National Aging and Disability Transportation Center 2019 Innovations in Accessible Mobility Implementation Grant Report

Generated by Partnership for Age Friendly Communities on behalf of North Front Range Metropolitan Planning Organization (NFRMPO)

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In February 2019 a collaborative group from Larimer County, Colorado entered into a funding agreement with the National Aging and Disability Transportation Center (NADTC) to complete a "Proof of Concept" project related to improving mobility services in the southern rural area of Larimer County. The lead entity for the project was the North Front Range Metropolitan Planning Organization (NFRMPO), with participation from the Larimer County Office on Aging (LCOA), the Partnership for Age Friendly Communities in Larimer County (PAFC), Via Mobility, and local ride providers.

The community sought to test the viability of a more coordinated transportation management system by utilizing a One Call/One Click Center (OCOCC). As part of this OCOCC, riders contacted the call center directly rather than individual ride providers to schedule rides. The providers had the opportunity to use ride management software and a call center to schedule and report on rides given. The overall goals of the project included:

1) Establishing new relationships and agreements to formalize partnerships among key project participants;
2) Connecting up to five local ride providers with a mobility management system featuring the services of a call center (provided by Via Mobility) and software system (provided by Routematch and Via Mobility);
3) Providing at least 400 rides as requested and documented through the mobility management system between May and August 2019, later extended to October.

Throughout and after implementation of this "Proof of Concept" project, the collaborators evaluated the viability of the concept as a long- term solution for our community. The project also contributed to the development of the Larimer County Senior Transportation Implementation Plan (Implementation Plan). This plan was developed concurrently through another initiative managed by the NFRMPO.

The project was initiated in March 2019, and the final rides and project wrap up was completed in October 2019. All three goals were accomplished, and useful learning was shared among the collaborative partners NADTC and those developing the Implementation Plan. Collaborators desired and committed to maintain the relationships established under the project and to maintain a high level of involvement with the Larimer County Mobility Committee. Over 500 rides were provided over the course of the project and 74 community residents participated in the pilot.

Key Participants

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Activities

Working as a Collaborative Group

This project was initiated under the previously awarded NADTC "Getting Ready to Innovate" (GRTI) grant to a Larimer County collaborative group in the fall of 2018. As part of the grant, the community began a concerted effort to convene a collaborative work group made up of various transportation providers in Larimer County. Prior to this pilot program, individual ride providers mostly stuck to their service areas and had little interaction with each other. One provider described the work group as an opportunity for companies to break out of their "silos."

Local ride providers, transportation planners, and community collaborators participated in an "Expert Panel" during 2018 to consider the opportunities, benefits, and drawbacks of utilizing ride management software as a foundational element of efforts to improve ride services. Implementation funding through NADTC's Innovations in Accessible Mobility Implementation Grant in early 2019 allowed the group to Implement a short term "Proof of Concept" project focused on rural southern Larimer County.

The ability of the group to develop relationships and move toward a common vision during the "Expert Panel" phase carried over to the "Proof of Concept" phase. Via Mobility (as the call center operator) and four local ride providers of varying types (two non-profit and two for-profit carriers) joined together to test the concept. NFRMPO, PAFC, Larimer County Community Planning, Infrastructure & Resources, and the Larimer County Office on Aging also participated in the project.

Although some may have been hesitant in the beginning, all providers now describe the relationships they have developed during the project as meaningful and long lasting. Diane Pugh of RAFT described the experience as "Wonderful. Everyone was very positive and helpful."

Call Center & Ride Portal

This project utilized Via Mobility's call center and employees as the One Call/One Click Center (OCOCC). Ride referrals were given to the Via Mobility team either by providers or directly from riders. The Via Mobility team then posted the ride in the portal for eligible providers. Most providers felt that the portal was very easy to use. At the beginning of the project, some providers would receive requests for rides, then

pass them along to the call center. As the project progressed, riders were encouraged to connect directly with the call center, either via phone or utilizing the web portal. An estimated 237 calls related to this project were fielded by the call center between May and September.

When providers need to arrange for their scheduling and dispatch using the portal, the tool was adequate. Megan Kaliczak of zTrip stated that "all the information I needed was there."

Providers did express concern that the ride referral process used during the pilot program was not feasible in the long run. The process often involved multiple emails and phone calls to ensure that the provider both saw the referral and could accept the ride. During the project time period, not all of the features of the software were being utilized, and the providers did not have full software capabilities at their sites, or fully functioning tablets in each of their vehicles. When the OCOCC is functioning at full capacity, this will make it much easier to track and accept referrals even in high volume times and allow all notifications and acknowledgements to take place directly in the portal. These measures will help greatly to improve efficiency in full implementation, but not all features were utilized during this short term project.

Initial Training for Providers, Dispatch, and Drivers

This project relied heavily on Via Mobility's expertise in operating a OCOCC in Boulder County. Via Mobility staff were very helpful in providing an orientation and training for use of the portal, call center, and, in some cases, tablets provided to participating ride providers. Training for all paid and volunteer personnel involved in long-term implementation is considered essential for long- term success. The existing providers and their personnel did very well during this short- term project, but not all features of the software or coordinated system were utilized.

Tablets

As part of the pilot program, Via Mobility provided a tablet to drivers and dispatchers in at least some of the vehicles utilized for transit by each provider. This was to allow participants with very limited experience using the tools to gain experience with such systems. The tablet gave the driver and dispatcher access to rider information, allowing real time adjustments.

Most of the transportation companies expressed concern over the use of the tablets. Some of the transportation companies function off the generosity of volunteer drivers

and are worried they will lose drivers if the tablets are required. Others worry about connectivity and technical problems. Lisa Bitzer of Via Mobility experienced a similar reaction when first trying the tablets in her company. She assured the group that although there was some backlash with her drivers initially, that everyone felt comfortable and confident after adequate training. One ride provider already had technology in all of their vehicles due to other contracts and system operation, but they were not able to link with the Via system. They still expressed interest in linking/using tablets in the future, as they know the benefits. In all, two ride providers put to use four tablets during the project. Driver feedback was generally positive, and connectivity was not an issue. One provider did not use tablets at all (accessed the portal through a desktop system then passed paper manifest to drivers). One provider converted portal requests to their technology through their call center but would like to connect vehicles directly to the software in the future.

Accepting Requests, Scheduling, and Providing Rides

Beginning in the month of May and ending in September 2019, project collaborators began operation of the OCOCC with a specific access via phone number and web address for Larimer County participants requesting rides, and a portal through which ride providers could claim and account for rides. The software aided greatly in documenting key rider information and scheduling rides. The software also tracked rides given and provided rudimentary reports for verification and billing purposes. Complex features related to eligibility, payer sources, and billing reports were not utilized for this short- term project, though they are available in the software.

Overall feedback for the portal and the call in system was that it worked well and was simple to use. Various "types" of trips and scheduling were experienced, including one time and "subscription" trips, requests with special needs for driver skills/equipment, advance and "last minute" requests, and requests requiring two ride providers to coordinate service and "hand off" riders in order to successfully provide the ride. In all, an estimated 237 request (calls + online requests) were handled, 514 rides were provided to an unduplicated count of 74 individuals. Rider information indicates that 23 were persons with disabilities and 51 were older adults.

Reporting, Accountability and Project Management

Effective use of the software and implementation from the Via Mobility call center staff allowed for smooth monitoring and reporting for the project. On a daily basis, the successful provision of rides could be tracked and special circumstances, complaints, or exceptional performance could be noted.

For the entire project there were only three "no show" events (where the driver did not show for a scheduled pick-up) with over 500 rides delivered. There were only 13 "denials" (rides requested through the call center but unable to be scheduled), and ten of the thirteen denials were due to riders making last minute requests. The call center was willing to handle the request and attempt to fulfill, but the attempt was not successful.

Because not all ride providers and drivers were using tablets and operating with a fully linked system, some of the more sophisticated features of the software could not be experienced during the project. The project implementation was flexible enough to allow drivers who did not want tablets to continue their service, and yet allow testing for those who wanted to experience the tablets. Two ride providers and four drivers got to practice with the newer technology.

Success Stories

Breaking Boundaries

Making it to doctor appointments is essential for everyone. When you are limited in your own mobility and your primary caregivers can no longer drive it can be tricky getting to those essential appointments. Via Mobility received a referral for an adult with disabilities needing to get from Longmont to Fort Collins for a very important appointment with their neurologist. All of the other ride providers in the area were fully booked. So Lisa Bitzer with Via Mobility reached out to Dianne Pugh from RAFT, who said they would be happy to accommodate this ride. RAFT normally services the Berthoud area and would not have gotten this referral without the network established with this pilot program.

Trudy is an older adult with some cognitive deficits who relies on a scooter for short range mobility. She is unable to operate a motor vehicle and relies on paratransit services for local travel, limiting her trips to areas immediately surrounding her hometown of Boulder. When she got the heartbreaking news that her father was on his deathbed in a Fort Collins hospital, she wanted to be there more than anything. The hospital was over 55 miles away. She found herself trapped within service area boundaries with a trip that would cost her nearly $300.

When Lisa Bitzer from Via Mobility found out about this need, she partnered with Megan Kaliczak from Z-Trip to defy service area restrictions and get her to the hospital in Fort Collins. Via Mobility took Trudy from Boulder to Longmont where Z-Trip picked her up and took her to the final destination in Fort Collins. Without the collaboration and communication between ride providers that this program allowed, Trudy would not have been able to make this trip. More importantly she would not have been able to be with her father in his final moments, which in many ways was priceless.

Going the Extra Mile(s)

These stories are just two of the many touching experiences shared by riders and transportation providers. Stories like these show just how much collaboration amongst providers can impact the lives of community members.

Key Results & Learning

Working as a Collaborative Group

This project extended the participants' experience as collaborators and increased the desire to work together in an integrated long- term mobility management system.

At the end of the project, all four ride providers and Via Mobility (who provides rides as well as operates a call center) agreed to continue to work together "informally" until the overall Implementation Plan is in place. Specific elements of "working together" include:

- The group, under the leadership of the NFRMPO, developed a Providers Guide designed to be at the desk of ride providers and dispatchers so that they can easily identify options and connect with other ride providers if they find that they cannot accommodate a ride request.

- Ride providers agreed to work together where possible to coordinate rides which cross boundaries and require multiple providers.

- Ride providers welcomed the chance to assist each other when unforeseen circumstances arose - such as a last minute driver cancellation which required an entire manifest to be rescheduled.

At the system level, all of the project participants continue to participate on the Larimer County Mobility Committee and have been active participants in the development of the Implementation Plan. All are supporters of encouraging County and Regional authorities to adopt the regional plan, to support the placement of a Mobility Manager at the NFRMPO, and to continue efforts to establish a long- term OCOCC for the benefit of Larimer County and the surrounding communities.

Considerations for Future Implementation of a Collaborative OCOCC

Project participants identified several issues which were of lower priority during the Proof of Concept project but will be essential to adequately address as our community moves to full implementation. These include:

- The need for adequate training at all levels. Via Mobility, several ride provider/dispatchers, and several drivers identified the need for adequate training in the use of the tablets and the software in order to get the most out of the system for connecting with riders and scheduling rides, as well as the tablets and the on-board features available to drivers. Some ride providers

have extended this to the notion of common standards and training from customer service, safety, and provision for special needs.

- The need for branding, marketing, and rider/community education. With the restraints of limited funding and a small project window, the OCOCC was not marketed heavily. Providers expressed that this led to some confusion amongst the riders who were chosen to participate. They were unsure what to call the new service. The project did not emphasize marketing because the project was of relatively short duration and limited scale. Although the project did deliver more than the targeted number of rides, marketing was not stressed. Branding, marketing and rider education were identified as essential components for the large scale implementation. Participants noted that this would help everything from coordination among ride providers, to trust and a sense of safety to riders, to improved community awareness and support. Proper branding can also show that everyone is a team and working together so people feel comfortable taking rides outside of their regular ride provider.

- One of the most often-mentioned problems with the project was confusion related to riders receiving automated calls reminding them of their upcoming ride. Most transportation providers also had a reminder system and mentioned that their riders found the automated call confusing. Some feared they might be "getting scammed" and providers feared that riders would cancel or not show for their ride.

- The need to "right size" our system. Project participants felt the dynamic tension between the benefits of "keeping it small" (most providers have a special connection with their riders), while at the same time project participants quickly noted that rider needs cross boundaries and county lines, and a regional approach would have many benefits for the community. Participants desire a system that can get the job done, but not too large or built on non-people-centered practices such as a mandatory "assignment" for rides or other de-personalizing policies.

- The need to navigate varying service models. Each ride provider has a unique model, funding source, and service area. Some offer completely free services, others charge a fee, and a few have the potential to be reimbursed through rider specific programs (ex. Medicaid). Most have paid employees, some function completely off the generosity of volunteer drivers, and a few have a mix of the two. Establishing clear guidelines of what types of rides varying providers can accommodate will help the OCOCC make referrals in the future. Our community may need to establish some common standards that apply to all programs, whether free or fee- for- service, volunteer or paid drivers, etc.

In addition to the items listed above, project participants noted several other issues that simply were not addressed during the project and should be carefully considered in planning the future system. These include:

- The true "burden" of running the OCOCC was not evident during the project. Via Mobility, who already operates a call center, acted as the call center for this project. A variety of disruptions such as phone service issues, software updates, staffing shortages, etc. happened during the project. Via Mobility addressed the issues as part of their larger business operation, and did not allow the disruption to affect this small, short term project. Disruptions arise, and contingency plans will be required for long- term system operation.

- Complex issues of payer sources, eligibility for reimbursement, billing, and blended funding were not addressed. Rides for this Proof of Concept project were generously funded by NADTC, and contracts were flexible enough to provide for a monthly "participation payment" for providers who could not accept per-ride reimbursement, while at the same time provided per-ride reimbursement for those providers who are required to bill in that manner. Overall funding for the system and how funding is managed and accounted for is a significant challenge yet to be addressed.

Overall, the project was a strong success. As an experienced call center operator summarized:

> "All in all, with the short design time and the short implementation period, we did better than expected with portal use, tablet use, sharing rides and riders, and open lines of communication. We learned to work together, and our experience will be of great benefit to the new Mobility Manager."
>
> *Lisa B. Via Mobility*

Next Steps

Plan Adoption

The findings from this report will be incorporated into the Implementation Plan. The current schedule is for the Implementation Plan to be taken to the Larimer County Board of County Commissioners in November 2019 for their adoption. Concurrently, the North Front Range Transportation & Air Quality Planning Council (NFRT&AQPC) will review and adopt by plan by their December 2019 meeting.

Funding and Sustainability

A budget was proposed as part of the Implementation Plan showing the costs to hire a Mobility Manager to oversee the program and purchase trip dispatch and trip discovery software. Part of the presentation to the NFRT&AQPC in November and December 2019 will be to ask for permission to apply for three years of funding through various grant opportunities. This funding would allow the program to develop and build support. A number of additional program ideas, like inclusion of health care providers and Non-Emergent Medical Transportation (NEMT) trips, can continue as the program develops.

Community Engagement

Providers have been involved with the process since the beginning. Concerted effort for feedback from riders, advocates, community members, and additional human service agencies will be important to ensure a successful and appropriate program. The Larimer County Mobility Committee will ensure a focus on community engagement as the process continues.

Additional Communities

The NFRMPO boundaries extend into Weld County with the need for trips increasing between the two counties. Important destinations like Medical Center of the Rockies (MCR) straddle the county boundary, which can be difficult for non-ambulatory, low-income, or other vulnerable populations to cross. The Weld County Mobility Committee and community partners can build on the work done in Larimer County to create a regional program, breaking down additional transportation barriers for residents.