entity. Loaning Employer will approve time off requests in the electronic time keeping system of Loaning Employer submitted by Employee. Through the submission of a leave request in the electronic time keeping system, Employee certifies that approval has been obtained by the Borrowing Entity.

**3. General Employer Responsibilities.** Employee will remain a full-time regular employee of Loaning Employer, will remain on Loaning Employer's payroll, will remain subject to Loaning Employer's general personnel administration, and will continue to receive compensation and benefits solely from Loaning Employer. Employee shall remain subject to Loaning Employer's personnel policies, rules and regulations. Loaning Employer shall be responsible for payment of all Employee salary and related benefits, pension, insurance, taxes and withholdings required under Loaning Employer's personnel rules, policies and contracts and applicable federal and state law. Loaning Employer shall be responsible for keeping and maintaining the personnel file and payroll and other records of Employee.

#### **4. Consideration.**

a. The Parties recognize that SEAT, the Loaning Employer, is a member of MOMS, the Borrowing Entity, and pays regular membership dues. During the time period that the Employee is on loan to the Borrowing Entity, SEAT's membership dues, special assessments, conference registrations, and other fees shall be waived.

b. The consideration listed in section 4(a) above is in exchange for all of the Loaning Employer's costs and expenses related to loaning the Employee to Borrowing Entity, including all payroll, benefits and workers' compensation related costs, exclusive of any costs listed in section 2 (d). The consideration by Borrowing Entity above shall be the sole and exclusive consideration paid to Loaning Employer.

**5. Term.** This Agreement shall commence on October 28, 2019 and terminate on October 28, 2021, unless earlier terminated by a party. This Agreement may be terminated at any time by either party upon 30 days advance written notice to the other party.

#### **6. Insurance.**

a. Workers' Compensation Insurance. Loaning Employer, at its sole cost and expense, shall procure and maintain for the duration of this Agreement workers' compensation insurance or self-

insurance covering Employee, in accordance with the requirements of Ohio law. The parties intend that this obligation constitute a valid and enforceable agreement by which Loaning Employer agrees to obtain, and shall obtain, workers' compensation coverage for the Employee provided to Borrowing Entity under this Agreement. Borrowing Entity therefore shall not be subject to civil, criminal or other penalties for failure to provide workers' compensation coverage or tort liability in the event of an injury to or illness of Employee suffered in the course of providing Work under this Agreement. Loaning Employer acknowledges that its workers' compensation insurer or self-insurer will be liable for the entire cost of workers' compensation benefits payable on account of an illness or injury occurring in the course of and arising out of the general and special employment of Employee under this Agreement.

b. Other Insurance. The Loaning Employer is a self-insured entity and able to cover the amounts listed below. The Borrowing Entity, at its sole cost and expense, shall procure and maintain for the duration of this Agreement the following types and limits of insurance:

<i>Type</i>	<i>Limits</i>
Commercial general liability	\$1,000,000 per occurrence & \$2,000,000 aggregate
Automobile liability	\$1,000,000 per accident

c. Proof of Insurance. Upon request, a party may request, and the other party shall provide a certificate or certificates of insurance evidencing the insurance required by this section.

## **7. Indemnification.**

a. Borrowing Entity shall indemnify, defend, protect and hold harmless Loaning Employer, and its officers, employees, volunteers and agents, from and against any and all liability, losses, claims, damages, expenses, demands, and costs (including, but not limited to, attorney, expert witness and consultant fees, and litigation costs) of every nature arising out of (i) a breach of Borrowing Entity's obligations under this Agreement or (ii) an act or omission of Employee in performing Work for Borrowing Entity under this Agreement, except (i) where caused by the sole negligence or willful misconduct of Loaning Employer, (ii) as otherwise provided by section 6(a), or (iii) as otherwise provided or limited by law.

b. The parties' obligations under these indemnification provisions shall survive the termination of this Agreement.

**8. Entire Agreement.** This writing represents the sole, final, complete, exclusive and integrated expression and statement of the terms of this contract between the parties concerning Employee's Work for Borrowing Entity, and supersedes all prior oral and/or written negotiations, representations or contracts. This Agreement may be amended only by a subsequent written contract approved and executed by both parties.

**9. Successors and Assignment.** This Agreement shall bind and inure to the benefit of the successors and assigns of the parties; however, Loaning Employer shall not change the Employee performing the Work under this Agreement without the prior written consent of Borrowing Entity.

**10. No Waiver of Rights.** Any waiver at any time by either party of its rights as to a breach or default of this Agreement shall not be deemed to be a waiver as to any other breach or default. No

payment by Borrowing Entity to Lending Employer shall be considered or construed to be a waiver of any breach or default.

**11. Severability.** If any part of this Agreement is held to be void, invalid, illegal or unenforceable, then the remaining parts will continue in full force and effect and be fully binding, provided that each party still receives the benefits of this Agreement.

**12. No Third Party Beneficiaries.** This Agreement shall not be construed to create any third party beneficiaries. This Agreement is for the sole benefit of the parties and no other person or entity shall be entitled to rely upon or receive any benefit from this Agreement or any of its terms.

**13. Notice.** Any notice, invoice or other communication that is required or permitted to be given under this Agreement shall be in writing and either delivered personally or sent by prepaid, first class U.S. mail addressed as follows:

Borrowing Entity Mid-Ohio Mobility Solutions, Inc. 224 Main Street Zanesville, Ohio 43701	Lending Employer: South East Area Transit 375 Fairbanks Street. Zanesville, Ohio 43701
--	---

Any party may change its address by notifying the other party of the change in the manner provided above.

\_\_\_\_\_  
BORROWING ENTITY  
MID-OHIO MOBILITY SOLUTIONS, INC.

\_\_\_\_\_  
LENDING EMPLOYER  
SOUTH EAST AREA TRANSIT (SEAT)

By:

By:

\_\_\_\_\_  
\_\_\_\_\_  
[name]  
\_\_\_\_\_  
[title]

\_\_\_\_\_  
\_\_\_\_\_  
[name]  
\_\_\_\_\_  
[title]

# Appendix D

## Mid-Ohio Mobility Solutions Operational Plan and Overview (2020)

**Mid-Ohio Mobility Solutions**  
January 2020 Operational Plan

**Operational Overview**

Mid-Ohio Mobility Solutions is currently operating as a brokerage call center from the hours of 8 am-4 pm Monday through Friday. One of MOMS objectives is to find the most cost-efficient and reliable transportation options for citizens within the OMEGA region. Mid-Ohio Mobility Solutions works with private, non-profit, RTA's, and for-profit companies.

During multiple counties coordinated plan updates, surveys, and conversations about gaps in services, it was noted that the public was looking for solutions of a twenty-four (24) hour a day, seven (7) day a week call center. The call center would coordinate for rides for the public, medical providers such as emergency rooms, and those with late work hours. Currently, no operation within the OMEGA Region operates as a call center outside of regular business hours.

This plan is designed to address gaps in service times and share coordination for all providers within the region.

**Functions and Capacity of Each Position**

**Objective of Staff:** Improve, educate partners and clients, improvise, develop, and create best solutions for Regional Coordination and inner-county transportation within 13 counties.

**Office Coverage:** Sunday-Saturday 8 am-4 pm

	Person 1		Person 2	
	Office Hours	On-Call Hours	Office Hours	On-Call Hours
Monday	8 am-4 pm	4 pm-8 am		
Tuesday	8 am-4 pm	4 pm-8 am		
Wednesday	8 am-4 pm	4 pm-8 am		
Thursday	8 am-noon		Noon-4 pm	4 pm-8 am
Friday			8 am-4 pm	4 pm-8 am
Saturday			8 am-4 pm	4 pm-8 am
Sunday			8 am-4 pm	4 pm-8 am

**Person 1**

Days: Monday 8 am- Wednesday 4 pm  
 Thursday 8 am- 12:00pm  
 On-Call Hours: 12 Total Hour Pay

**Person 2**

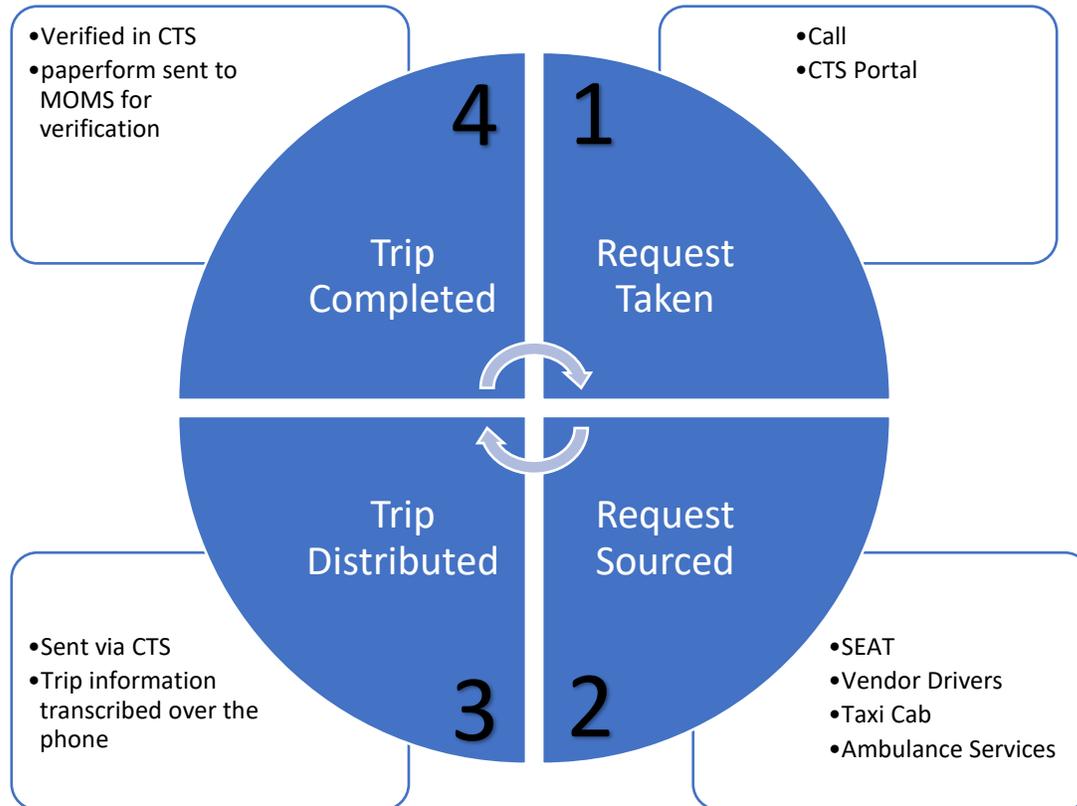
Days: Thursday 12 pm-4 pm  
 Friday 8 am -Sunday 4 pm  
 On-Call Hours: 12 Total Hour Pay

**Mid-Ohio Mobility Solutions**  
January 2020 Operational Plan

**Technology**

Trip Technology: CTS TripMaster

Message Communication: ICQ Messenger

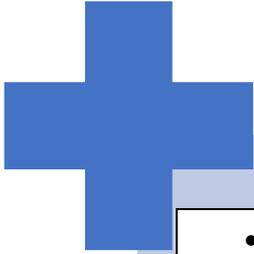


**GOALS**

- 1. Open public service up 24 hours a day/7 day a week**
- 2. Create coordination between agencies and providers**
- 3. Expand MOMS**
- 4. Coordination of more scheduled rides**
- 5. Expand multi-county trips**
- 6. Open night hours for emergency room discharges**
- 7. Expansion on marketing**
- 8. Create a smooth brokerage process**
- 9. Eliminate duplication of services**
- 10. Create county structure and process within each county**

**Mid-Ohio Mobility Solutions**  
January 2020 Operational Plan

**Projected Outcome of Adjustments**



- Provide community and agency non-stop service
- Cut barriers of office hours
- Align with Medicaid and ODOT expectations
- Create a good streamline for projected CTS Tripmaster's technology platform
- Easier for public
- Coordination with more agencies and counties

- Modification of budget
- Call volume low
- Not enough advertising
- Lack of provider participation
- Struggling to get provider buy in
- Struggle to find agencies for after normal business hour calls

# Appendix E

## South East Area Transit Job Description – Transportation Specialist

# South East Area Transit

## Job Description

### TRANSPORTATION SPECIALIST

#### **Job Statement:**

A Transportation Specialist is to provide dependable and reliable transportation information to consumers and clinical staff, coordinate the spectrum of transportation services for the agency, and document activities per current standards of practice.

**Job Classification:** Hourly/Non-Exempt

**Supervisor:** Operations Director

#### **Job Duties:**

- Responsible for intake of transportation related calls to the agency
- Communicates with transportation providers, consumers and other agencies in regards to setup of transportation services for eligible individuals according to established program standards.
- Inputs required reporting information into agency reporting software.
- Updates transportation website and social media accounts as necessary under the direction of Mobility Manager
- Assists consumers with verifying services that have been authorized/scheduled for them.
- Complete case note documentation in compliance with Agency policy for all contacts with and on behalf of consumers.
- Assist with assigned duties in other offices as needed/requested.
- Perform all duties in compliance with Agency policies, procedures, and a code of conduct that represents the Agency with pride.
- Ability to accurately look-up, retrieve, and enter data.
- Ability to work independently.
- Ability to comprehend written and verbal instructions.
- Ability to operate and maintain office equipment.
- Ability to implement a reasonable course of action based on available information.
- Ability to establish and maintain effective working relationships with staff, consumers, and associated businesses/organizations.
- Ability to effectively communicate in person and over the phone with the aged and disabled population.
- Ability to multi-task: efficiency and organization skills a must.
- Ability to accurately document facts related to essential job functions.
- Ability to sell transportation providers tickets to consumers

**Job Requirements:**

- Attitude conducive to Agency mission and goals;
- High school diploma or equivalent
- Ability to operate a computer to perform essential job functions including: proficient typing skills and knowledge of Microsoft Windows, Word, Excel, Access.
- Must have a valid driver’s license, access to an automobile, and automobile insurance meeting the minimum requirements of state law.
- Must have a telephone.
- Final candidate must agree to a BCI Criminal Records Check, which includes fingerprinting and pre-employment Drug and Alcohol Screen.
- Ability to lift and carry office equipment and supplies such as laptops, portable copiers, and medical records as needed to perform essential job functions.
- Adheres to consumer privacy and HIPAA regulations.
- Physical presence in the office is an essential function of the job.
- This position is directly responsible to the Mobility Manager/Operations Director
- Performs all other duties as deemed necessary by the Mobility Manager/Operations Director

**Bargaining Position?** No  
**Working Conditions:** 100% Indoor  
**Supervisory Responsibilities:** None

Created: June 20, 2019

By signing below, I agree to perform all duties as listed and state that I meet the minimum requirements as stated above.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

**We are an Equal Opportunity/Affirmative Action Employer**