

# ONE CALL- ONE CLICK

## **THE BENEFIT OF EXPERIENCE: ADVICE FROM THE ONE-CALL SERVICES FIELD**

Regardless of size, communities across the country are becoming more and more interested in adopting telephone and internet-based services to better respond to community residents' needs for more customer-friendly transportation solutions. The good news for these communities is that there have been early adopter communities of one call–one click services that can serve as role models. These early adopter services may or may not have focused specifically on transportation, but all have focused on serving the customer.

For the One Call–One Click Transportation Services project, we interviewed individuals who have been active in the development of one call–one click services at national, state and local levels. This document is a synthesis of those discussions and provides advice about partnership-building, the planning process, sustainable funding, technology and other issues.

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### THE INTERVIEW PARTICIPANTS

Interviews were held with individuals who have been active in the development of one-call services that focused on transportation services or that include transportation as a component. These interviews elicited a wide range of perspectives about one-call services from the perspective of human service agencies, public transportation, and commuter services. They provided insight into the development and current status of one-call services for transportation, Aging and Disability Resource Centers (ADRC), 2-1-1 services, and others.

Interviews were conducted using a set of guided interview questions, as listed in Figure A-1. The following individuals graciously took the time to participate in the interviews:

- Mr. Doug Birnie, Federal Transit Administration - United We Ride
- Ms. Linda Daily, 2-1-1 Director - United Way of America
- Mr. Yehuda Gross, FHWA/FTA Joint ITS Program Office
- Mr. Rico Fleshman, Mid-Atlantic Area Manager - VPSI, Inc.
- Ms. Elizabeth Leef, Mr. Greg Link, and Ms. Sherrie Clark, Admin. on Aging - U.S. Department of Health & Human Services
- Ms. Sarah Lash, ADRC Project - Lewin Group
- Ms. Leigh Ann Trainer, Georgia Department of Human Services

### FIGURE A-1: GUIDED INTERVIEW QUESTIONS

1. Share your perspective on one-call services based on your experience.
2. Discuss the most common perceptions or mis-perceptions about what a one-call service is. What are effective ways of broadening the perspective of individuals and helping a group to build a common understanding?
3. What tools and information do you think would be most helpful for communities considering one-call services?
4. Discuss the most common issues faced in developing a call center.
5. At what point in the planning process is it important to obtain support on technological options?
6. How have you seen call centers evolve over time? Organizationally? Functionally? Technologically?
7. Discussion of items specific to interviewee's area of expertise.

### PERSPECTIVES

The participants have worked with one-call services from the perspective of:

- Federal Communications Commission universal access numbers

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(2-1-1, 3-1-1, 5-1-1, etc.)

- Aging and Disability Resource Centers (ADRC) and access to a wide range of human service agency programs
- Transit or specialized transportation services and the role of one-call services in the coordination of transit and human service agency transportation
- Rideshare services including carpool, vanpool, and other commuter services
- Technology for one-call services and transportation coordination

The participants have broad experience with one-call services that have been in existence for many years and those just developing. They have knowledge of services ranging from those with individual counseling to web-based services with little or no options for personal interaction.

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### GENERAL ADVICE

The individuals provided unique perspectives but common themes were woven through most of the interviews. Some common themes were:

- Build upon the existing resources in your community.
- Start with an assessment of resources and needs.
- Establish a clear vision of what is needed.
- Build partnerships.
- It takes time to establish a fully functioning system, and many services grow incrementally over many years.

- A foundation of working relationships, information and assistance programs, or partnerships will provide a head start.
- Marketing and outreach are important to success.

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### PERCEPTIONS

The interviewees' perceptions of one-call services reflected their backgrounds. Taken together they provide a good vision for one-call services as well as an understanding of how such services have developed in different environments.

### A COMMUNITY ASSET

One-call services are widely seen as a community asset and an invaluable way to move forward. New opportunities have been created by technology - opportunities to create a more comprehensive vision of mobility and opportunities to overcome challenges associated with access to and the delivery of specialized transportation services.

It is important to recognize that transportation is an important part of any program delivery and transcends virtually all government departments. One-call services can relieve agencies, organizations, or businesses of the need to deal with complex transportation issues. This frees up staff of these agencies, organizations or businesses and enables them to focus more on their core mission.

One-Call services are excellent at simplifying access for the

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consumer. They also can promote broad coordination efforts, as community stakeholders identify more effective ways of working together and using their resources. These coordination activities are important for one-call services to result in more mobility for consumers, as they will enable communities to fill the empty seats on buses and more effectively utilize existing transportation resources. At the same time, it is recognized that one-call services cannot solve all issues.

### UNDERSTANDING THE CALLER'S PERSPECTIVE

When people start thinking about one-call services, their concept reflects the mind of the provider. It is important to switch to a client perspective. Sometimes agencies develop what they think of as a one-call center and over time discover that it really isn't able to serve that function as they lack services or community connections. Sometimes transit agencies are so firmly rooted in the transit operations environment it is difficult to understand and embrace both the consumer perspective and the other mobility options that are available. This can be equally true of any provider. It is a challenge to see other perspectives. A one-call service needs to reflect the perspective of the caller, to be able to help people save time and to facilitate their connections.

### TENSIONS

There are primary tensions that surround the development of one-call services. A key issue for human service agencies is funding: there is never enough funding to provide needed levels of

transportation services. How can agencies that are used to competing for a limited pot of money cooperate instead? How can they both support improved access to services and control the level of services so they match available resources? A primary tension that many Aging and Disability Resource Centers encounter is whether they will be co-located with truly centralized services or if they will use technology to operate out of different locations. For a transportation one-call service this might equate to having a location with easy consumer access or being located off the beaten path with dispatchers and operating staff.

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### PLANNING PROCESS

An inclusive planning process will provide a forum for building partnerships and consensus around how to move forward. Getting to know partners and learning how to work effectively with them is important in developing a one-call service. It takes time for representatives of different programs to realize they have common objectives.

Several interviewees identified the importance of a complete assessment as the initial step. Look within your community to see what is already there. Information on the technological infrastructure is also useful. Build an understanding of how resources are organized and how services are delivered in your community. What are the formal and informal networks that are in place? Small towns and rural areas tend to have stronger informal networks in place than more urban areas.

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It is useful to understand what three digit services are available in your community. Are there 2-1-1, 3-1-1, or 5-1-1 services in your community? What are their boundaries? Are you encompassing the entire range of human service, public transit, commuter, faith-based, educational, and volunteer programs that might provide transportation services? Is there an Aging and Disability Resource Center or other information and assistance program?

It is also useful to address the importance of boundaries. How will service area boundaries affect the one-call services? Some transportation may only be available in a city or county; human service programs may have different boundaries. Are there key services such as a regional medical center that is in a different county? Do most workers live and work in the same jurisdiction or travel across jurisdictional boundaries to access jobs?

Take advantage of existing one-call, one-stop, or technical assistance networks in your community. If you can build upon such a foundation you will have a head start on building a transportation one-call service. These networks are often trusted and widely used. Build on what you have.

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### USEFUL TOOLS

The interview participants identified a variety of potential tools.

- The participants advise that the first step is to conduct an assessment of community resources. Training for this assessment and

how to capitalize on it in coordination efforts is the Transportation Solutions: Linking People with Their Community training offered by the Community Transportation Association of America (CTAA). It trains human resources, transit and mobility management staff to assess what transportation and other resources exist, both public and private, and offers strategies for coordination efforts. It educates local human service, workforce development, and nonprofit organization staff with the information and training they need to help match individuals with the appropriate form of transportation. CTAA and Easter Seals, Inc. produced the Transportation Solutions curriculum. Information about the curriculum is available at [www.ctaa.org/transportation\\_solutions](http://www.ctaa.org/transportation_solutions).

- The Aging and Disability Resource Centers have a wide range of tools on the technical assistance website, [www.adrc-tae.org/tiki-index.php?page=HomePage](http://www.adrc-tae.org/tiki-index.php?page=HomePage). Many of these would be useful for any one-call center. For example, there is good information on Memorandums of Understanding with potential partners. The readiness assessment for ADRCs has developed over time and reflects the steps communities need to go through in order to get from a developmental stage to a fully functioning status. These steps are particular to ADRCs but many may crossover to other types of one-call services.
- The Alliance of Information and Referral Services (AIRS) website is a useful tool. AIRS has established protocols for successful one-call services and a complete taxonomy that includes transportation options. State chapters and the annual national conference provide additional resources. The website is located at

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<http://www.airs.org/i4a/pages/index.cfm?pageid=1>.

- The United We Ride Framework for Action Community Assessment is a tool that was widely used and provided suggestions for communities to consider. It can be found at [http://www.unitedweride.gov/1\\_81\\_ENG\\_HTML.htm](http://www.unitedweride.gov/1_81_ENG_HTML.htm).
- The Mobility Services for All Americans (MSAA) project is establishing replicable models of Transportation Management Coordination Centers. In 2011, it will be producing a report documenting the demonstration projects. Eight communities participated in the first phase and several are continuing through the full deployment. The final report will be a useful guide. More information about MSAA is available at [http://www.unitedweride.gov/msaa\\_Fact\\_Sheet.pdf](http://www.unitedweride.gov/msaa_Fact_Sheet.pdf).
- Staff needs proper tools and training to provide information to callers. A list of questions would be useful to assist the staff in eliciting information from riders. For example, ask what other services they receive to determine the transportation for which they are eligible (Do they attend a senior center? Do they receive Medicaid?). Or determine the types of transportation they need and how they have been meeting their needs in the past (Are they able to get transportation to their doctor?). These questions could help staff drill down to get the full picture.
- Education is needed for the people manning the phones that covers all the alternatives and also includes compassion for people who are calling. It is important to speak the language of people

who are calling rather than the language of a particular program or of the transportation world.

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### TECHNOLOGY

Technological innovations are enabling a new generation of transportation one-call services that provide improved access to mobility options and trip planning services. This technology can support coordinated human services transportation options and better use of resources - resulting in an increased number of rides. It can also support customers. For example, smart phones can be used to let someone know his or her trip has arrived. This can strengthen the customer focus that is at the heart of a one-call service.

Regardless of their technology literacy, stakeholders can always tell you what bothers them. A good facilitator (such as an experienced systems engineer) will translate from what bothers them to what they really need. When their unmet needs are correctly identified and addressed, they will support and advocate for the project.

Several interviewees noted that most individuals developing one-call services are not experts in technology options. They noted the assistance vendors can provide to educate community staff about technological options that could be effective. There were differences of opinion about when to involve vendors, with some noting it is useful to have them at the table early in the process and others expressing concern that it is often best to identify what you want to do first so you purchase what you need and not what a particular

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vendor has for sale.

The general consensus is that it is important to begin by establishing a clear vision of what is needed, what your system wishes to accomplish, and to identify other Information Technology (IT) activities in the State or region that may affect your plans. Then, it is time to do background work and define the program. Once the program is defined you can bring in vendors about their expertise and to address detailed technology questions, talking with vendors about telephone, computer hardware and software. It is important to give vendors clear direction on what is needed. Larger organizations may have existing systems and IT staff in place that can provide guidance throughout the process.

The Mobility Services for All Americans (MSAA) project uses a structured approach, and if one takes this tact it is possible to have vendors involved from the beginning. With a systems engineering (or structured approach) the needs of each participant are identified and addressed. However, the agencies that applied for MSAA grants had done a certain level of assessment to be able to apply for this demonstration project.

The Transportation Management Coordination Center project sites have found this systems engineering process extremely helpful in engaging their stakeholders and making sure the right system gets built.

Intelligent Transportation System (ITS) applications need to be deployed in logical phases. There exist certain logical orders of ITS

deployment in order to achieve maximal benefits. For example, without computer-aided dispatch (CAD), automatic vehicle locator (AVL) functions will be compromised. Without AVL, the value of Mobile Data Computers (MDC) cannot be fully realized, etc. As you build your system, keep in mind how it can accommodate future expansion should other customers, programs, and service providers want to join your one-call system.

Two other interesting items related to technology came up during the interviews. (1) As you determine the functions you wish to have in your call center, note that the software for setting up commuter rideshare programs (carpools and vanpools) is very different than the software for coordination of specialized transportation services. Only one vendor was identified that serves both markets, although this may change in the future. (2) It was noted that when vendors are involved from the beginning of the process and through public-private partnership arrangements, one is better able to leverage additional funding from multiple sources, including state and regional governments.

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### ISSUES

There were similarities in the issues that participants identified, but the issues strongly reflected the different perspectives of the participants. Issues vary in different parts of the country and among different program participants. Some important issues are described below.

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1. Developing a one-call service takes time – it can take several years from the initial planning phase to full functionality. This varies with the complexity of the system and the level of sophistication of existing information and assistance services or transportation coordination activities. Developing one-call services also involves more staff time than most participants expect at the outset. One interviewee described the time to develop a fully functional system as “the speed at which the agency moves.” Some programs may get up and running within a year, while others are still not fully functioning four years into the process.

- Often the availability of funding is a determining factor. If an agency has to wait for grant funding, that can add significant time to the process.
- Partnerships are a key to success. It takes time to get to know partner agencies, develop solid working relationships between agencies, and to develop a consensus among stakeholders.
- Another factor that requires a surprising amount of time is the many details and protocols that need to be worked out. Once there is agreement on what will be done, there remains significant work to figure out the details of how to do it.
- Finally, transitioning to a new understanding of how services can be provided and developing a customer focus are activities that take a considerable amount of time.
- Some other factors that affect the time it takes to develop are staff turnover and leadership changes.

2. Be prepared to address unforeseen issues both in the development phase and as systems are implemented. Be prepared to

address more calls, including unusual calls and “phantom” calls, than you could imagine. Include emergency services in your partnerships. You will get to know your telecommunications provider well.

Be prepared to establish reasonable expectations. For example, people may expect that services will be available 24/7. It is important to be clear about what your service can provide, and to do that well.

3. A one-call service oriented to delivering transportation or human services needs to provide customers with what is described by ADRCs as “options counseling.” An initial customer assessment is used to identify the types of transportation needs that exist and the options that are available to meet their various needs. While this can be time-consuming it also can pay-off in the long run by getting the individual the most appropriate and least expensive transportation services. This is a different standard than used by proprietary call centers, which focus on reducing the time each call requires.

One can learn lessons from proprietary call centers in management and service delivery - but understand they are not directly transferrable. To meet the needs of those requiring human services, we need to reflect the health and human service cultural expectations. This does not always fit well with management objectives for proprietary call centers, yet we still have to develop call centers that have sound budgets and provide cost-effective services.



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4. Marketing and outreach are important to success. The three-digit services such as 2-1-1 have spent years developing a presence so there is widespread recognition of the service. What will it take to develop broad community knowledge of a transportation one-call service?

Successful one-call centers require constant evaluation and need to respond to market changes. Early transportation one-call services have needed to adapt to changing conditions – such as technology. For rideshare services, a big hurdle is answering the question “Why should I participate?” Incentives to participate can be important, especially in the beginning.

On a larger scale, both the Aging and Disability Resource Center program and the Mobility Services for All Americans demonstration project have provided substantial incentives to communities to develop one-call services in the form of one-time grants and technical assistance. Policy direction from the states is another form of incentive. Without policy direction, services developing from the grass roots level can be hard to expand or replicate. State leadership is needed to promote the message that one-call services are an important activity.

5. The shortage of funding is a perennial issue – and a reason to pursue coordination. However, when funding is short, many areas would rather spend money on services than infrastructure improvements. Also, some areas find that because resources are not adequate to meet the transportation demands they still need

to have a gatekeeper to limit the number of trips to match available resources. This is counter to the role of a one-call service in improving mobility.’

The Administration on Aging now has an emphasis on communities developing financially sustainable systems. The expectation is that an ADRC will develop sustainable funding streams within a five-year period.

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### CONCLUSION

To learn more about one call–one click services from the interview participants’ perspectives, please visit the web links offered in the “Useful Tools” section of this document.

The Community Transportation Association of America is a national non-profit, membership organization working to ensure that our nation’s residents have reliable, accessible, affordable, convenient and safe transportation services. The Association is involved in several projects to provide information and technical assistance to communities, transportation providers, human services agencies and other groups to increase mobility through effective public and community transportation.

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