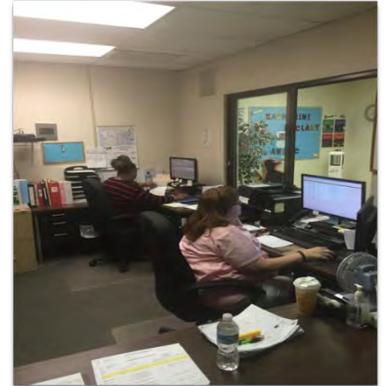


# OMEGA Regional Transportation Call Center Model Feasibility Study



## Final Report

*January 2022*



Bethesda, MD | Austin, TX | Seattle, WA

# Chapter 1: Introduction

This report is the culmination of technical assistance provided to the Ohio Mid-Eastern Governments Association (OMEGA) and regional stakeholders 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 provided the opportunity to evaluate the existing center and to produce a plan for improving future use and effectiveness.

The technical assistance documented in this report involved:

- A 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. including current services, organizational structures, and technology.
- Interviews with key stakeholders in the region that offered the opportunity to obtain thoughts on the strengths of the current call center and potential improvements, and to discuss their overall vision for the call center. These interviews included:
  - 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
- An interview with the 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.
- An interview with 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 a region adjacent to OMEGA.
- Multiple presentations to the Regional Coordinated Council (RCC), the OMEGA Steering Committee, and the Regional Council of Mobility Managers that provided the opportunity to review obtain input on the current call center and possible modifications or improvements.
- Development of various options for consideration by regional stakeholders. These alternatives were developed based on the current conditions in combination with the study team’s knowledge of mobility management efforts and one-call center implementations across the country.

## Report Contents

The remaining report is presented in the following order:

- **Chapter 2: Assessment of Existing Regional Call Center** provides a 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.
- **Chapter 3: Considerations for Improving Regional Call Center Effectiveness** outlines a variety of alternatives to improve the administration and operations of the call center based on the review of existing conditions and input from regional stakeholders.
- **Chapter 4: Implementation Plan** takes into account input on the alternatives and presents a proposed vision for the regional call center moving forward.
- Various documents referenced throughout the plan are included in the Appendix.

## Chapter 2:

# Assessment of Existing Regional Call Center

## Introduction

This chapter provides a 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 key stakeholders in the region that was noted in Chapter 1.

## Background

In 2018 the Tuscarawas County Committee on Aging, Inc. submitted an application to ODOT for a grant through the Ohio Mobility Management Program. The 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 2-1. While there were discussions about a regional approach to the required matching component to the application, eventually SEAT provided the required 20% match.

**Table 2-1: 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:

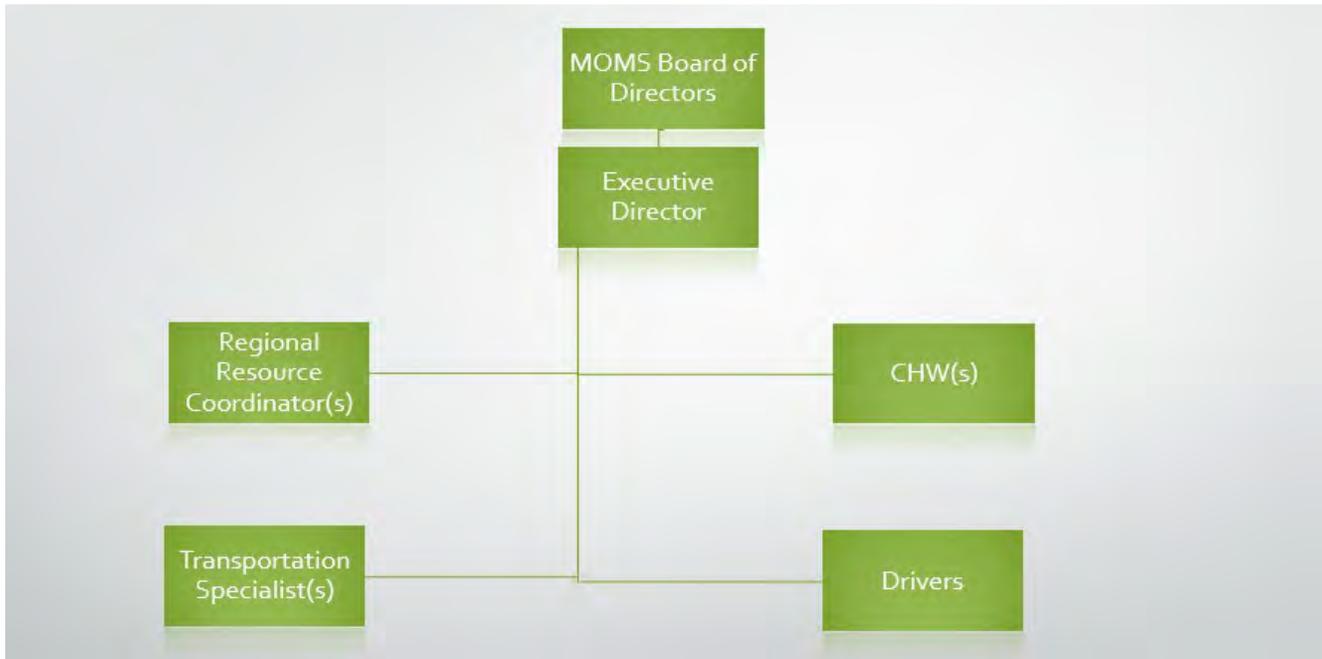
- To help close transportation barriers and gaps, by expanding services and providing more transportation options for older adults, individuals with disabilities, vulnerable families and general public population, by providing education, information and solutions to the barriers. This will aide in meeting 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 2-1.

**Figure 2-1: 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 2-2 and 2-3. As indicated these budgets include the call center and a mobility manager position as one project.

**Table 2-2: Regional Call Center - 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 2-3: Regional Call Center - 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 2-4 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 2-4: 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.

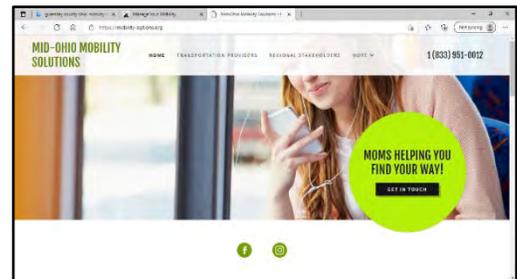
## 2020 Operational Plan

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 regional call center has been 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 would have been 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 2-5. It should be noted that the call volume was impacted by the COVID-19 pandemic. 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 2-5: 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 2-6. 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 since that time. Overall, through November the call center has received 450 calls in 2021.

**Table 2-6: Call Volumes for 2021 (Through November)**

2021	Monthly Total
January	66
February	29
March	81
April	110
May	46
June	27
July	16
August	21
September	15
October	22
November	17
<b>Total</b>	<b>450</b>

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 their transportation program discontinued.

- 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

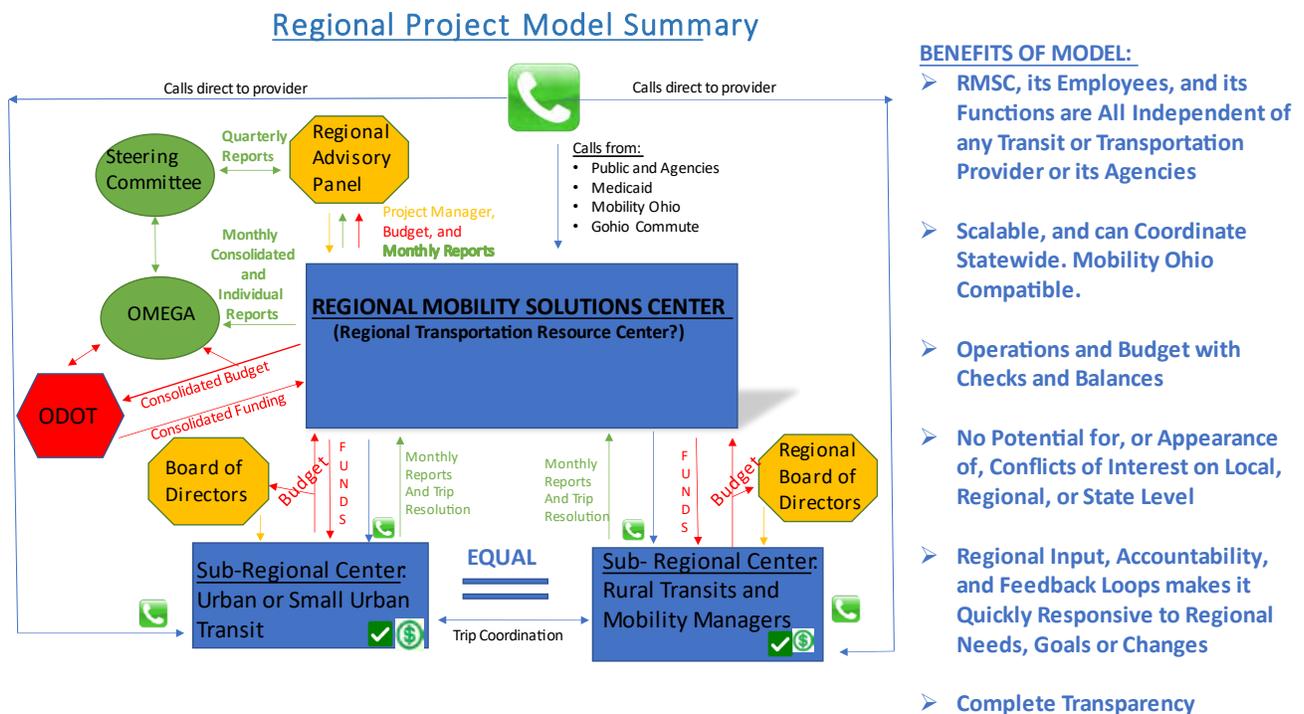
- Input at All Levels from Region
- Transparency
- Feedback Loops
- Checks and Balances
- Accountability at Multiple Points

## 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 2-2, 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 2-2: 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 was working with the mobility manager for Muskingum and Guernsey Counties on a regional resource guide. This guide is now available online at <https://region9resourceguide.com> and includes transportation options available by county in the region. OMEGA houses the site for purposes of continuity, but the mobility manager for Muskingum and Guernsey Counties operates the site.



Through the interviews stakeholders expressed support for the regional resource guide, and that it will be a useful tool. The use of the regional resource guide was taken into account in the development of recommendations on call center functions and operations that are discussed later in this report.

## Lessons 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 the Department of Job and Family Services (JFS).
- The call center director is a shared employee (she supervises the Non-Emergency Medical Transportation (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 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 chapter, 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 served as the foundation in the development of alternatives and options that are discussed in subsequent sections of this report.

### 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 advisory panel to the MOMS board was not successful. 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 that was recently 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, 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 there 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.

## Chapter 3:

# Considerations for Improving Regional Call Center Effectiveness

## Introduction

Based on the review of existing conditions this chapter outlines a variety of considerations for improving call center effectiveness. This section begins with proposed guiding principles that will help lead the regional call center in the future, and that were reviewed and agreed upon by regional stakeholders. Then various considerations are discussed incrementally, though many are interrelated. For instance, the call center operating hours will impact the staffing plan. However, for review the various considerations are presented by the following categories:

- Organizational Structure
- Staffing
- Center Location
- Functions
- Technology
- Marketing/Branding
- Monitoring and Evaluation
- Timeline and Phasing
- Funding and Financing

This chapter also includes information gained through the study team's work with other communities across the country, and through on-line research. This research included the National Center for Mobility Management that serves as a national technical assistance center, and whose resources include a One Call-One Click Transportation Services Toolkit.

Input from regional stakeholders was used to determine the preferred alternatives that then became the focus of the implementation plan that is detailed in Chapter 4 of this report.

## Guiding Principles

Through the multiple project meetings and stakeholder interviews there were consistent themes that could serve as guiding principles in the future administration and operation of the regional call center. Guiding principles are especially useful when stakeholders are working together on a shared vision going forward. The proposed guiding principles are:

- There should be full transparency in the operation of the call center, and a structure in place that allows for ongoing involvement from regional stakeholders beyond the lead agency.

- The call center should build upon the mobility management positions already in place, support the county-based mobility managers, and incorporate mobility management concepts (such as the focus on the customer) in call center services.
- The regional call center roles and responsibilities should be clear, and all stakeholders should be able to easily understand the center's roles and responsibilities.
- Individual stakeholders have their own issues related to transportation, so the overall broader efforts should take this into account and should not lose sight of an agency's specific needs.

## Organizational Structure Considerations

### Lead Agency Alternatives

A vital component in the operation of a regional call center is a lead agency that has the availability, willingness, organizational structure, capacity, and regional support to manage and oversee the center. A variety of entities can be the lead agency, as no one institutional home or organizational model has been identified as being required to achieve success. Across the country a variety of organizational arrangements can be found leading call centers or one-stop transportation services.

Taking into the account the variety of organizations that can lead call centers, along with the work conducted specific to the region to this point in the study, the following section discusses the potential organizational structure options for the future along with a specific consideration.

- **Existing or new nonprofit agencies**, either as a function within a multi-purpose nonprofit agency or as a stand-alone agency, can serve as the lead organization. These agencies have a vested stake in effective mobility and transportation in a community or region, wanting to ensure the people they serve can access needed services. They also have important experience administering grants, managing program services, and counseling clients and customers. If needed the creation of new nonprofit organization can be considered, particularly if there is no consensus on a specific agency or if there is a need for one that is seen as a fully neutral entity.
- **Public transit systems** typically have the organizational structure that is already designed and operated to handle calls from the community seeking assistance with transportation. In addition, as noted by the NCMM transit agencies can benefit from cost efficiencies derived from a call center through improved coordination and technology that can increase ridership by filling empty seats in existing vehicles and reducing duplication of services.
- **Local governmental agencies** that provide employment support and public assistance services, many that cannot be accessed without reliable and dependable public transit and human services transportation. are also a possible lead agency. Similar to nonprofit organizations these agencies

also have a vested stake in the operation of an effective call center that connects residents of the region with their mobility options. Often these governmental agencies are also familiar with operating call centers through similar job center and other locations that provide information to the public. In addition, as a section of local government they typically have additional organizational structure support provided through finance, human resources, and other departments.

- **Planning agencies** also have the organization capacity to lead a call center effort, as typically they manage a variety of different programs and services. However, as a planning agency they are usually more suited for the administrative functions of the call center, not the actual operations. As a result, planning agencies may be the lead, but then may consider contracting out operation of the call center to another entity.

**Organization Structure Considerations:** While other agencies and organizations have the structure to lead the regional call center in the future, Access Tuscarawas (Access Tusc.org) has reported a strong willingness to take on this role. Some advantages to this arrangement include:

- The agency was specifically formed to serve as a collaborative effort between numerous organizations, and to connect the community to the services they need.
- Access Tusc is a multi-purpose agency with the administrative capacity to manage the call center and serve in a lead role.
- As a parent organization of multiple community programs Access Tusc is familiar with the responsibilities in overseeing a variety of services and the need to work with a variety of different stakeholders.
- Access Tusc staff have experience in mobility management efforts in the region, and the agency embraces the customer focus and other key concepts of mobility management.
- The agency has the financial capacity to lead the regional call center in 2022, and the administrative capacity to pursue new funding to support future operations and possible expansion of the regional call center.
- Access Tusc has the technology capacity to lead the call center in the future.

These considerations are noted as appropriate in subsequent sections of the technical memorandum, and further detailed in the implementation plan provided in Chapter 4 of this report.

## Agency Roles

While ultimately one agency must lead the regional call center, other organizations would still have critical roles in this effort and a structure developed that provides for this relationship. This arrangement is especially important based on the assessment of current conditions, through which several stakeholders felt removed from the regional call center efforts and expressed concerns about a lack of transparency in call center operations. While a variety of other aspects related to the regional call center's future are discussed in this document, this issue is an important one and should be addressed to ensure the potential for success.

With that said, these are the proposed responsibilities in the administration and operations of the regional call center:

### Lead Agency

#### Administration

- Hire, train, house, and supervise staff for the call center (the next section provides additional information on proposed staffing), or alternately contract with another organization to operate the call center.
- Maintain budget and monitor operating expenses for the call center
- Research funding programs (more information in a later section on Funding) and submit appropriate applications
- Monitor and evaluate call center services and produce appropriate reports
- Identify additional opportunities to expand call center functions, i.e., one-click services
- Ensure grant / compliance requirements are met
- Procure needed technology, to include computers, telephone system, database, website, and as needed scheduling and dispatch system
- Provide office space to house call center staff, furnishings, and equipment
- Coordinate ongoing advisory group
- Coordinate with mobility managers in the region
- Coordinate with partners to market the call center
- As needed modify agency bylaws to encompass call center responsibilities and to ensure full involvement of regional stakeholders

#### Operations

- Counsel customers on trip planning and determination of eligibility for services
- As appropriate schedule trips through the call center
- Utilize the regional resource guide, and as needed coordinate with mobility managers in region to maintain and update database of current transportation services
- Develop appropriate forms in consultation with other partners
- Identify opportunities to streamline eligibility processes
- Provide information and referral to other services as appropriate

## Support Agencies

Regional agencies and organizations that are not the lead for the call center still have critical support roles in the success of a regional call center. These efforts would include collaborating on outreach and the marketing of the call center services; sharing information that will help call center staff in the administration and operations; and serving in an overall advisory capacity.

While multiple committees and groups are in place in the region that provide opportunities for discussion on mobility issues, a formal committee specific to the call center is needed that allows stakeholders to provide their input and to address areas related to the call center. More details on the membership of this proposed committee are provided in the implementation plan that is found in the next chapter of this report.

## Formal Agreement

Chapter 2 noted that there are several agreements in place, one between Tuscarawas County Committee on Aging and SEAT, and another between SEAT and MOMS. However, moving forward it will be important to have broader agreements in place that fully encompass stakeholder organizations. This formal agreement would include information on how the partners will work together and detail their roles of responsibilities. The formal agreement should include:

- A description of each partner agency
- The purpose of the MOU or agreement
- A description of the agreed upon roles and responsibilities each organization, what each agency will be providing to ensure project success, and how the roles and responsibilities align with project goals, objectives and target outputs
- Agreed upon policies and procedures
- Information on the resources each partner would contribute to the project (i.e., time commitment, in-kind contributions, or grant funds)

A sample MOU in the planning of a call center in another state is provided in Appendix F. This example can be used as a template for one specific to the region.

## Staffing

Staffing considerations are a key aspect of the regional call center in the future, particularly in light of the staffing changes that have occurred while this study was being conducted. There are two major components related to staffing – administrative responsibilities and operations of the regional call center.

## Administration

No matter the selected organizational structure to lead the call center in the future, there will need to be a staff position with the time to dedicate to the administration of the center. In support of the overall administrative role for the lead agency discussed earlier, specific duties will include:

- Working with stakeholder to finalize the MOU detailing roles and responsibilities of each agency.
- Establishing a call center advisory committee, and facilitating meetings.
- Confirming operational considerations for the one-call center, including staffing and technology.
- Working with regional stakeholders to developing a marketing and branding campaign.
- Developing budgets for the one-call center and submitting appropriate funding applications.
- Representing the call center by attending appropriate meetings with local agencies and other stakeholders.
- If call center operations will be in-house, hiring and training one-call center staff.
- If call center operations will be in-house, preparing workstations and technology at the one-call center location.
- If call center operations will be contracted out, preparing the request for proposals and procuring the organization that will operate the call center.
- If call center operations will be contracted out, administering and overseeing the contract.
- Monitoring one-call center services.
- Preparing reports on the call center required for each grant that funds it.
- Preparing for additional call center responsibilities, i.e., one-click on-line services.
- Identifying greater coordination and streamlining of services between transportation providers in the region.
- Identifying additional partnerships with other agencies.

## Operations

As noted in Chapter 2, call volumes peaked in April and have dropped since that time. As a result, it is anticipated that only one part-time staff person will be needed initially to staff the call center. With a renewed marketing and outreach efforts it is then expected that call volumes will increase, and additional staffing will be needed. This projection will be taken into account in the potential phasing and budgeting sections that are provided in the next chapter of the report.

This projected staffing plan would be similar to one-stop transportation centers implemented in areas similar to the region. For instance, ACCESS Allegany (NY) provides a one-call transportation center that offers information on a variety of transportation options. This program began with the hiring of a mobility management planner who oversaw the development of the one-call transportation center. Now, on a typical day three personnel staff their call center.

This proposed staffing plan would provide basic call center coverage, however ultimately there will be additional considerations.

- It is anticipated that hours would initially be limited to the availability of the part-time staff person, with staffing beyond these hours needing to be considered along with appropriate back-up staffing to fill in for hours and days when that person is not available.
- Outreach is an integral component of the regional call center, as services need to be marketed to individual customers and to staff of agencies and organizations who work with people with limited mobility options, employers, and other key community stakeholders. While mobility managers will have a key role in this effort through work in their community and their networks, it is anticipated that call center staff can also play a major role through their ongoing phone coverage and possible marketing of services through social media, e-mail campaigns, and public service announcements, and other outreach efforts that can be coordinated from the call center.

Mobility management services beyond the call center will obviously impact staffing. In coordination with the current mobility managers and OMEGA, the call center staff may have involvement within transportation orientation workshops, land use issues that affect mobility, in coordinated transportation planning efforts, and in coordination efforts with human service transportation providers.

## Regional Call Center Location

The regional call center is housed at SEAT through the end of CY2021. Looking ahead, a variety of options could be considered that include maintaining the call center in a physical location or using a virtual option through which call center staff would work remotely from separate locations.

Along with Access Tusc's interest in serving as the lead agency they have identified spaces within their current location that could house the regional call center in the future. One of the advantages of this arrangement over virtual options/remote workers is that as staff are added to the call center operations they can interact with each other and consult with one another when formulating and developing trip plans for customers with mobility needs. Additional details on the potential regional call center location are included in Chapter 4.

## Functions

Through previous discussions with the mobility managers and key stakeholders in the region there was no full consensus on the actual functions for the call center, and how the intake, referral, and trips scheduling process should be handled. With a possible transition of the call center to a different agency this provides the opportunity for a “reset”, and a renewed focus on the core functions of the regional call center along with a plan for additional responsibilities in the future. It is anticipated that:

- The primary function will be answering calls from customers through a central number, discussing their transportation needs and providing information on travel options.
- The call center staff will coordinate with mobility managers as needed to determine preferred travel options for specific customers.
- The call center will help to ensure consistency in the use of standardized policies and procedures in the region, such as the Regional Intake Form.
- In the future as technology efforts evolve, and as appropriate, schedule individual trips. Coordinating this transition will be a major component of the lead agency’s responsibilities. The transportation services currently operated by various providers will need to be integrated into regional scheduling software that will be required, and staff appropriately trained to be able to schedule trips on different services and to ensure a smooth transition.
- Additional activities and functions will be considered in the future in consultation with mobility managers and regional stakeholders, to include implementing a “one-click” option to the call center that allows customers to access information 24/7.

The full integration of the functions of the call center with current mobility management positions is a key consideration moving forward -- to ensure efficient use of resources, to reduce any possible duplication in staffing roles, and to avoid any confusion over roles. Following the development of the considerations discussed in this chapter a specific discussion was conducted with regional mobility managers on the future functions of the call center, and the results of this discussion are incorporated into the implementation plan in Chapter 4.

## Technology

CTS technology was obtained for the call center, but it was noted through the assessment of existing conditions that the system is not being used effectively to coordinate trip scheduling. Access Tusc is highly familiar with this software program, and this familiarity would be an advantage if they assume the lead role in the future. Additional information on the possible use of the CTS software is included in Chapter 4.

Beyond the scheduling software, technology considerations will include the phone system. As noted by the Community Transportation Association of America (CTAA), “scalability” and “interoperability” are important considerations when evaluating technologies for a one-call center. Scalability refers to the ability to easily increase the number of users of a particular technology. Interoperability refers to the ability of different technologies to work together or “talk” to one another. Access Tusc has indicated that their Voice over Internet Protocol (VOIP) phone system can easily be expanded to accommodate call center operations.

In regard to the possible one-click component related to the call center a variety of options are available, and possibly through the existing software. Other considerations include simply adding information to the current Access Tusc or OMEGA websites, setting up a separate website for the call center, building upon the recently completed Region 9 Resource Guide, or implementing a sophisticated site that offers information on providers and a trip planning functions.

## Marketing / Branding

As noted in the initial project document there was confusion over the name for the current call center, with the use of both the MOMS and Mobility Solutions Center. The transition of the regional center to a different entity provides the opportunity for consensus on one name.

Based on negative feedback on the “Mid-Ohio” component of the MOMS name, it is anticipated that moving forward the call center will be marketed as the Mobility Solutions Center. The logo developed for the Region 9 Resource Guide discussed in the previous chapter could be modified to create a similar logo for the Mobility Solutions Center, emphasizing that the resource guide is coordinated with the call center and maintaining branding consistency between the different efforts.

Whatever name is selected, the call center name and branding should be appropriate for all of Region 9. The name and branding should not be tied to the operating organization, so that branding remains consistent even if the operations are provided by a different organization in future years.

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 have dropped. It will be critical for project partners to work together to market the call center and ensure people in the community know it is available as a resource -- and to ensure potential funders and decision makers are aware of the impact it has in the community. The opportunities to evaluate and broadcast the importance of the one-call center are discussed further in the Monitoring and Evaluation section that follows in this document.

## Monitoring and Evaluation

Looking ahead there will need to be a greater emphasis on monitoring and evaluating the call center operations, especially if future funding is constrained for transportation projects and services. It will be critical to assess the effectiveness of the program, make modifications as needed, and report outcomes to partners and current and potential funders. Some considerations for this process include:

- Tracking and documenting call center services and outcomes. In addition to tracking number of calls received and individuals served, the call center should be following up on client to determine whether or not they were able to use the service (and the reasons if not). Such follow up will not only provide measures of services provided, but can also provide valuable feedback about call center's services as well as the transportation services used by call center clients.
- Assessing current conditions by identifying the level of awareness and information that customers and agency staff have about transportation services. This will help to identify the most critical issues around which marketing efforts should be focused and also provide a baseline to measure the effectiveness of the call center. Typically, this assessment is conducted through a survey or through discussions with partner agency staff to discuss their knowledge base and where they think assistance is needed.
- Through additional outreach and marketing, it is anticipated that the call volume will increase over time. It will be important to clearly demonstrate these results – particularly showing that more people are using available transportation services to access jobs, shopping, and other community locations that otherwise they would not be able to reach. A process will be needed to capture calls facilitated through the center or website hits through a one-click program, and then communicated to current and future funders in a clear and concise manner.
- Linking the call center activities to both real life situations through human interest stories and through the broader impact on the region as part of the “community infrastructure” when discussing the program with local partners.

## Using Qualitative and Quantitative Measurements

Assessing the performance of a call center and overall mobility management program involves both qualitative and quantitative measures, in part because the benefits and outcomes of the program will need to be conveyed to different audiences. Some people will want to see numbers and data, especially since the call center is connected to transportation services that need to report ridership and cost data. Other stakeholders will be interested in the impact of the call center on individuals in the community, and therefore will want stories and anecdotes that paint the picture of people who are directly benefitting from the call center efforts. Therefore the use of both qualitative and quantitative performance measures to provide a comprehensive picture of the program's success is important.

When assessing the overall benefits of the call center and mobility management services in the region, the following should be considered:

**Direct user benefits** -- Direct benefits from the call center for users through increased access to jobs, services and activities (i.e., medical services, employment, education facilities, shopping)

**Cost savings through support for public services** -- Support for other agency activities through the call center that helps reduce costs by:

- Allowing access to medical services and therefore avoiding more acute and expensive medical problems
- Helping reduce welfare dependency and unemployment
- Providing the ability to live independently and therefore reducing care facility costs

**Economic Benefits** -- How the one-call center increases economic and social opportunities for people who may be economically, physically and socially disadvantaged.

**Option Value Benefits** -- How the one-call center is an integral part of the community infrastructure, so that even if people are not currently using the service they place a value on it for having it available i.e., when a family member suddenly can no longer drive.

Overall, results regarding the call center and mobility management are obtained through these result-oriented questions:

- How is the service affecting the community?**
- How much of the population is being served?**
- What share of the needs are being met?**
- What are the economic impacts of the service?**

## Assessment through Connection to Established Goals and Objectives

Another consideration for evaluating the impact of the call center and mobility management efforts is to link this assessment to established goals and objectives. While the RCC and other local stakeholders should occasionally discuss and update goals and objectives for the call center and mobility management efforts, Table 3-1 proposes a series of goals and objectives. Table 3-2 then takes the proposed objectives and connects them to possible quantitative and qualitative measures for evaluating regional call center effectiveness.

**Table 3-1 Proposed Goals and Objectives**

Goals	Objectives
Focus on the Individual	<ul style="list-style-type: none"> <li>• Provide information on other transportation options and resources and refer customers to appropriate provider.</li> <li>• Schedule trips through multiple providers with one phone call.</li> <li>• Implement a “one-click” option to the call center that allows customers to access information 24/7.</li> <li>• Provide public information on transportation service options, including offering materials for those with language barriers.</li> <li>• Identify and facilitate new services to meet individuals’ needs.</li> </ul>
Improve Coordination	<ul style="list-style-type: none"> <li>• Continue current partnerships and establish new ones to coordinate transportation projects, planning, service, and expertise.</li> <li>• Identify opportunities to coordinate service delivery to close gaps or eliminate overlaps.</li> </ul>
Promote Accessibility and Livability	<ul style="list-style-type: none"> <li>• Monitor services to ensure they are accessible, lead to livable communities, and improve quality of life.</li> <li>• Consider the effect of land use design and development on the provision of transportation mobility and accessibility.</li> </ul>
Ensure Diversity in Products and Services	<ul style="list-style-type: none"> <li>• Ensure meaningful access to transportation service for older adults, people with disabilities, children and youth, individuals with lower incomes, and people with language barriers.</li> </ul>
Foster Education and Awareness	<ul style="list-style-type: none"> <li>• Educate health and human agency staff, workforce agency staff, policymakers, elected officials, and other stakeholders on availability and need for alternative transportation choices.</li> </ul>
Promote Financial Sustainability	<ul style="list-style-type: none"> <li>• Leverage funding and resources through partnerships.</li> <li>• Build a strong foundation for mobility management programs through funding and resource support.</li> </ul>

**Table 3-2 Proposed Objectives and Possible Performance Measures**

Objectives	Possible Performance Measures
<b>One-Call/One Click Services</b>	
<p>Schedule trips through multiple providers with one phone call.</p> <p>Provide information through one-call transportation center on available transportation resources and refer customers to appropriate provider.</p>	<p><u>Qualitative Measures</u></p> <ul style="list-style-type: none"> <li>• Increase in the range of transportation options and service providers available to current and new customers.</li> <li>• Expanded service area to include destinations where individuals need to go.</li> <li>• Expanded options for same day service.</li> </ul> <p><u>Quantitative Measures</u></p> <ul style="list-style-type: none"> <li>• Increase in calls to one-stop call center.</li> <li>• Increase in total passenger trips on available transportation services.</li> </ul>
<p>Implement a “one-click” option to the call center that allows customers to access information 24/7.</p>	<p><u>Qualitative Measures</u></p> <ul style="list-style-type: none"> <li>• Effective web site that provides access to information.</li> <li>• Greater use of social media and other efforts to ensure knowledge of one-click option.</li> <li>• Increase in the range of transportation options and service providers available to current and new customers.</li> <li>• Expanded service area to include destinations where individuals need to go.</li> </ul> <p><u>Quantitative Measures</u></p> <ul style="list-style-type: none"> <li>• Increase in website hits.</li> <li>• Increase in total passenger trips on available transportation services.</li> </ul>

Objectives	Possible Performance Measures
<p>Provide public information on transportation service options, including offering materials for those with language barriers.</p>	<p><u>Qualitative Measures</u></p> <ul style="list-style-type: none"> <li>Public information and transit customer information available in variety of formats, including published in other languages and consistent with Title VI Plans.</li> <li>Education programs provided to stakeholders, including elected officials, community organizations, health and human service agencies, and workforce programs.</li> </ul> <p><u>Quantitative Measures</u></p> <ul style="list-style-type: none"> <li>Expanded use of one call or one click services.</li> <li>Increase in number of passenger trips on services through targeted market areas for individuals with limited English proficiency or other language barriers.</li> </ul>
<p>Ensure meaningful access to transportation service for older adults, people with disabilities, children and youth, individuals with lower incomes, and people with language barriers.</p>	<p><u>Qualitative Measures</u></p> <ul style="list-style-type: none"> <li>Assessment of individual needs for specific target markets based on research and community outreach.</li> <li>Approved service plans that are responsive to individual needs identified in the assessment.</li> <li>Increase in the range of transportation options and service providers available to current and new customers.</li> <li>Services provided to ensure access for specific target markets.</li> <li>Expanded transit service area to include destinations where individuals need to go for retail, health, and other services.</li> </ul> <p><u>Quantitative Measures</u></p> <ul style="list-style-type: none"> <li>Increase in percent of households within ¾ mile of fixed route or flexible route transit in census blocks reflecting concentrations of target markets.</li> </ul>

Objectives	Possible Performance Measures
<p>Educate health and human agency staff, workforce agency staff, policymakers, elected officials, and other stakeholders on availability and need for alternative transportation choices.</p>	<ul style="list-style-type: none"> <li>• Expanded demand response transit service level (miles, hours) per capita in U.S. Census blocks (not served by fixed route or flexible route transit) reflecting concentrations of target markets.</li> <li>• Increase in passenger trips on services in targeted market areas.</li> </ul> <p><u>Qualitative Measures</u></p> <ul style="list-style-type: none"> <li>• Targeted marketing campaigns to promote mobility management services and need for mobility options.</li> <li>• Coordination with transportation providers on branding and marketing campaigns.</li> </ul> <p><u>Quantitative Measures</u></p> <ul style="list-style-type: none"> <li>• Number of presentations to agencies.</li> <li>• Number of community events attended.</li> <li>• Support for mobility management and variety of transportation options based on public opinion surveys.</li> <li>• Increase in total regional passenger trips.</li> </ul>
<b>Service Oriented</b>	
<p>Monitor transportation services and make modifications as needed.</p>	<p><u>Qualitative Measures</u></p> <ul style="list-style-type: none"> <li>• Increased knowledge of services in community.</li> </ul> <p><u>Quantitative Measures</u></p> <ul style="list-style-type: none"> <li>• Assessment of service through performance data:             <ul style="list-style-type: none"> <li>- Cost per Hour</li> <li>- Cost per Mile</li> <li>- Cost per Passenger Trip</li> <li>- Farebox Recovery</li> <li>- Passenger Trips per Mile</li> <li>- Passenger Trips per Hour</li> </ul> </li> </ul>

Objectives	Possible Performance Measures
<p>Identify and facilitate new services to meet individuals' needs.</p>	<p><u>Qualitative Measures</u></p> <ul style="list-style-type: none"> <li>• Increase in the range of transportation options and service providers available to current and new customers.</li> <li>• Expanded opportunity for residents to access key destinations.</li> <li>• Increased partnerships with public and private transportation providers.</li> <li>• Establishment of new programs to meet unmet transportation needs and fill gaps in current transportation options.</li> </ul> <p><u>Quantitative Measures</u></p> <ul style="list-style-type: none"> <li>• Expanded span of service through new services.</li> <li>• Increased service days per week through new services.</li> <li>• Increase in total number of trips provided in region as a result of new service.</li> </ul>
<p>Identify opportunities to coordinate service delivery to close gaps or eliminate overlaps.</p>	<p><u>Qualitative Measures</u></p> <ul style="list-style-type: none"> <li>• Integrated service agreements between providers to minimize duplication of service and expand opportunities for customers to transfer between services or access multiple providers.</li> </ul> <p><u>Quantitative Measures</u></p> <ul style="list-style-type: none"> <li>• Increase in number of connections between transportation providers.</li> <li>• Increase in number of shared passenger facilities.</li> <li>• Increase in number of passenger transfers between service providers.</li> <li>• Increase in total regional passenger trips.</li> <li>• Increase in the number of shared ride trips through greater coordination, particularly for out of county and regional trips.</li> </ul>

Objectives	Possible Performance Measures
<p>Monitor services to ensure they are accessible, lead to livable communities and improve quality of life.</p>	<p><u>Qualitative Measures</u></p> <ul style="list-style-type: none"> <li>• Increase in travel training services for older adults, individuals with disabilities, children, and youth.</li> <li>• Increase in the range of transportation options and service providers available to current and new customers.</li> <li>• Expanded service area to include destinations where individuals need to go for retail, health, and other services.</li> <li>• Increased options for same day service.</li> <li>• Increased options for safe walking and bicycling.</li> <li>• Increased opportunities for carpooling and vanpools.</li> </ul> <p><u>Quantitative Measures</u></p> <ul style="list-style-type: none"> <li>• Greater percent of households within ¾ mile of fixed route or flexible route transit service.</li> <li>• Increased number of trips on available transportation services.</li> </ul>
Partnerships	
<p>Continue current partnerships and establish new ones to coordinate transportation projects, planning, service, and expertise.</p>	<p><u>Qualitative Measures</u></p> <ul style="list-style-type: none"> <li>• Active leadership of regional coordinated planning efforts.</li> <li>• Improved connectivity between transportation providers to provide more seamless service.</li> <li>• Greater customer access to additional transportation services.</li> <li>• Joint fare programs to provide seamless customer service.</li> <li>• Regional driver training programs.</li> </ul> <p><u>Quantitative Measures</u></p> <ul style="list-style-type: none"> <li>• Increase in number of connections either between routes, modes, or service providers that maximize the trip-making options available to individuals.</li> <li>• Increase in number of purchases of service agreements.</li> <li>• Increase in passenger trips on coordinated transportation services.</li> </ul>

Objectives	Possible Performance Measures
<p>Consider the effect of land use design and development on the provision of transportation mobility and accessibility.</p>	<p><u>Qualitative Measures</u></p> <ul style="list-style-type: none"> <li>• Cooperative land use planning that includes transportation providers in the location of health and human service facilities, shopping centers, housing complexes, and other development that impacts need for expanded mobility options.</li> <li>• New residential or commercial/retail developments built within ¾ mile of existing transit services.</li> <li>• Adopted city ordinances setting standards to provide sidewalks for pedestrians to access transit stops.</li> <li>• Safe Routes to Schools program to encourage children to walk/bike to school.</li> </ul> <p><u>Quantitative Measures</u></p> <ul style="list-style-type: none"> <li>• Number of Memorandums of Understanding between providers and communities on land use involvement or design.</li> </ul>
<p>Leverage limited funding and resources through partnerships.</p>	<p><u>Qualitative Measures</u></p> <ul style="list-style-type: none"> <li>• Initiatives to encourage local government investment in transit programs.</li> <li>• Shared funding agreements between agencies and/or stakeholders for new service implementation.</li> <li>• Applications for new sources of funding.</li> <li>• Partnerships with private industry for funding support.</li> </ul> <p><u>Quantitative Measures</u></p> <ul style="list-style-type: none"> <li>• Increase in funding sources and amounts to support mobility management activities.</li> <li>• Increase in funding as compared to previous year.</li> <li>• Increase in local funding or through sources other than federal and state funds.</li> </ul>

Objectives	Possible Performance Measures
<p>Build a strong foundation for mobility management programs through funding and resource support.</p>	<p><u>Qualitative Measures</u></p> <ul style="list-style-type: none"> <li>• Education programs provided to stakeholders, including elected officials, community organizations, health and human service agencies, and workforce programs.</li> </ul> <p><u>Quantitative Measures</u></p> <ul style="list-style-type: none"> <li>• Increase in stakeholder involvement in regional coordinated planning efforts.</li> <li>• Increase in number of purchase of service agreements.</li> </ul>

## Timeline and Phasing

There are a variety of variables that will impact future planning for the call center, though based on current information and knowledge a conceptual timeline for the regional call center for the next five years is included in the implementation plan included in Chapter 4. The phasing is designed to indicate approximate timing and priority, and to take into account the relationship of any one element to another, time commitments, and potential funding availability.

## Funding and Financing

In conjunction with decisions related to the organizational structure to lead the regional call center is the process for applying for grants, advocating for funding, and managing the financing plan to support the system. The proposed formal advisory committee will also play a key role in this process.

While there are currently a number of unknown factors that will likely affect the projected expenses and funding, the implementation plan in the next section of this report provides a conceptual financing plan that can serve as the starting point moving ahead, along with potential funding options and cost allocation considerations.

# Chapter 4

## Implementation Plan

### Introduction

This chapter is the culmination of the assessment of the current regional call center, presenting a plan for implementing a more effective and unified call center moving forward. This plan takes into account the evaluation of existing conditions, and extensive input from regional stakeholders on the options for improving call center effectiveness.

In an effort to ensure the implementation plan can serve as needed as a stand-alone tool, there is some repetition from the previous chapter. This includes the presentation of the key components of the regional call center in a similar order, that while interrelated are presented in implementation steps by the same categories:

- Organizational Structure
- Staffing
- Center Location
- Functions
- Technology
- Marketing/Branding
- Monitoring and Evaluation
- Timeline and Phasing
- Funding and Financing

The following implementation plan discusses the potential transition of the regional call center to a specific lead agency, so that there is a foundation for decision making in the near future. However, the implementation plan is structured in such a way that other organizations could serve in this lead capacity if conditions change beyond the short-term timeframe.

### Organizational Structure

As discussed in Chapter 3, a vital component in the operation of a regional call center is a lead agency that has the availability, willingness, organizational structure, capacity, and regional support to manage and oversee the center. As also noted, a variety of entities can be the lead agency, as no one institutional home or organizational model has been identified as being required to achieve success.

Through the study process Access Tusc reported a strong willingness to take on this role, and based on subsequent discussions with the RCC and with local mobility managers there is consensus that Access Tusc has the support to take on the lead role.

In addition, through a separate discussion with Access Tusc leadership they confirmed their commitment to the lead role and to the responsibilities that would be taken on by the agency. Access Tusc noted that managing the regional call center fits perfectly with their mission, and would be administered as a separate program from their Bridges to Wellness and Access Tusc Transit programs.

Therefore, the implementation process related to organizational structure builds upon this arrangement and details the roles and responsibilities for Access Tusc during CY2022, as well as for mobility managers and other regional stakeholders. In subsequent years, a different organization could take on the role of the lead agency if regional stakeholders determine that a change is needed.

## Lead Agency Role

As the lead agency in CY2022 for the regional call center, Access Tusc's responsibilities would involve administration and operations.

### Administration

- Hire, train, house, and supervise staff for the call center (the next section provides additional information on proposed staffing)
- Maintain budget and monitor operating expenses for the call center
- Research funding programs (more information in a later section on Funding) and submit appropriate applications in collaboration with OMEGA
- Develop written policies and procedures (in collaboration with the mobility managers), including a complaint process
- Monitor and evaluate call center services and produce appropriate reports using the OMEGA form (provided in Appendix F)
- Identify additional opportunities to expand call center functions, i.e., one-click services
- Ensure grant / compliance requirements are met
- Procure needed technology, to include computers, telephone system, database, website, and as needed scheduling and dispatch system
- Provide office space to house call center staff, furnishings, and equipment
- Coordinate ongoing advisory group
- Coordinate with mobility managers in the region
- Coordinate with partners to market the call center
- Provide regional outreach and marketing through social media posts
- As needed modify agency bylaws to encompass call center responsibilities and to ensure full involvement of regional stakeholders

## Operations

- Maintain log of all incoming calls that is transparent to all mobility managers
- Determine if call can be handled by call center staff or should be referred to a mobility manager
- Refer caller to mobility manager in their county when appropriate; alert appropriate mobility manager through a messaging system (such as Slack or ICQ)
- Counsel customers on trip planning and determination of eligibility for services when appropriate
- Determine need for regional software upgrades, and as appropriate schedule trips through the call center
- Utilize the regional resource guide, and as needed coordinate with mobility managers in region to maintain and update database of current transportation services
- Develop appropriate forms in consultation with other partners, including the regional intake form (provided in Appendix G)
- Identify opportunities to streamline eligibility processes
- Provide information and referral to other services as appropriate
- Provide a backup call-taking function when mobility managers are on vacation or otherwise unable to answer the phone to respond to time-sensitive requests
- Assist with obtaining language translation for callers with limited English proficiency (LEP)
- Follow up with customers on whether or not they used the transportation services and satisfaction with call center services
- Receive and respond to complaints

## Mobility Managers Role

One of the critical action steps moving forward is to ensure the call center compliments and supports the work of the mobility managers in the region. Therefore, a specific discussion was conducted with the mobility managers to obtain their input that was incorporated into appropriate components of the implementation plan. Overall, the role of the mobility managers in regard to the call center will include:

- Handling calls referred by the regional call center
- Working with call center in the use of intake and other forms/processes to ensure consistency in the region
- Help staff the call center one day per month (or more frequently) during start-up
- Educating regional center staff on specific county nuances to help their overall understanding of the region. This could include mentoring while on-site at the call center.
- Serving on the advisory committee to the regional call center
- Assisting in the marketing and promotion of the regional call center availability
- Monitoring call center call log and alerts to the mobility managers
- Working with call center staff on possible future opportunities to schedule trips

## Support Agencies

Regional agencies and organizations that are not the lead for the call center still have critical support roles in the success of a regional call center. These efforts would include collaborating on outreach and the marketing of the call center services; sharing information that will help call center staff in the administration and operations; and serving in an overall advisory capacity.

While multiple committees and groups are in place in the region that provide opportunities for discussion on mobility issues, a formal committee specific to the call center is needed that allows stakeholders to provide their input and to address areas related to the call center. The advisory committee should consist of at least one representative from each county, and include the mobility managers in the region.

## Formal Agreement

Chapter 2 noted that there were several agreements in place during the development of this plan, one between Tuscarawas County Committee on Aging and SEAT, and another between SEAT and MOMS. However, moving forward it will be important to have broader agreements in place that fully encompass stakeholder organizations. These formal agreements would include information on how the partners will work together and detail their roles of responsibilities. The formal agreement should include:

- A description of each partner agency
- The purpose of the MOU or agreement
- A description of the agreed upon roles and responsibilities each organization, what each agency will be providing to ensure project success, and how the roles and responsibilities align with project goals, objectives and target outputs
- Agreed upon policies and procedures, including complaints will be handled
- Information on the resources each partner would contribute to the project (i.e., time commitment, in-kind contributions, or grant funds)

The sample MOU noted in Chapter 3, and included in Appendix H, can serve as a template in the development of an agreement for the call center moving forward. It is anticipated that one of the key topics for the initial meeting of the regional call center advisory committee will be items to be included in a MOU using this template. As the lead agency Access Tusc will then be responsible for drafting the document, and working with the advisory committee to obtain their input and to finalize the MOU. The MOU could be a signal document signed by all partners, or a separate between the lead agency and each partner in the call center.

## Staffing

Staffing considerations are a key aspect of the regional call center in the future, particularly in light of the staffing changes that have occurred while this study was being conducted. There are two major components related to staffing – administrative responsibilities and operations of the regional call center.

## Administration

No matter the selected organizational structure to lead the call center in the future, there will need to be a staff position with the time to dedicate to the administration of the center. In support of the overall administrative role for the lead agency discussed earlier, specific duties will include:

- Working with stakeholder to finalize the MOU detailing roles and responsibilities of each agency.
- Establishing a call center advisory committee, and facilitating meetings.
- Confirming operational considerations for the call center, including staffing and technology.
- Working with regional stakeholders to developing a marketing and branding campaign.
- Developing budgets for the call center and submitting appropriate funding applications.
- Representing the call center by attending appropriate meetings with local agencies and other stakeholders.
- If call center operations will be in-house, hiring and training call center staff.
- If call center operations will be in-house, preparing workstations and technology at the call center location.
- If call center operations will be contracted out, preparing the request for proposals and procuring the organization that will operate the call center.
- If call center operations will be contracted out, administering and overseeing the contract.
- Monitoring call center services.
- Receiving and responding to complaints.
- Preparing reports on the call center required for each grant that funds it.
- Preparing for additional call center responsibilities, i.e., one-click on-line services.
- Identifying greater coordination and streamlining of services between transportation providers in the region.
- Identifying additional partnerships with other agencies.

## Operations

As noted in Chapter 2, call volumes peaked in April 2021 and have dropped since that time. As a result, it is anticipated that only one part-time staff person will be needed initially to staff the call center. Through discussions with regional mobility managers they recommended that the call center hours initially should be from 9:00 a.m. to 3:00 p.m., Monday through Friday. With a renewed marketing and outreach efforts it is then expected that call volumes will increase and the call center would ultimately operate from 8:00 a.m. to 5:00 p.m., Monday through Friday and require additional staffing. These

considerations were taken into account in the potential phasing and budgeting sections that are provided later in this chapter.

This proposed staffing plan would provide basic call center coverage, however ultimately there will be additional considerations.

- It is anticipated that hours would initially be limited to the availability of the part-time staff person, with staffing beyond these hours needing to be considered along with appropriate back-up staffing to fill in for hours and days when that person is not available. Mobility managers could periodically staff the call center, providing a mentoring opportunity while assisting with answering calls.
- Outreach is an integral component of the regional call center, as services need to be marketed to individual customers and to staff of agencies and organizations who work with people with limited mobility options, employers, and other key community stakeholders. While mobility managers will have a key role in this effort through work in their community and their networks, it is anticipated that call center staff can also play a major role through their ongoing phone coverage and possible marketing of services through social media, e-mail campaigns, and public service announcements, and other outreach efforts that can be coordinated from the call center.

Mobility management services beyond the call center will obviously impact staffing. In coordination with the current mobility managers and OMEGA, the call center staff may have involvement within transportation orientation workshops, land use issues that affect mobility, in coordinated transportation planning efforts, and in coordination efforts with human service transportation providers.

## Regional Call Center Location

As discussed in Chapter 2, the regional call center is currently housed at SEAT. Looking ahead, a variety of options could be considered that include maintaining the call center in a physical location or using a virtual option through which call center staff would work remotely from separate locations.

Along with Access Tusc's interest in serving as the lead agency they have identified spaces within their current location that could house the regional call center in the future and these are pictured to the right. One of the advantages of this this arrangement over virtual options/remote workers is that as staff are added to the call center operations, they can interact with each other and consult with one another when formulating and developing trip plans for customers with mobility needs.



If needed as staffing is expanded in the future, Access Tusc has also identified an extra office space in their building. It should be noted that use of this space would require discussions with the current building landlord, and would involve associated rental costs.



## Functions

Through initial discussions with the mobility managers and key stakeholders in the region there was no full consensus on the actual functions for the call center, and how the intake, referral, and trips scheduling process should be handled. With a possible transition of the call center to a different agency this provides the opportunity for a “reset”, and a renewed focus on the core functions of the regional call center along with a plan for additional responsibilities in the future.

For the development of this implementation plan a specific meeting was conducted with the mobility managers in the region. This meeting provides an opportunity to determine the following functions that will be the key responsibilities of the regional call center, and will ensure the full integration of the functions of the call center with current mobility management positions; ensure efficient use of resources; reduce any possible duplication in staffing roles; and avoid any confusion over roles:

- The primary function will be answering calls from customers through a central number, discussing their transportation needs and providing basic information on travel options, and using the Resource Guide as appropriate. A script will be developed in consultation with mobility managers to ensure consistency.
- The call center staff will coordinate with mobility managers on calls that need specific information on services in a particular county, and send this information to the mobility managers for them to handle.
- The call center will help to ensure consistency in the use of standardized policies and procedures in the region, such as the Regional Intake Form and Google Docs.
- In the future as technology efforts evolve, and through as progressive process and as appropriate, schedule individual trips. Coordinating this transition will be a major component of the lead agency’s responsibilities. The transportation services currently operated by other providers will need to be integrated into the scheduling software, and staff appropriately trained to be able to schedule trips on different services and to ensure a smooth transition.
- Call center staff will work with mobility managers and other regional stakeholders on potential additional activities and functions, to include implementing a “one-click” option to the call center that allows customers to access information 24/7.

Through the discussion with the regional mobility managers these additional considerations were noted in regard to the functions of the call center and the employees that will staff:

- A platform such as ICQ or Slack should be used to facilitate communication between the regional call center and mobility managers.
- Call center staff should receive sensitivity training for their work that involves interactions with a variety of population groups.
- The regional call center should have a process in place for handling calls from non-English speaking customers, and as needed develop a Title VI plan that details how LEP populations will be served.

## Technology

CTS technology was obtained for the call center, but it was noted through the assessment of existing conditions that the system is not being used effectively to coordinate trip scheduling. Access Tusc is highly familiar with this software program, and this familiarity would be an advantage as there will need to be an assessment of regional software upgrades that allow coordinated trip scheduling.

One of the key responsibilities in the future work between the call center staff and the regional mobility managers will be how best to coordinate trips through the software. To make this work on a regional basis, the call center (and potentially all of the partner transit agencies) would ideally be able schedule a trip on another organization's services. At a minimum, the scheduling system needs to alert a transit agency whenever a trip is requested on their system, so that they can quickly approve the trip and notify the requesting organization that the trip has been scheduled. (Currently the CTS system does not issue such alerts). Enabling coordinated trip scheduling among the participants, building upon the current CTS technology, is anticipated to require a significant financial investment. The lead agency in conjunction with OMEGA will work to secure funding for robust regional scheduling software, potentially in conjunction with ODOT's Mobility Ohio initiative.

Beyond the scheduling software, technology considerations will include the phone system. As noted by the Community Transportation Association of America (CTAA), "scalability" and "interoperability" are important considerations when evaluating technologies for a one-call center. Scalability refers to the ability to easily increase the number of users of a particular technology. Interoperability refers to the ability of different technologies to work together or "talk" to one another. Access Tusc has indicated that their Voice over Internet Protocol (VOIP) phone system can easily be expanded to accommodate call center operations.

In regard to the possible one-click component related to the call center a variety of options are available, and possibly through the existing software. Other considerations include simply adding information to the current Access Tusc or OMEGA websites, setting up a separate website for the call center, building upon the recently completed Region 9 Resource Guide, or implementing a sophisticated site that offers information on providers and a trip planning functions.

## Marketing / Branding

As noted in the initial project document there was confusion over the name for the current call center, with the use of both the MOMS and Mobility Solutions Center. The transition of the regional center to a different entity provides the opportunity for consensus on one name.

Based on negative feedback on the “Mid-Ohio” component of the MOMS name, it is anticipated that moving forward the call center will be marketed as the Mobility Solutions Center. The logo developed for the Region 9 Resource Guide (shown at right) could be modified to create a similar logo for the Mobility Solutions Center, emphasizing that the resource guide is coordinated with the call center and maintaining branding consistency between the different efforts.



Whatever name is selected, the call center name and branding should be appropriate for all of Region 9. The name and branding should not be tied to the operating organization, so that branding remains consistent even if the operations are provided by a different organization in future years.

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 have dropped. It will be critical for project partners to work together to market the call center and ensure people in the community know it is available as a resource -- and to ensure potential funders and decision makers are aware of the impact it has in the community. The opportunities to evaluate and broadcast the importance of the one-call center are discussed further in the Monitoring and Evaluation section that follows in this document.

## Monitoring and Evaluation

Looking ahead there will need to be a greater emphasis on monitoring and evaluating the call center operations, especially if future funding is constrained for transportation projects and services. It will be critical to assess the effectiveness of the program, make modifications as needed, and report outcomes to partners and current and potential funders. Some considerations for this process include:

- Tracking and documenting call center services and outcomes. In addition to tracking number of calls received and individuals served, the call center should be following up on client to determine whether or not they were able to use the service (and the reasons if not). Such follow up will not only provide measures of services provided, but can also provide valuable feedback about call center's services as well as the transportation services used by call center clients.
- Assessing current conditions by identifying the level of awareness and information that customers and agency staff have about transportation services. This will help to identify the most critical issues around which marketing efforts should be focused and also provide a baseline to measure the effectiveness of the call center. Typically, this assessment is conducted through a survey or through discussions with partner agency staff to discuss their knowledge base and where they think assistance is needed.
- Through additional outreach and marketing, it is anticipated that the call volume will increase over time. It will be important to clearly demonstrate these results – particularly showing that more people are using available transportation services to access jobs, shopping, and other community locations that otherwise they would not be able to reach. A process will be needed to capture calls facilitated through the center or website hits through a one-click program, and then communicated to current and future funders in a clear and concise manner.
- Linking the call center activities to both real life situations through human interest stories and through the broader impact on the region as part of the “community infrastructure” when discussing the program with local partners.

## Using Qualitative and Quantitative Measurements

Assessing the performance of a call center and overall mobility management program involves both qualitative and quantitative measures, in part because the benefits and outcomes of the program will need to be conveyed to different audiences. Some people will want to see numbers and data, especially since the call center is connected to transportation services that need to report ridership and cost data. Other stakeholders will be interested in the impact of the call center on individuals in the community, and therefore will want stories and anecdotes that paint the picture of people who are directly benefitting from the call center efforts. Therefore, the use of both qualitative and quantitative performance measures to provide a comprehensive picture of the program's success is important.

When assessing the overall benefits of the call center and mobility management services in the region, the following should be considered:

**Direct user benefits** -- Direct benefits from the call center for users through increased access to jobs, services and activities (i.e., medical services, employment, education facilities, shopping)

**Cost savings through support for public services** -- Support for other agency activities through the call center that helps reduce costs by:

- Allowing access to medical services and therefore avoiding more acute and expensive medical problems
- Helping reduce welfare dependency and unemployment
- Providing the ability to live independently and therefore reducing care facility costs

**Economic Benefits** -- How the one-call center increases economic and social opportunities for people who may be economically, physically and socially disadvantaged.

**Option Value Benefits** -- How the one-call center is an integral part of the community infrastructure, so that even if people are not currently using the service they place a value on it for having it available i.e., when a family member suddenly can no longer drive.

Overall, results regarding the call center and mobility management are obtained through these result-oriented questions:

**How is the service affecting the community?**

**How much of the population is being served?**

**What share of the needs are being met?**

**What are the economic impacts of the service?**

## Assessment through Connection to Established Goals and Objectives

Another consideration for evaluating the impact of the call center and mobility management efforts is to link this assessment to established goals and objectives. While the RCC and other local stakeholders should occasionally discuss and update goals and objectives for the call center and mobility management efforts, Table 4-1 proposes a series of goals and objectives. Table 4-2 then takes the proposed objectives and connects them to possible quantitative and qualitative measures for evaluating efforts. Some of these goals and objectives are more appropriate for the short-term period, while some are aspirational long-range goals, and others are more relevant for densely populated communities in the region. However, they can serve as the basis in the development of initial measures for the regional call center, and the basis for discussions between Access Tusc and regional stakeholders on how success will be assessed and monitored.

**Table 4-1 Proposed Goals and Objectives**

Goals	Objectives
Focus on the Individual	<ul style="list-style-type: none"> <li>• Provide information on other transportation options and resources and refer customers to appropriate provider.</li> <li>• Schedule trips through multiple providers with one phone call.</li> <li>• Implement a “one-click” option to the call center that allows customers to access information 24/7 (long-range objective).</li> <li>• Provide public information on transportation service options, including offering materials for those with language barriers.</li> <li>• Identify and facilitate new services to meet individuals’ needs.</li> </ul>
Improve Coordination	<ul style="list-style-type: none"> <li>• Continue current partnerships and establish new ones to coordinate transportation projects, planning, service, and expertise.</li> <li>• Identify opportunities to coordinate service delivery to close gaps or eliminate overlaps.</li> <li>• Build trust by ensuring transparency of call center operations and decision making by call center’s governing board</li> </ul>
Promote Accessibility and Livability	<ul style="list-style-type: none"> <li>• Monitor services to ensure they are accessible, lead to livable communities, and improve quality of life.</li> <li>• Consider the effect of land use design and development on the provision of transportation mobility and accessibility.</li> </ul>
Ensure Diversity in Products and Services	<ul style="list-style-type: none"> <li>• Ensure meaningful access to transportation service for older adults, people with disabilities, children and youth, individuals with lower incomes, and people with language barriers.</li> </ul>
Foster Education and Awareness	<ul style="list-style-type: none"> <li>• Educate health and human agency staff, workforce agency staff, policymakers, elected officials, and other stakeholders on availability and need for alternative transportation choices.</li> </ul>
Promote Financial Sustainability	<ul style="list-style-type: none"> <li>• Leverage funding and resources through partnerships.</li> <li>• Build a strong foundation for mobility management programs through funding and resource support.</li> </ul>

**Table 4-2 Proposed Objectives and Possible Performance Measures**

Objectives	Possible Performance Measures
<b>One-Call/One Click Services</b>	
<p>Schedule trips through multiple providers with one phone call.</p> <p>Provide information through one-call transportation center on available transportation resources and refer customers to appropriate provider.</p>	<p><u>Qualitative Measures</u></p> <ul style="list-style-type: none"> <li>• Increase in the range of transportation options and service providers available to current and new customers.</li> <li>• Expanded service area to include destinations where individuals need to go.</li> <li>• Expanded options for same day service.</li> <li>• Positive (or negative) feedback from each customer on services received through call center and through transportation provider.</li> </ul> <p><u>Quantitative Measures</u></p> <ul style="list-style-type: none"> <li>• Increase in calls to one-stop call center.</li> <li>• Increase in total passenger trips on available transportation services.</li> <li>• Increase in calls referred to mobility managers</li> </ul>
<p>Implement a “one-click” option to the call center that allows customers to access information 24/7 (long-range objective).</p>	<p><u>Qualitative Measures</u></p> <ul style="list-style-type: none"> <li>• Effective web site that provides access to information.</li> <li>• Greater use of social media and other efforts to ensure knowledge of one-click option.</li> <li>• Increase in the range of transportation options and service providers available to current and new customers.</li> <li>• Expanded service area to include destinations where individuals need to go.</li> </ul> <p><u>Quantitative Measures</u></p> <ul style="list-style-type: none"> <li>• Increase in website hits.</li> <li>• Increase in total passenger trips on available transportation services.</li> </ul>
<p>Provide public information on transportation service options, including offering materials for those with language barriers.</p>	<p><u>Qualitative Measures</u></p> <ul style="list-style-type: none"> <li>• Public information and transit customer information available in variety of formats, including published in other languages and consistent with Title VI Plans.</li> <li>• Education programs provided to stakeholders, including elected officials, community organizations, health and human service agencies, and workforce programs.</li> </ul>

Objectives	Possible Performance Measures
<p>Ensure meaningful access to transportation service for older adults, people with disabilities, children and youth, individuals with lower incomes, and people with language barriers.</p>	<p><u>Quantitative Measures</u></p> <ul style="list-style-type: none"> <li>Expanded use of one call or one click services.</li> <li>Increase in number of passenger trips on services through targeted market areas for individuals with limited English proficiency or other language barriers.</li> </ul> <p><u>Qualitative Measures</u></p> <ul style="list-style-type: none"> <li>Assessment of individual needs for specific target markets based on research and community outreach.</li> <li>Approved service plans that are responsive to individual needs identified in the assessment.</li> <li>Increase in the range of transportation options and service providers available to current and new customers.</li> <li>Services provided to ensure access for specific target markets.</li> <li>Expanded transit service area to include destinations where individuals need to go for retail, health, and other services.</li> </ul> <p><u>Quantitative Measures</u></p> <ul style="list-style-type: none"> <li>Increase in percent of households within ¼ mile of fixed route or flexible route transit in census blocks reflecting concentrations of target markets.</li> <li>Expanded demand response transit service level (miles, hours) per capita in U.S. Census blocks (not served by fixed route or flexible route transit) reflecting concentrations of target markets.</li> <li>Increase in passenger trips on services in targeted market areas.</li> </ul>
<p>Educate health and human agency staff, workforce agency staff, policymakers, elected officials, and other stakeholders on availability and need for alternative transportation choices.</p>	<p><u>Qualitative Measures</u></p> <ul style="list-style-type: none"> <li>Targeted marketing campaigns to promote mobility management services and need for mobility options.</li> <li>Coordination with transportation providers on branding and marketing campaigns.</li> </ul> <p><u>Quantitative Measures</u></p> <ul style="list-style-type: none"> <li>Number of presentations to agencies.</li> <li>Number of community events attended.</li> <li>Support for mobility management and variety of transportation options based on public opinion surveys.</li> <li>Increase in total regional passenger trips.</li> </ul>

Objectives	Possible Performance Measures
<b>Service Oriented</b>	
<p>Monitor transportation services and make modifications as needed.</p>	<p><u>Qualitative Measures</u></p> <ul style="list-style-type: none"> <li>• Increased knowledge of services in community.</li> </ul> <p><u>Quantitative Measures</u></p> <ul style="list-style-type: none"> <li>• Assessment of service through performance data:                             <ul style="list-style-type: none"> <li>- Cost per Hour</li> <li>- Cost per Mile</li> <li>- Cost per Passenger Trip</li> <li>- Farebox Recovery</li> <li>- Passenger Trips per Mile</li> <li>- Passenger Trips per Hour</li> </ul> </li> </ul>
<p>Identify and facilitate new services to meet individuals' needs.</p>	<p><u>Qualitative Measures</u></p> <ul style="list-style-type: none"> <li>• Increase in the range of transportation options and service providers available to current and new customers.</li> <li>• Expanded opportunity for residents to access key destinations.</li> <li>• Increased partnerships with public and private transportation providers.</li> <li>• Establishment of new programs to meet unmet transportation needs and fill gaps in current transportation options.</li> </ul> <p><u>Quantitative Measures</u></p> <ul style="list-style-type: none"> <li>• Expanded span of service through new services.</li> <li>• Increased service days per week through new services.</li> <li>• Increase in total number of trips provided in region as a result of new service.</li> </ul>
<p>Identify opportunities to coordinate service delivery to close gaps or eliminate overlaps.</p>	<p><u>Qualitative Measures</u></p> <ul style="list-style-type: none"> <li>• Integrated service agreements between providers to minimize duplication of service and expand opportunities for customers to transfer between services or access multiple providers.</li> </ul> <p><u>Quantitative Measures</u></p> <ul style="list-style-type: none"> <li>• Increase in number of connections between transportation providers.</li> <li>• Increase in number of shared passenger facilities.</li> <li>• Increase in number of passenger transfers between service providers.</li> <li>• Increase in total regional passenger trips.</li> </ul>

Objectives	Possible Performance Measures
<p>Monitor services to ensure they are accessible, lead to livable communities and improve quality of life.</p>	<p><u>Qualitative Measures</u></p> <ul style="list-style-type: none"> <li>• Increase in travel training services for older adults, individuals with disabilities, children, and youth.</li> <li>• Increase in the range of transportation options and service providers available to current and new customers.</li> <li>• Expanded service area to include destinations where individuals need to go for retail, health, and other services.</li> <li>• Increased options for same day service.</li> <li>• Increased options for safe walking and bicycling.</li> <li>• Increased opportunities for carpooling and vanpools.</li> </ul> <p><u>Quantitative Measures</u></p> <ul style="list-style-type: none"> <li>• Greater percent of households within ¾ mile of fixed route or flexible route transit service.</li> <li>• Increased number of trips on available transportation services.</li> </ul>
Partnerships	
<p>Continue current partnerships and establish new ones to coordinate transportation projects, planning, service, and expertise.</p>	<p><u>Qualitative Measures</u></p> <ul style="list-style-type: none"> <li>• Active leadership of regional coordinated planning efforts.</li> <li>• Improved connectivity between transportation providers to provide more seamless service.</li> <li>• Greater customer access to additional transportation services.</li> <li>• Joint fare programs to provide seamless customer service.</li> <li>• Regional driver training programs.</li> </ul> <p><u>Quantitative Measures</u></p> <ul style="list-style-type: none"> <li>• Increase in number of connections either between routes, modes, or service providers that maximize the trip-making options available to individuals.</li> <li>• Increase in number of purchases of service agreements.</li> <li>• Increase in passenger trips on coordinated transportation services.</li> </ul>
<p>Consider the effect of land use design and development on the provision of transportation mobility and accessibility.</p>	<p><u>Qualitative Measures</u></p> <ul style="list-style-type: none"> <li>• Cooperative land use planning that includes transportation providers in the location of health and human service facilities, shopping centers, housing complexes, and other development that impacts need for expanded mobility options.</li> </ul>

Objectives	Possible Performance Measures
	<ul style="list-style-type: none"> <li>• New residential or commercial/retail developments built within ¾ mile of existing transit services.</li> <li>• Adopted city ordinances setting standards to provide sidewalks for pedestrians to access transit stops.</li> <li>• Safe Routes to Schools program to encourage children to walk/bike to school.</li> </ul> <p><u>Quantitative Measures</u></p> <ul style="list-style-type: none"> <li>• Number of Memorandums of Understanding between providers and communities on land use involvement or design.</li> </ul>
<p>Leverage limited funding and resources through partnerships.</p>	<p><u>Qualitative Measures</u></p> <ul style="list-style-type: none"> <li>• Initiatives to encourage local government investment in transit programs.</li> <li>• Shared funding agreements between agencies and/or stakeholders for new service implementation.</li> <li>• Applications for new sources of funding.</li> <li>• Partnerships with private industry for funding support.</li> </ul> <p><u>Quantitative Measures</u></p> <ul style="list-style-type: none"> <li>• Increase in funding sources and amounts to support mobility management activities.</li> <li>• Increase in funding as compared to previous year.</li> <li>• Increase in local funding or through sources other than federal and state funds.</li> </ul>
<p>Build a strong foundation for mobility management programs through funding and resource support.</p>	<p><u>Qualitative Measures</u></p> <ul style="list-style-type: none"> <li>• Education programs provided to stakeholders, including elected officials, community organizations, health and human service agencies, and workforce programs.</li> </ul> <p><u>Quantitative Measures</u></p> <ul style="list-style-type: none"> <li>• Increase in stakeholder involvement in regional coordinated planning efforts.</li> <li>• Increase in number of purchase of service agreements.</li> </ul>

## Timeline and Phasing

Current funding for the regional call center ends at the end of 2021, so early 2022 will see the transition of the administration and operations of the Mobility Solutions Center from SEAT to Access Tusc. It is anticipated that the first three to six months of this transition will be focused on structural development, i.e. establishing a new phone number, setting up the office location, forming the advisory committee, developing MOUs, and hiring staff. Through this period there will also need to be discussions with ODOT on potential short-term funding.

While there are a variety of variables that will impact future planning for the regional call center, this section presents a conceptual timeline for the next five years. As noted in Table 4-3 the phasing begins with the transition of the call center operations from SEAT to Access Tusc. The timeline also takes into account the ODOT funding cycle (that is provided in Appendix I), assuming that funding through their programs will be the primary support for the regional call center beyond the in the future.

Overall, it should be noted that the phasing is designed to indicate approximate timing and priority, and implementation of any one element will be a function of time commitments and funding availability.

**Table 4-3: Proposed Timeline, Activities, and Key Actions**

Proposed Date	Implementation Activity	Key Actions
January -June 2022	Transition regional call center operations from SEAT to Access Tusc.	<ul style="list-style-type: none"> <li>• Prepare space, telephone system, computer technology, furnishings and other logistics at Access Tusc to house call center operations.</li> <li>• Finalize job description and post position for call center position.</li> <li>• Hire and train staff person for call center.</li> <li>• Discuss short-term funding options with ODOT, and submit Letter of Intent to Ohio for future funding.</li> <li>• Form advisory committee and schedule initial meeting.</li> <li>• Establish call center phone number; if former MOM number is to be disconnected, set up call forwarding to new number.</li> <li>• Establish protocols for call center intake, response, follow-up, documentation, and communicating with mobility managers</li> <li>• Determine documentation and messaging technology to be used for call log and communicating with mobility managers</li> <li>• Determine initial data to collect to measure call center activities</li> <li>• Establish schedule for mobility managers to help staff call center</li> <li>• Update regional resource guide to include call center</li> <li>• Develop marketing plan</li> <li>• Develop initial marketing materials</li> <li>• Set up social media accounts</li> <li>• Prepare and send news releases and public service announcements</li> <li>• Conduct outreach and education with transit providers, human service agencies, hospitals, social workers, etc. about the call center.</li> </ul>
January -June 2022 (continued)	<p>Complete funding application process for FY2023.</p> <p>Establish formal agreements between partner agencies.</p>	<ul style="list-style-type: none"> <li>• Submit Letter of Interest (due February 22)</li> <li>• Attend ODOT mandatory application workshop in March.</li> <li>• Complete application and submit to ODOT (likely due in April); identify and secure commitment for matching funds as needed.</li> <li>• Develop agreement outlining agency roles and responsibilities.</li> </ul>

Proposed Date	Implementation Activity	Key Actions
July 2022- December 2022	<p>Market regional call center.</p> <p>Monitor call center operations.</p>	<ul style="list-style-type: none"> <li>• Develop and implement marketing plan that educates region on services provided through the Mobility Solutions Center.</li> <li>• Develop tools for evaluating call center operation; produce appropriate reports.</li> <li>• Monitor call volume and consider future staffing additions as appropriate.</li> </ul>
2023	<p>Continue administrative responsibilities.</p> <p>Continue to market regional call center.</p> <p>Monitor call center operations and make modifications as appropriate.</p>	<ul style="list-style-type: none"> <li>• Update budget, complete application and submit to ODOT.</li> <li>• Prepare and submit appropriate reports.</li> <li>• Evaluate current lead agency and determine if a change is needed.</li> <li>• Update marketing plan as needed and implement marketing and branding efforts.</li> <li>• If appropriate expand call center hours, and make part-time position a full-time one and add a part-time staff person.</li> <li>• Consider opportunities for call center staff to schedule trips directly.</li> <li>• Identify possible additional call center responsibilities, i.e. one-click services.</li> </ul>
2024	<p>Continue administrative responsibilities.</p> <p>Continue to market regional call center.</p> <p>Monitor call center operations and make modifications as appropriate.</p>	<ul style="list-style-type: none"> <li>• Update budget, complete application and submit to ODOT.</li> <li>• Prepare and submit appropriate reports.</li> <li>• Update marketing plan as needed and implement marketing and branding efforts.</li> <li>• If appropriate make part-time position added in 2023 a full-time one.</li> </ul>
2025	<p>Continue administrative responsibilities.</p> <p>Continue to market regional call center.</p> <p>Monitor call center operations.</p>	<ul style="list-style-type: none"> <li>• Update budget, complete application and submit to ODOT.</li> <li>• Prepare and submit appropriate reports.</li> <li>• Update marketing plan as needed and implement marketing and branding efforts.</li> <li>• Add additional part-time staff person.</li> </ul>

Proposed Date	Implementation Activity	Key Actions
2026	Continue administrative responsibilities.  Continue to market regional call center.  Monitor call center operations.	<ul style="list-style-type: none"> <li>• Update budget, complete application and submit to ODOT.</li> <li>• Prepare and submit appropriate reports.</li> <li>• Update marketing plan as needed and implement marketing and branding efforts.</li> <li>• If appropriate make part-time position added in 2025 a full-time one.</li> </ul>

## Funding and Financing

In conjunction with decisions related to the organizational structure to lead the regional call center is the process for applying for grants, advocating for funding, and managing the financing plan to support the system. OMEGA and the proposed formal advisory committee will also play key roles in this process.

Similar to the potential timeline there are currently a number of unknown factors that will likely affect the projected expenses and funding. However, to facilitate the development of future budgets Table 4-4 provides an initial conceptual financing plan constructed with the information that is currently available.

The notes section details some of the assumptions that were used to develop this conceptual budget, particularly related to staffing. As also noted there are projected expenses that will need to be determined through the transition of the regional call center to Access Tusc, and other direct costs listed are mainly as a placeholder for future assessment on actual projected expenses. In addition, there will need to be future discussions on potential financial contributions from participating agencies for the local match that will be required for federal and state grant programs. These amounts will need to be determined in an equitable manner, and will be critical to the long-term sustainability of the regional call center. In-kind as well as cash contributions could support the call center.

Overall this conceptual budget can serve as a starting point, and the foundation for future discussion between OMEGA, Access Tusc and the advisory committee on future funding applications.

**Table 4-4: Conceptual Budget for Regional Call Center**

Expenses		CY2022	CY2023	CY 2024	CY 2025	CY 2026
Staff Expenses (1)						
Position						
	Call Center Position #1	\$21,060	\$28,642	\$29,214	\$29,799	\$30,395
	Call Center Position #2	\$0	\$21,060	\$28,642	\$29,214	\$29,799
	Call Center Position #3				\$21,060	\$28,642
Call Center Management (2)						
	Subtotal Salaries	\$21,060	\$49,702	\$57,856	\$59,013	\$60,193
	Fringe Benefits (3)	\$7,371	\$17,396	\$20,250	\$20,655	\$21,068
<b>Total Staff Expenses</b>		<b>\$28,431</b>	<b>\$67,097</b>	<b>\$78,106</b>	<b>\$79,668</b>	<b>\$81,261</b>
Other Direct Costs						
	Telephone	\$6,000	\$6,500	\$7,000	\$7,500	\$8,000
	Rent (4)	\$0	\$0	\$0	\$0	\$0
	Printing & Duplicating	\$1,000	\$1,000	\$1,500	\$1,500	\$1,500
	Advertising and Marketing	\$5,000	\$6,000	\$7,000	\$8,000	\$9,000
	Office Furniture	\$1,000	\$2,000	\$1,000	\$2,000	\$1,000
	Postage and Delivery	\$500	\$500	\$500	\$500	\$500
	Materials & Supplies	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000
	Computer Equipment/Upgrades	\$1,000	\$2,000	\$2,000	\$2,000	\$2,000
Technology Upgrades (5)						
	Website Upgrade (5)					
	Other	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000
<b>Total Other Costs</b>		<b>\$16,500</b>	<b>\$20,000</b>	<b>\$21,000</b>	<b>\$23,500</b>	<b>\$24,000</b>
<b>Total Program</b>		<b>\$44,931</b>	<b>\$87,097</b>	<b>\$99,106</b>	<b>\$103,168</b>	<b>\$105,261</b>

**Notes:**

(1) Based on wages projected by Access Tusc; actual salaries will be based on local market and funding availability

Assumes each call center position is part-time (30 hours) for one year, then becomes full-time (40 hours)

Assumes 2% COLA salary increase in each year

(2) TBD the portion of supervisory position that would be allocated to call center operations

(3) Assumes 35% of salaries

(4) Assumed to be provided as in-kind by Access Tusc until possible transition to larger space

(5) TBD based on future needs

## 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



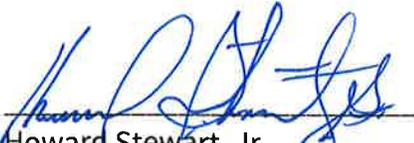
**VI. OTHER TERMS AND CONDITIONS**

**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 Loaning 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	Loaning 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.

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

By:

By:

\_\_\_\_\_

\_\_\_\_\_

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

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

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

\_\_\_\_\_ [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**

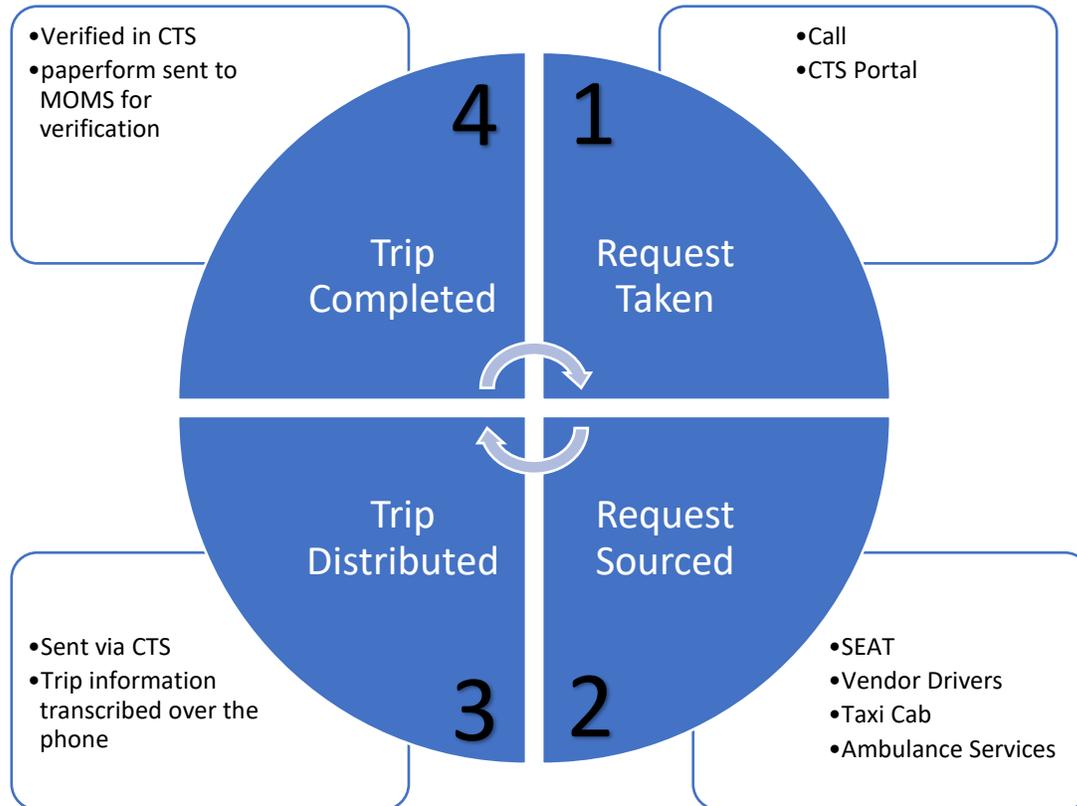
Days: Thursday 12 pm-4 pm  
 Friday 8 am -Sunday 4 pm  
 On-Call Hours: 12 Total Hour Pay

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

**Technology**

Trip Technology: CTS TripMaster

Message Communication: ICQ Messenger

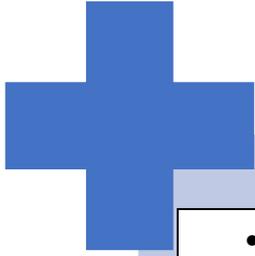


**GOALS**

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**

# Appendix F

# Mobility Solutions Center Report Form



# Appendix G Regional Intake Form

REGIONAL INTAKE FORM

**PERSONAL:**

Date

Name : first, MI, last

Address

DOB

Current age in years

Gender M or F

Identity of Race Caucasian/African American/Hispanic or Latin American/Asian/ Native American

County of Residence

SSN

Phone, email address, and cell. What is the best way to reach you with information?

Emergency contact name and phone number

What are your primary and secondary transportation needs? i.e. #1 Employment #2 Doctor's appointments

How did you hear about us?

**MOBILITY:**

Medicaid?

Veteran?

Are you medically disabled?

Ambulatory

Cane

Walker

Crutches

Escort/Attendant

Scooter

Lift required?

W/C power or manual? oversized?

(The maximum occupancy weight for our W/C lifts is 800 pounds. Do you and your W/C combined meet that requirement? If no, ask if they meet a 1000-pound maximum combined occupancy weight limit.)

Guide Dog or other Service animal? Type of service provided to client/species of service animal

Special Assistance: sight impaired or blind, hearing impaired or deaf, need O2, others??

Are you concerned about the cost of your transportation? Low income?

**APPOINTMENT:**

Time, date, address and phone number for appointment requiring transportation

Is it recurring or one time only

Do you need transportation both ways

**ADDITIONAL INFORMATION/OTHER SERVICES OR NEEDS:**

Housing, food insecurity, recovery, living alone, need reminder calls

**ASSIGNMENT:**

Assigned to: (example would be M/M Tusc Co)

Call attempt 1: who, date, time, method of contact (email, phone, text), result

Call attempt 2: who, date, time, method of contact (email, phone, text), result

Call attempt 3: who, date, time, method of contact (email, phone, text), result



# Appendix H

## Memorandum of Understanding

### Between the Peninsula Agency on Aging, Williamsburg Area Transit Authority, and Williamsburg Faith in Action

**DRAFT**

**Sample**

**Memorandum of Understanding**

**Between the**

**Peninsula Agency on Aging, Williamsburg Area Transit Authority, and  
Williamsburg Faith in Action**

**I. Purpose**

The following is an agreement between the Peninsula Agency on Aging (PAA), Williamsburg Area Transit Authority (WATA), and Williamsburg Faith in Action (WFIA). The purpose for this Memorandum of Understanding (MOU) is to detail the roles and responsibilities of each organization in regard to the administration and operations of the Williamsburg area one-call center.

The period of this agreement begins on [insert date] and continues until [insert date a year from the start date].

**II. Roles and Responsibilities**

**Peninsula Agency on Aging (PAA)**

***Administration***

- Hire, train, house, and supervise staff for the one-call center.
- Maintain budget and monitor operating expenses for the one-call center.
- Research funding programs and submit appropriate applications.
- Monitor and evaluate call center services and producing appropriate reports.
- Identify additional opportunities to expand call center functions, i.e. one-click services.
- Identify costs related to services beyond call center functions and work with WFIA and WATA on any fees or shared costs.

***Operations***

- Establish a toll-free phone number for the public to call.
- Counsel customers on trip planning and determination of eligibility for services.
- Utilize current software program to schedule rides for qualified individuals on one of the three service providers -- RIDES, WFIA, or WATA Paratransit.
- Communicate appropriate trip information to WATA and WFIA (see policies and procedures).
- Maintain database of current transportation services.
- Develop appropriate forms in consultation with other partners.
- Identify opportunities to streamline eligibility processes.
- Provide information and referral to other services as appropriate.

## **Williamsburg Area Transit Authority (WATA)**

- Implement technology to support coordinated scheduling program.
- Provide trips assigned through coordinated scheduling program.
- Verify trip data and communicate to PAA through call center.

## **Williamsburg Faith in Action (WFIA)**

- Implement technology to support coordinated scheduling program.
- Coordinate trips with volunteer drivers assigned through coordinated scheduling program.
- Verify trip data and communicate to PAA through the call center.

## **JOINT Responsibilities**

### ***Information Sharing***

- Provide information about and train one another on their respective services and philosophies.
- Share information regarding services, other providers and resources to assist in maintaining and updating their call center database.
- Provide each other with information regarding unmet needs identified through the call center or transportation services.
- Share information about staff and consumer training opportunities.

### ***Collaborate on Community Events and Outreach***

- Collaborate on community events and outreach.
- Market one-call center services.

## **III. Policies and Procedures (*these are sample procedures -- will need to be updated based on final process for scheduling trips through coordinated software program*)**

### **PAA/WFIA**

- By 4:00 PM each weekday PAA will communicate all ride requests for WFIA's services.
- WFIA will receive PAA's ride report and enter it into their system and schedule the rides with their volunteer drivers.
- By 9:00 AM each weekday WFIA will send PAA a confirmation of the rides scheduled for each day and a confirmation of the rides provided on previous days by WFIA drivers. They will also notify PAA of any rides sent to them that they were not able to accept within 12 hours of WFIA's receipt of the ride request.
- PAA contacts rider to confirm ride.

### **PAA/WATA**

- By 4:00 PM each weekday PAA will communicate end all eligible ride requests for WATA paratransit services.
- By 9:00AM each weekday, WATA will send PAA a confirmation of the rides scheduled for each day and a confirmation of the rides provided on previous days by WATA drivers. They will also notify PAA of any rides sent to them that they were not able to accept within 12 hours of WATA's receipt of the ride request.
- PAA contacts rider to confirm ride.

*Appropriate information can be included in this section based on additional partnerships, i.e. if PAA assumes responsibility for determining ADA paratransit eligibility process.*

**Call Center Process for Referrals for Service**

PAA will provide information on current transportation services, refer customers to appropriate transportation resources, and schedule customers through the following process:

- Provide information on WATA fixed routes.
- Refer Medicaid transportation eligible customers to broker for non-emergency medical appointments.
- Schedule eligible ADA paratransit customer on WATA services.
- Schedule trips on RIDES when customers are over 55 or have a disability, the ride is not eligible for Medicaid transportation or ADA paratransit and they do not need assistance inside either pick up or drop off locations.
- Schedule trips for WFIA volunteer driver services if they are over 60 years old, or significant disability, live independently and in service area, and need assistance inside either pick up or drop off locations.

Where the same or similar services are provided by multiple agencies, PAA shall act in the best interest of the customer and shall be under no obligation to make exclusive referrals any one agency.

This agreement is effective until terminated by either party and may be revised upon the mutual concurrence of both parties.

\_\_\_\_\_  
*[Insert PAA representative name]*

\_\_\_\_\_  
 Date

\_\_\_\_\_  
*[Insert WATA representative name]*

\_\_\_\_\_  
 Date

\_\_\_\_\_  
*[Insert WFIA representative name]*

\_\_\_\_\_  
 Date

Effective: *[Place date here]*  
 Revised: *[Place date here]*

# Appendix I

# ODOT State & Federal Funding Cycle

# Ohio Department of Transportation – Office of Transit State & Federal Funding Cycle

