

**COUNCIL ACTION FORM**

**SUBJECT: DEMAND RESPONSE SERVICE (HIRTA) IMPLEMENTATION REPORT**

**BACKGROUND:**

In 2014, staff from the City, Story County, and United Way worked through a series of facilitated discussions with HIRTA, the demand response transportation service provider in Story County. These discussions were held to understand HIRTA's service delivery and the needs of riders and community partners, and ultimately identify actions to improve service. The process resulted in the development of a 23-point action plan.

At the April 14, 2015, City Council meeting, the City Council authorized City staff to again work through a facilitated process with the stakeholders to create a plan to implement the priority action steps identified in the original report. The four priority action steps were:

- Mutually agree that transportation is a partnership and everyone will work collaboratively to resolve issues
- Incorporate enhanced technology in buses/vans for safety and passenger satisfaction
- Employ and retain staff/drivers
- Improve efficiencies in telephone and email system for passengers

Through a series of discussions, plans have been developed to address these key areas. Throughout the process, HIRTA has provided updates as to its progress accomplishing the other components of the 23-point action plan.

The final report is attached. City staff will work closely with HIRTA and other partners through the ASSET process to monitor progress made towards accomplishing the activities outlined in the plan.

Funding up to \$1,500 from the Local Option Sales Tax Fund was authorized by the City Council to cover one-half of the facilitator's expenses, with the remainder coming from the Story County Board of Supervisors. An invoice for one-half of the actual facilitation expenses has been delivered to the City for \$1,250. Story County has been invoiced another \$1,250.

**ALTERNATIVES:**

1. Accept the report and authorize payment to the facilitator in the amount of \$1,250.
2. Do not accept the report, and direct staff to obtain further information.

**MANAGER'S RECOMMENDED ACTION:**

The facilitated development of this implementation plan has provided clearer direction for HIRTA, community partners, riders, and governing agencies to ensure the most effective service possible. HIRTA and other affected organizations have taken steps to implement the 23 action steps. City staff and others will work with affected parties as the remainder of the action steps are implemented to ensure the success of this critical service for the community.

Therefore, it is the recommendation of the City Manager that the City Council adopt Alternative No. 1, thereby accepting the report and authorize payment to the facilitator in the amount of \$1,250.

**Ames and Story County  
Demand Response Service  
Leadership Sustainability Group**

**Final Report**

**And Executive Summary**



**February – September 2015**

# Demand Response Service Leadership Sustainability Group

## EXECUTIVE SUMMARY

The Leadership Sustainability Group was created from the original Demand Response Service Task Force to continue the process improvement project regarding door-to-door transportation services provided for the elderly, disabled and general public in Ames and Story County (as opposed to the Dial-A-Ride service provided to ADA-eligible disabled individuals only). A series of four meetings with representatives from human service agencies/organizations and transportation providers was held from the months of April 2015 through September 2015.

Through the series of meetings, group members were tasked with implementing the top four priority actions from the Demand Response Service Task Force Action Plan<sup>1</sup>. These actions are:

- #2 – Mutually agree that transportation is a partnership and everyone will work together collaboratively to resolve the issues (Partnership Action Team)
- #6 – Incorporate enhanced technology in buses/vans for safety and passenger satisfaction (Technology Action Team)
- #7 – Employ and retain staff/drivers (Staff Resources Action Team)
- #13 – Improved efficiencies in telephone and email system for passengers (Communication Action Team)

An additional action step not included in the top priorities but actively addressed is #23. Funding has been secured to purchase a vehicle to serve the City of Ames dedicated to address unforeseen operational issues and to ensure uninterrupted service.

### **The key recommendations of the Leadership Sustainability Group:**

- **HIRTA needs to communicate its formal and informal complaint processes**
- **Riders and partners need to understand and use HIRTA's complaint processes**
- **Adoption of the Communication Plan by HIRTA Board and continued updates provided to customers, agencies, and other stakeholders regarding policy changes**
- **HIRTA needs to communicate recent staffing and phone improvements, continue to seek feedback, and implement additional improvements.**

**It is important to stress that demand response service in the community is a partnership and the success of its operations is dependent upon open, quality dialog between all parties for the benefit of customers.**

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<sup>1</sup> Action Teams #2 and #13 combined their efforts because their work included similar issues and implementation steps.

Upon the completion of its focused work, the Leadership Sustainability Group will continue its involvement with public transportation through Story County’s Transportation Collaboration.

**SUMMARY OF LEADERSHIP SUSTAINABILITY GROUP RECOMMENDATIONS**

Category	Action
<b>Partnership and Communication Action Team</b>	Communicate HIRTA Service Policies to all stakeholders, including the complaint processes.
	Expand the Transportation Collaboration to include liaison representatives from human service agencies/organizations and provide performance reports on a quarterly basis.
	Agencies are to involve HIRTA with program development or program changes that will affect transportation, prior to implementation.
	Continue to mutually agree that transportation is a partnership and everyone will work collaboratively together to resolve issues.
	Communication Plan implementation by HIRTA.
<b>Enhanced Technology Action Team</b>	HIRTA will continue to research ways to fund additional capital purchases to ensure enhanced technology is implemented into service.
	HIRTA’s partners will provide support letters for funding proposals.
<b>Staff Resources Action Team</b>	Use a Green, Yellow, Red alert system to monitor driver staffing needs.
	HIRTA will consider a sign on bonus and/or employee referral bonus plan for driver recruitment.
	Use an electronic newsletter and social media to aid in communicating service/policy changes.
	Continue to analyze types of rides, riders, and geographical need.
	Identify and consider offers from human service agencies interested in providing training regarding specific customer needs.
	Everyone understands and agrees the client/customer is the Rider and the agency is a Partner.

Leadership Sustainability Group members reported that the process resulted in lessons learned and insights about their work together. This included increased openness, trust, education about transportation, focusing on the common good, and improved problem solving, communication, and relationships. HIRTA has received increased resources and improved recruitment retention as a result of this facilitated process.

# Final Report

## HISTORY AND PURPOSE

In 2014, a Demand Response Service Task Force convened to identify barriers for human services agencies/organizations assisting the elderly and disabled, and to further identify expectations for and solutions to demand response service in the community. This task force developed a 23-point action plan to improve demand response service (see Appendix G). Additionally, a Communication Plan was discussed to ensure healthy, ongoing dialog about issues between all interested parties.

Upon the completion of the task force's efforts, the work products were shared with the task force's sponsors: The Ames City Council and the Story County Board of Supervisors. The task force planning team received approval from the sponsors to develop a Demand Response Service Leadership Sustainability Group to work towards implementation of the four priority actions in the action plan. These actions were:

- #2 Mutually agree that transportation is a partnership and everyone will work together collaboratively to resolve issues
- #6 Incorporate enhanced technology in buses/vans for safety and passenger satisfaction
- #7 Employ and retain staff/drivers
- #13 Improved efficiencies in telephone and email system for passengers

*Partway through, the implementation action teams #2 and #13 combined their efforts after realizing their work included similar issues and implementation steps.*

## LEADERSHIP SUSTAINABILITY GROUP MEMBERSHIP

As with the original task force that developed the action plan, the leadership sustainability group included members from area human services agencies, transportation providers, medical providers, and local funders. The membership included representatives from the following organizations:

- The Arc of Story County
- City of Ames
- CyRide
- Heartland Senior Services
- HIRTA
- Lutheran Services in Iowa
- Mainstream Living
- Mary Greeley Medical Center
- McFarland Clinic
- Optimae Life Services
- RSVP
- Story County
- United Way of Story County
- Visiting Nurse Services

Several of the leadership sustainability group members were also active participants in the Story County Transportation Collaboration

## PLAN OF ACTION IMPLEMENTATION SCHEDULE

The process to begin to implement high priority DRS action items was accomplished through four large-group meetings. The meetings began in April 2015 and concluded in September 2015. Additionally, the action teams met as needed.

<b>Date</b>	<b>Meeting Purpose</b>
April 21, 2015	<b>Meeting #1 –</b> <ul style="list-style-type: none"><li>• Review status of HIRTA and partner progress on actions from original report</li><li>• Break into four action teams to brainstorm further implementation</li></ul>
June 23, 2015	<b>Meeting #2 –</b> <ul style="list-style-type: none"><li>• Review status of HIRTA and partner progress on high priority actions</li><li>• Identify gaps and overlaps between the four action teams; merge two groups that overlapped topics</li></ul>
August 19, 2015	<b>Meeting #3 –</b> <ul style="list-style-type: none"><li>• Review status of HIRTA and partner progress on high priority actions</li><li>• Action team updates and preparation for final reports</li><li>• Transportation Collaboration report and recommendations for sustained Communication Plan</li></ul>
September 23, 2015	<b>Meeting #4 –</b> <ul style="list-style-type: none"><li>• Receive and discuss action team reports for inclusion into final report</li><li>• Discuss next steps to report and use group work and recommendations</li><li>• Receive feedback from DOT and Story County HIRTA board representatives</li></ul>

## MEETING SUMMARIES

### **Meeting #1-**

The first meeting was held on April 21, 2015, at the Ames Public Library. The human services agencies, sponsors, and transportation providers were represented. After a welcome and introductions, the team charter was reviewed with the group. HIRTA representatives provided an overview of the 23 action plan steps proposed at the conclusion of the DRS task force, indicating any progress made on these action plan steps in the time since they were initially proposed. The four priority action steps were discussed, and attendees were broken into action teams each assigned to begin discussing an action step. Each team developed preliminary thoughts for how to address the issue and identified a schedule for any necessary outside meetings prior to the next full group meeting.

**Meeting #2-**

The second meeting was held on June 23, 2015, at the Ames Public Library. The human services agencies, sponsors, and transportation providers were represented. HIRTA provided further updates regarding the progress towards completing the 23 action plan steps. Reports were received from each of the action teams. It was decided by the team at this meeting to merge group #2 (Mutually agree that transportation is a partnership and everyone will work together collaboratively to resolve issues) and group #13 (Improved efficiencies in telephone and email system for passengers), and ask the consolidated group to develop the Communication Plan.

**Meeting #3-**

The third meeting was held on August 19, 2015, at the Ames Public Library. The human services agencies, sponsors, and transportation providers were represented. Each action team reported its progress. The consolidated communication plan team, in cooperation with the Transportation Collaboration, provided a handout entitled “Story County At-a-Glance Transportation Provider Services,” a matrix of transportation providers in the county and the services they provide. This matrix will serve as a reference to ensure that users’ expectations are aligned with the type of service provided by each provider. HIRTA staff provided a further update regarding the progress made towards the action item steps since meeting #2. It was clarified that the riders are HIRTA customers, while the agencies are the community partners. HIRTA is willing to work with agencies to ensure the service meets the riders’ needs to the extent possible, considering government regulations and fiscal constraints. Agencies must work with HIRTA staff directly to get information and make requests rather than going to elected officials with issues. Action teams were asked to prepare written reports for the final meeting to be held in September.

**Meeting #4-**

The fourth meeting was held on September 23, 2015, at the Ames Public Library. The group received an update from the Story County HIRTA Board representative, Wayne Clinton, regarding HIRTA’s efforts to recover from recent flooding of its Ames facility.



## HEART OF IOWA REGIONAL TRANSIT AGENCY (HIRTA) COMMUNICATION PLAN

To improve communications among human service agencies/organizations and transportation providers in Ames/Story County, the Demand Response Service (DRS) task force discussed ways that the respective parties could continue healthy discussions. Four communication processes were identified:

1. **Establish a Formal Complaint Process** – Identify a process that the respective parties could agree upon that would allow for discussions at the appropriate level within their organizations and an appeal process if agreement was not received by the parties involved.
  - If an individual has a complaint or concern, there is an established complaint process within the HIRTA’s RIDERS GUIDE - Service Policies that are listed on HIRTA’s website at [www.ridehirta.com](http://www.ridehirta.com). New clients will receive the policies in their welcome packet. Existing clients will receive notification of the updated policies in their annual survey and may request a copy by calling HIRTA at 1-877-686-0029.
  - If an agency has a complaint or concern, the agency’s liaison for transportation services calls the Customer Service Supervisor directly at (515) 309-9285. If the Customer Service Supervisor is unable to resolve the concern, it will be turned over to the Executive Director or the Operations Manager. If the agency does not believe they have received an adequate resolution to the concern, the agency may follow the formal written complaint process in HIRTA’s service policies. To promote this direct communication with HIRTA staff, a Story County Partner Cover Page for RIDERS GUIDE has been developed to attach to HIRTA’s RIDERS GUIDE - Service Policies to be communicated out to Story County agencies by HIRTA.
2. **Establish Formal Transportation Liaison Representatives** – Human service agencies/organizations should formally establish a transportation liaison representative within their agency/organization to communicate with HIRTA, as well as distribute transportation information within their organization.
  - Staff from agencies who have participated in the DRS task force will be considered the transportation liaison representative for that agency, although the agency may designate other employees as needed. If additional agencies that weren’t involved within the DRS process would like to participate in the quarterly meetings, they are welcome to by indicating their transportation liaison to United Way of Story County. All liaisons will be invited to attend the quarterly meetings of the Transportation Collaboration as mentioned above.
  - HIRTA communicates frequently to riders and partners when events occur that drastically impact transportation services (i.e. flooding, tornado, etc.), effect on level/change of service and action plans.
3. **Establish Response Timeframes** – Develop a standard that all parties would adhere to in responding to concerns via telephone, email or other electronic formats.
  - If an agency has a concern that the Customer Service Supervisor is unable to resolve at the time of the phone call, it will be turned over to the Executive Director or the

Operation Manager. The agency will receive contact back within two business days from a HIRTA representative to attempt to resolve the concern.

4. **Quarterly Meetings** – Schedule quarterly meetings with DRS task force members for subcommittees to share the progress made on the action plan. This will be added to the Story County Transportation Collaboration Committee agendas. Members of the DRS group will be invited to attend these quarterly meetings to remain updated on the progress of the action items. Minutes of these meetings will be posted on a public website, such as the Ames Area Metropolitan Planning Organization (AAMPO) website. The AAMPO is currently responsible for updating the development of a locally-coordinated transportation plan (Passenger Transportation Plan) between Ames’s transportation providers and human service agencies providing service within the Ames community.

## APPENDIX A

### **DEMAND RESPONSE LEADERSHIP SUSTAINABILITY GROUP**

<b>Focus:</b>	Demand Response Service (Non-ADA Door-to-Door transportation) in the City of Ames
<b>Project:</b>	Address action items 2, 6, 7, and 13 identified by the Demand Response Task Force that met from November 2014-January 2015.
<b>Facilitator:</b>	Nancy Franz
<b>Sponsors:</b>	City of Ames and Story County
<b>Action Teams:</b>	<p><b>Solution #2</b> – Partnership Shannon Bardole (UWSC); Julia Castillo (HIRTA); Brian Phillips (City); Laurie Lybarger (HSS); Kalen Peterson (RSVP)</p> <p><b>Solution #6</b> – Technology Brooke Ramsey (HIRTA); Jean Kresse (UWSC); Tricia Crain (The ARC); Roger Kluesner (McFarland); Anna Vaughn (VNS)</p> <p><b>Solution #7</b> – Staff Resources Brooke Ramsey (HIRTA); Amber Suckow (LSI); Sheri Kyras (CyRide); Michelle Van Maaren (Optimae Life Services); Karen Kiel Rosser (MGMC); Deb Schildroth (County)</p> <p><b>Solution #13</b> – Communication Amber Hill (HIRTA); Shannon Bardole (UWSC); Kathy Jepsen (VNS); Arti Sanghi (RSVP); Kris Eastman (Mainstream); Shari Atwood (CyRide);</p>
<b>Boundaries and Parameters for Action Teams:</b>	<ul style="list-style-type: none"><li>• Action teams will meet as agreed upon during the April 2015 to work through identified action items that will lead to the solutions desired by the Demand Response Task Force.</li><li>• Action teams will meet with the Facilitator and report out to all teams at meetings that will be schedule in April, June, and August 2015. A final meeting will be held in September 2015 to present final reports and action plans.</li><li>• Challenges, solutions and expectations will be consensus driven and achievable by the transportation providers.</li><li>• A global perspective will be maintained when making decisions.</li><li>• Discussions will be respectful of all individuals and organizations and focus on the challenges and not personalities.</li></ul> <p><i>A Planning Team will meet in March, May, July and September to coordinate and facilitate the action team meetings. The Planning Team is made up of the Facilitator, City of Ames, Story County, and UWSC staff.</i></p>
<b>End Product:</b>	Completion of Action Items Plans in Solutions 2, 6, 7 and 13: <ul style="list-style-type: none"><li>• Implementation plans and solutions will be identified in a final report to be presented to the Ames City Council, the Story County Board of Supervisors, and HIRTA Board of Directors in October 2015.</li></ul>
<b>Starting and Ending Dates:</b>	The task force start date is April 2015 with recommendations prepared on or before September 30, 2015.

**APPENDIX B**

**Story County At-A-Glance Transportation Provider Services (as of 8/27/2015)**

Provider	HIRTA	Dial-a-Ride	CyRide	Access2Care	RSVP	Taxi	Executive Express
Service Focus	Story County Public Transit	Bus Transit for Individuals with Disabilities	Ames Public Transit	Non-Emergency Transportation contracted provider for Medicaid Clients	Volunteer drivers, priority of medical trips	Taxicab Services	Airport Shuttle
<b>Service Area</b>							
Ames Only		x	x				
All of Story County (including Ames)	x			x	x	x	
Des Moines	x			x	x		
Iowa City (Medical)	x			x			
DSM Airport Shuttle						x	x
Other Outside County Trips	x			x	x		
<b>Client Criteria</b>							
Open to the General Public	x		x			x	x
Story County Resident					x		
Must be Ambulatory (able to board without assistance)			-		x		
Application/pre-approval required		x		x	x		
Medicaid Clients Only				x			
ADA Eligibility Required		x					
<b>Extent of Services</b>							
Door-to-Door	x	x		-			
Curb-to-Curb Only					x	x	
Wheelchair Accessible	x	x	x				
Fixed Routes/Designated Stops			x				
Senior/Disability Discounts	x	x	x				
<b>Schedule and Availability</b>							
Need 24 hours notice	x	Day Before; by 4:30pm		x			x
Need 48 hours notice					x		
No Notice Needed			x			x	
M-F Only (Daytime Hours)				x	x		
7 Days a Week (Hours Vary)	x	x	x			x	
Some Holiday Limitations*	x	x	x		x		
24 hours/day; 7 days week						x	x
*HIRTA, CyRide, and Dial-a-Ride's holidays are New Year's Day, Memorial Day, Fourth of July, Labor Day, Thanksgiving, and Christmas							
<b><i>There is a wide range in trip costs depending on the provider and available discounts. Hours of operation also vary greatly. Please call the appropriate provider to access this information.</i></b>							

## APPENDIX C

### PARTNERSHIP (ACTION ITEM #2) AND COMMUNICATION (ACTION ITEM #13) TEAM REPORT AND RECOMMENDATIONS

Committee Members: Kalen Petersen and Arti Sanghi (Central Iowa RSVP), Brian Phillips (City of Ames), Shari Atwood (CyRide), Liz Beck and Laurie Lybarger (Heartland Senior Services), Julia Castillo (HIRTA), Kris Eastman (Mainstream Living), Shannon Bardole (United Way of Story County)

#### Committee Activities

- April 21: The Community Partnerships action team discussed development of an At-A-Glance document to help clients determine the right type of ride. The Communications action team discussed a potential survey to HIRTA clients to determine what they believe the communications issues are. This questionnaire is not being distributed to the ridership as a stand-alone survey; instead, some questions will be incorporated into the annual survey of all clients.
- May 13: The Community Partnerships action team reviewed the At-A-Glance document and turned it over to the Transportation Collaboration. Discussion was held on how to educate the client to notify both HIRTA and the agency they're getting a ride to that they are canceling their participation that day. Discussion included that clients cancel a ride before HIRTA's office is open. A message must be left on HIRTA's answering service to be considered a legitimate cancellation and not a no-show.

The Communications Action Team (a separate team until July 24) revealed through its discussions that HIRTA had implemented several significant updates to its phone system as well as staffing levels for improved communications with the public. These improvements were:

- **Staff Changes**
  - Cross-trained office staff to help answer scheduling phones (mid/late 2014)
  - Three full-time schedulers and department supervisor hired (October 2014)
  - Added additional full-time scheduler to cover illness, vacation, etc. (June 2015)
  - Assigned Amber Falls to be the emergency contact for Story County agencies
- **Phone System Update (mid/late 2014)**
  - Security features added to the phone system, including backup and server restrictions
  - Forwarding calls to the Story County dispatch office was added
  - **Automatic Call Distribution System** added to phone system

- ✓ **Time in Queue** – shortened from 15 minutes to 5 before offering an option to transfer to Story County dispatch
- ✓ **Option to transfer** to Story County dispatch, then to voicemail
- ✓ **Information messages added** (potential inclement weather cancellations, tips/tricks to ride the bus, upcoming special trips, etc.)
- ✓ **Music added** between announcements (prior to this addition, hold time was dead air)
- ✓ **Queue settings** – Discovered passengers have four options for the queue if a button is pressed on the phone when waiting to talk to a live person:
  1. **Have call hang up** (HIRTA does not want caller to be hung up on)
  2. **Transfer call to voicemail** (HIRTA wants to take every available opportunity to ensure the customer reaches a live person before resorting to sending a call to voicemail)
  3. **Transfer call to extension** (HIRTA wants caller to feed to scheduling/dispatching and transferring to another extension is not an effective first option as schedule information staff are already busy with other callers. This is currently set up as a secondary option activated after a five-minute hold, allowing the caller to bypass to Story County dispatching office if available or to voicemail if not available)
  4. **Transfer call to beginning of queue** – This is the current setup, providing the best assurance the call will ultimately reach a live person, but delaying a response if the caller presses buttons on their phone
- Added automated notification system that calls customers a day in advance of trip; keeps customers up-to-date with scheduled trip and provides a way to cancel a trip. There were technical issues with the initial launch; updated in March 2015
- Phone reports are available – these are limited, but HIRTA can manually pull/review call statistics on a daily basis. It includes the time of day when waiting times are an issue, which can be used to determine where more assistance from phone staff is needed

The implementation of all these improvements left the Communications Team to wonder if there were any lingering communications issues and recommended a draft communications survey (see April 21 meeting summary). HIRTA recommended incorporating a few of these questions into its annual survey as its

clients had already been surveyed several times during the year, and HIRTA wanted to avoid excessive survey burden

- June 17: The Community Partnerships team reviewed the HIRTA Service Policies, which communicates how to use its services. This document needs to be shared with agencies
- July 24: The Communications and Community Partnerships groups merged. This group discussed the communication plan. A Frequently Asked Questions document was requested to provide additional information to agency liaisons
- August 11: It was recommended that a separate one-page document accompany the service policies to give to agencies, since it doesn't make sense for HIRTA to have separate service policies just for Story County
- September 17: The Communication Plan was drafted

## **Recommendations**

### **Recommendations for HIRTA:**

- Incorporate questions from the Communications group into the annual client survey and report back to the group which questions were utilized
- Communicate significant phone/staffing improvements to customers and partners via an electronic newsletter or other means
- HIRTA Service Policy communicated to:
  - Boards (CyRide, ASSET funders) on a quarterly basis
  - Customers when initially added as a customer then annually
  - Expanded Transportation Collaboration Liaison Representatives on a quarterly basis
  - Human Services Council on a quarterly basis (as well as add a link on its website)
- Relay issues related to lack of drivers to agencies: be proactive in filling vacancies
- Performance report provided during quarterly Expanded Transportation Collaboration (ETC) meetings (Action Item #10)
- List fares and where to buy tickets on HIRTA's website and in the riders guide
- Create an FAQ document with transportation liaisons through the ETC group. Post the document on the HIRTA website

### **Recommendations for the Story County Transportation Collaboration:**

- Expand meetings to add liaison representatives from area agencies/organizations on a quarterly basis. These Expanded Transportation Collaboration meetings should begin in January 2016. The Transportation Collaboration will still meet monthly

### **Recommendations for Customers:**

- Follow formal and informal processes for complaints rather than going immediately to elected officials

### **Recommendations for Community Partners:**

- Now that HIRTA's service policies have been updated, Dial-a-Ride policies can be updated
- Human service agencies/organizations should allocate a transportation liaison for their organization and provide a general e-mail address for the organization in case the liaison leaves the organization. The liaison should attend quarterly ETC meetings for updates to provide feedback
- Other agencies providing transportation services should report changes to HIRTA
- Agencies need to involve HIRTA up front when considering changes to hours of operations, programs, construction, additional locations, change in service area, or anything else that may affect transportation

### **Recommendations for Decision Makers:**

- If contact is received from individual clients, ask if they called HIRTA or filed a written complaint rather than trying to determine the actual issue and advocating on their behalf. The complaint process is explained in the HIRTA service policies
- Keep online links to service policies (HIRTA and Dial-A-Ride), so the most updated can be referenced, not just a hard copy that could be outdated

### **Lessons Learned, Insights, and A-ha Moments**

- Communication and education are what allow agencies to work in better collaboration with each other. There was a lot of information that it was assumed agencies knew, but that was not the reality. Working relationships are stronger through this communication
- HIRTA has made substantial investments in upgrading equipment: replacing a light-duty bus, securing an unscheduled minivan, tablets for more efficient operations on buses



## APPENDIX D

### ENHANCED TECHNOLOGY (ACTION ITEM #6) TEAM REPORT AND RECOMMENDATIONS

Committee Members: Brooke Ramsey (HIRTA), Jean Kresse (United Way of Story County), Roger Kluesner (McFarland Clinic), Anna Vaughn (Visiting Nurse Services), Tricia Crain (Arc of Story County)

#### Committee Activities

- The committee met on May 13. Subsequent communication and material reviews were done via email. Discussion included replacement driver tablets, security cameras, grant opportunities, and local endowments. United Way of Story County and the Arc of Story County have volunteered to partner with HIRTA as a fiscal agent for grants not available to governmental agencies.

#### Recommendations

##### **Recommendations for HIRTA:**

- Continue to research ways to fund additional capital purchases to ensure enhanced technology is implemented

##### **Recommendations for the Story County Transportation Collaboration:**

- Help communicate technology changes implemented by HIRTA to agencies and riders

##### **Recommendations for Customers:**

- Support HIRTA by contacting local, state, and federal officials to communicate the need for future transit funding

##### **Recommendations for Community Partners:**

- Provide letters of support for future grant applications. A sample letter is available. Please contact Brooke Ramsey at HIRTA for more information

##### **Recommendations for Decision Makers:**

- Develop a resource recovery process to educate stakeholders and agency program managers to allow everyone to follow the same process

#### Lessons Learned, Insights, and A-ha Moments

- The ability to partner with agencies as a fiscal agent for technology capital purchases was something HIRTA had not previously considered
- Education to other agencies on the need for enhanced security on buses was helpful, as well as learning the use of security cameras is a common practice in the transit industry
- The process increased awareness of the need for tablets in the buses, ultimately aiding HIRTA in becoming a grant recipient of United Way of Story County with tablets implemented in buses effective March 1, 2015 and the purchase of HIRTA's notification module. A second grant was awarded from United Way of Story County, allowing HIRTA to purchase camera systems for seven vehicles

## APPENDIX E

### STAFF RESOURCES (ACTION ITEM #7) TEAM REPORT AND RECOMMENDATIONS

Committee Members: David Hansen (HIRTA), Amber Suckow (LSI), Sheri Kyras (CyRide), and Deb Schildroth (Story County)

#### Committee Activities

- The committee met on April 21, May 12, and July 28. Discussion included driver training, service expansion, recruiting/retaining drivers, the marketing plan, and communication with human services agencies

#### Recommendations

##### **Recommendations for HIRTA:**

- Utilize the Green/Yellow/Red system to monitor the need for drivers (see Appendix F)
- Consider an employee referral bonus plan
- Consider a sign-on bonus plan
- Utilize a quarterly newsletter and/or Facebook postings to aid in communicating changes, updates, etc.
- Meet with human services organizations to review new driver training and spend focused time on areas that impact clients/customers served by HIRTA and human service organizations
- Communicate the HIRTA complaint process through the Transportation Collaboration, Human Services Council, to elected officials and boards, etc.
- Accept offers from human service organizations interested in providing training regarding specific client/customer needs

##### **Recommendations for the Story County Transportation Collaboration:**

- Continue to meet regularly to serve as the communication hub for transportation providers and human service organizations in Story County
- Create a calendar that lists the quarterly expanded liaison (January, April, July, October) meeting topics and communicates it to partners

##### **Recommendations for Customers:**

- Remember the rider is the client/customer; the agency is the community partner
- When needing to convey a concern to HIRTA, use its established complaint process; seek someone to provide assistance to you only if needed

##### **Recommendations for Community Partners:**

- Remember the rider is the client/customer; the agency is the community partner

- When needing to convey a concern to HIRTA, use its established complaint process
- Involve HIRTA in agency planning processes and communication channels when changing services, programs, etc.

**Recommendations for Decision Makers:**

- Continue coordinating planning and funding to meet present and future public transportation demands
- Communicate federal, state, and local changes that could impact the delivery of transportation services
- Help citizens and constituents understand the importance of communicating concerns and complaints directly to HIRTA

**Lessons Learned, Insights, and A-ha Moments**

- Everyone involved with this process is looking out for their clients' best interests
- How public transportation is provided has changed and aligns with the expectations of federal and state regulations

**APPENDIX F**

**HIRTA DRIVER MARKETING PLAN**

<b>Response Needed</b>	<b>Current Status</b>	<b>Marketing Strategies</b>
Maintain Current Status	<ul style="list-style-type: none"> <li>✓ Fully staffed</li> <li>✓ Enough staffing for growth</li> <li>✓ Patrons are getting where they need to go, when they need to get there</li> </ul>	<ul style="list-style-type: none"> <li>✓ Advertising on buses</li> </ul>
Urgent	<ul style="list-style-type: none"> <li>✓ Short 1-3 drivers</li> <li>✓ Unable to take on new patrons</li> <li>✓ Rides are delayed due to driver shortage</li> </ul>	<ul style="list-style-type: none"> <li>✓ Advertising on buses</li> <li>✓ External advertising (ISU job board, paper, Facebook, etc.)</li> <li>✓ Attending job fairs</li> <li>✓ Put employee referral bonus in place</li> </ul>
Immediate	<ul style="list-style-type: none"> <li>✓ More than 3 vacant positions</li> <li>✓ Unable to take on new patrons</li> <li>✓ Rides cancelled due to driver shortage</li> </ul>	<ul style="list-style-type: none"> <li>✓ Advertising on buses</li> <li>✓ External advertising (ISU job board, paper, Facebook, etc.)</li> <li>✓ Attending job fairs</li> <li>✓ Hold open interviews</li> <li>✓ Put employee referral bonus in place</li> <li>✓ Put sign-on bonus in place</li> </ul>

**APPENDIX G**

**DRS ACTION PLAN FOR STORY COUNTY PROGRESS REPORT**

Revised June 2015 in red

Revised August 2015 in blue

(Follows on next page)

# Demand Response Service Action Plan for Story County

## Progress Report

**Goal: Improve transportation efficiency and effectiveness of demand response public transit service through enhanced communication and relationships across partners as well as improved transportation infrastructure.**

Action #	Category or Theme	Solutions	Action	HIRTA Progress
<b>Community Partnerships</b>				
1	I	Explore more effective short term and long term solutions for the use of resources with partners (i.e. ISU, taxi's, assisted living facility and agency/organization vehicles)	<ul style="list-style-type: none"> <li>• Schedule a meeting with human service agencies/ organizations and transportation providers to discuss current gaps and capacity in transportation services</li> <li>• Complete a trial period for group's recommendations</li> </ul>	Sarah, HIRTA's mobility coordinator, is ready to begin Train-the-Trainer for Travel Training, to agencies who need this type of service, to assist people in how to ride both HIRTA and CyRide. We will be a guest speaker at an upcoming meeting with MGMC to discuss nursing home transit issues, and how their staff can be part of the solution. We just met with MGMC, and McFarland to discuss how we can better work together and how staff from each of our agencies can make the process run more smoothly. We have representation at the Human Service, Transportation Collaboration, and Senior Collaboration meetings. We highly encourage other agencies to attend the Transportation Collaboration meeting so all gaps are identified. No Update
2	A	Mutually agree that transportation is a partnership and everyone will work collaboratively together to resolve issues	At close of task force meetings, all members will agree to move forward in a positive manner	I believe this is happening and people are remaining positive and open to exploring options, realizing that transit can't resolve all issues, and it take other agencies staff to be part of the solutions too. No Update
3	A	All partners hold each other to the same expectations for a mutually beneficial relationship	Set a meeting to establish joint expectations that will allow for timely service and/or implement communication plan, if appropriate	Meetings are being held with the various groups, and there is discussion of ideas and solutions. Some agencies have been very supportive following the task force meetings and those on the current sub-groups have taken action showing support especially with staff education. This is greatly appreciated and makes for strong partnerships. No Update
4	A	Involve all partners upfront in program development	Establish a formal communications process to discuss human service agency/organization policy/program changes at the planning stage, that will impact transportation needs of passengers	This will be an ongoing process, however, it may be beneficial to look at creating something that ensures transportation is involved during the planning stage, so that even with staff turnover, that very important component doesn't get overlooked. The Community Partnership group will add this to our next meeting agenda.  Committee is working on this and will give an update during Committee Reports.

Action #	Category or Theme	Solutions	Action	HIRTA Progress
<b>Infrastructure Improvements</b>				
5	I	Improve physical condition of buses	<ul style="list-style-type: none"> <li>• Communicate HIRTA's plan to update buses to partners</li> <li>• Develop grass root support for an adequately-funded bus replacement program</li> <li>• Determine if newer, used buses are available for purchase to reduce their fleet age</li> <li>• If feasible, develop a used bus purchasing program for vehicles outside of Iowa to systematically improve fleet conditions</li> </ul>	<p>There are a lot of Federal regulations on bus purchases and replacements. However, HIRTA would be very willing to work with other agencies, or entities, such as the City of Ames, Story County to discuss options for purchasing smaller vehicles, such as mini-vans, which would be more affordable and work better with trips that need more specialized attention, such as Hospital Releases, Dialysis, etc.</p> <p>Within the next month we will be placing a 1 new bus in service in Story County.</p> <p>Leasing vehicles, is another option we will be looking into in the new Fiscal Year to see if that is a viable, cost efficient option for operation.</p> <p>2 new buses have been put into service in Story County within the past month</p> <p>On 8/22/15 we have a group of ISU volunteers who have taken on the project of cleaning the insides of the buses.</p>
6	I	Incorporate enhanced technology in buses/vans for safety and passenger satisfaction	Research need for and cost of equipping all Story County buses with communication and safety technology	<p>All HIRTA vehicles now have tablets. We are now looking at funding to place surveillance cameras in all vehicles. We are currently applying for 2 separate grants as part of the current subgroup and through partnerships created by the task force, so expect we will be able to purchase and install cameras within 4-6 months.</p> <p>Received a UWSC grant \$24,580 to purchase cameras. We did not receive the Story County community foundation grant. We are continuing to apply for other grants so we can have cameras on our entire Story County fleet. We would appreciate letters of support to add to additional grant applications.</p>

Action #	Category or Theme	Solutions	Action	HIRTA Progress
<b>Infrastructure Improvements</b>				
7	I	Employ and retain staff/drivers	Identify creative approaches to fully staff (employ and retain) its driver positions	<p>We are at a sustainable driver staffing level now, however, we will continue to recruit so that we can add additional services and have sufficient staff to cover vacations, extended illness/injury, etc. We have added Des Moines medical trips back into service twice per week.</p> <p>We are once again in need of drivers. Several of our summer drivers are no longer with us, and we have had a few medical leaves too. It is tight, but we are currently getting by.</p>
8	I	Explore the possibility of having a wheelchair on every bus	Complete an analysis of if/how wheelchairs can be purchased and secured on each vehicle	<p>This is still an issue that needs further discussion because it is not as simple as having a wheelchair on the bus. We will continue to discuss and explore options. This has a direct impact on operations and increases the cost per trip due to transferring of wheelchair. There is also a direct impact on customer comfort and poses liability risks in transferring people from one wheelchair to another, not to mention upkeep cost. We also may not be able to adequately secure unoccupied wheelchairs due to current layout of some of our vehicles.</p> <p>No Update</p>
<b>Internal Modifications for HIRTA</b>				
9	A or I	Implement a process improvement program and make changes as appropriate	<ul style="list-style-type: none"> <li>Identify the systems to be reviewed</li> <li>Report to HIRTA board at completion of changes, with copies to funding agencies</li> </ul>	<p>Not exactly sure what this means. We have and will continue to report to the Board about the progress of this Demand Response Service Action Plan for Story County.</p> <p>If there are more specialized services needed, we may or not be able to accommodate those with our current resources due to FTA compliance. However, we are also willing to discuss special services.</p> <p>No Update</p>



Action #	Category or Theme	Solutions	Action	HIRTA Progress
<b>Internal Modifications for HIRTA</b>				
10	A	Set and monitor performance standards	Develop a report and standards for system performance, such as average length of telephone calls, average hold time, email response time and establish a formal, written complaint system	HIRTA has to assure compliance for some of these measures already due to ADA, so there are already performance standards in place for these measures. We also have already have a written complaint process too. We have been working more closely with individual users on customer accountability, after reviewing additional reports more frequently. The Case Managers have been especially helpful, working to get chronic no-shows / excessive Cancellations and behavioral problematic customers on board with using the service correctly. This has freed up some space in the schedules and has allowed the bus to stay on schedule
11	A	Provide a person to address passenger's failed trip needs	Better utilize the Mobility Coordinator	We do track trip issues, those we cannot accommodate, those we currently don't have a service for etc. Amber Falls reviews reports monthly reports and we also do semi-annual unmet needs assessments and have changed services, like the Des Medical trips because of these reviews. In addition we also do annual surveys and gather information from Human Service and other meetings. HIRTA already gathers information in a number of way, however, always willing to entertain other ideas. No Update
12	I	Dedicate a telephone line for the agencies/organizations to contact that would have direct access to a staff person for immediate concerns	Modify the telephone system to accommodate additional line and develop internal structure to answer in a timely manner	As has been stated before Amber has a direct line. We also have 3 Customer Service reps who answers phones. We will be adding phone call questions to our Annual survey which will be going out in early September.
13	I	Improved efficiencies in telephone and email system for passengers	Examine current systems for improvement opportunities	Amber has been scheduled to attend the RouteMatch conference in October and she will learn about online payment and trip request options.

Action #	Category or Theme	Solutions	Action	HIRTA Progress
<b>Internal Modifications for HIRTA</b>				
14	I	Increase use of personal care attendants/ride-a-longs with passengers	Identify a support system of personal care attendants/ride-a-longs that can ride with passengers who are unable to be responsible for their safety & comfort during their transit trip; identify cost for program i.e. explore who could be volunteers	<p>HIRTA already allows Personal Care attendants to ride free. We would be happy to work with an agency that would like to develop a volunteer program where vulnerable passenger could have someone ride with them and stay with them during their trip. We may even consider operating such a program through HIRTA if the committee would like to research how that could be done, and at what cost.</p> <p>No Update</p>
15	A	Provide training on passenger context/needs for HIRTA staff and drivers	Review current HIRTA staff training and develop systems to “fill in the gaps” so that HIRTA staff provide polite and passenger-focused transportation	<p>This task force has helped and we support all agencies engaging in the process for businesses. HIRTA is very customer service focused and we recently upgraded our driver training program through assistance of Iowa DOT/OPT and worked with another provider to get a train-the-trainer program on de-escalation specific to persons with disabilities. Perhaps a group training, including all participating agencies would be beneficial so that we have another platform to work together and learn from each other. There is always room for improvement even with the best of employees.</p> <p>No Update</p>
16	A	Set and monitor passenger standards	Develop a system to classify appropriate response to passenger behaviors	<p>HIRTA recently had a train-the-trainer program on de-escalation specific to persons with disabilities.</p> <p>No Update</p>

Action #	Category or Theme	Solutions	Action	HIRTA Progress
<b>Internal Modifications for HIRTA</b>				
17	A	Establish method(s) to provide drivers/staff with additional information regarding passenger needs so that their trip is enjoyable and safety is enhanced	Review current software program to determine if additional information could be accommodated within role/context of HIRTA/personal care attendant	<p>We have a very sophisticated scheduling software program and can add customer specific information as needed if it appropriate to their specific trip.</p> <p>No Update</p>
18	I	Localized reservation system	Determine whether reservations for Story County could move from Urbandale to Ames	<p>We are doing more cross-training, and have upgraded the software which has upgraded the GPS, and we now also have tablets so drivers can better find addresses, and HIRTA staff, no matter located, can track a vehicle. There is a lot of logistics that go into scheduling a trip, and we use every method available to ensure we perform trips in the most efficient order.</p> <p>No Update</p>
<b>Partner Role Clarity</b>				
19	I	Develop a Passenger and Caregiver User's Guide for use to establish expectations, educate passengers and passenger families on transportation services	Develop a written document that identifies policies, expectations, rider tips, contact information, etc.	<p>We have a Riders Guide and welcome one of the subgroups to review it to ensure it is easily understandable to the various demographics we serve. We are also developing a new customer welcome packet, and will have various resources in the packet for them to review so they better understand how to use HIRTA. We plan to have the welcome packet finished by 9/30/15.</p> <p>Riders Guide is / has been reviewed and is being updated. Our Welcome Packet is on track for being ready to distribute in September. More will be discussed during the Committee updates.</p>

Action #	Category or Theme	Solutions	Action	HIRTA Progress
<b>Partner Role Clarity</b>				
20	A	Share information on federal law interpretation related to transportation/passenger relationship (i.e. funding requiring community inclusion of passengers)	Annually, the Transportation Collaboration Committee will hold a meeting on transportation program changes with agencies/organizations	We totally support this  No Update
21	A	Discuss and solve issues at the grass roots level with the people directly involved in the issues	Mutually agree to respect the chain of command in respective agencies/organizations and resolve issues at the lowest level	We totally support this and would like to reiterate that this goes both directions. Every issues is not a transit issue and we need every agency to educate staff, and utilize their staff to make transportation more efficient for their customers too. We have experienced improvement with Agencies contacting the right people since the start of this task force. More will be discussed during the Committee updates.
22	A	Discuss and solve issues at the management level with managers that are directly involved in the actions	Annually meet to resolve issues	We totally support this. Some items may need more frequent meetings to continue to move forward. More will be discussed during the Committee updates.
<b>Service Improvement</b>				
23	I	Dedicate one bus each day (unscheduled) to address unforeseen operational issues to ensure smooth operation of service	Hire adequate driving staff and secure a vehicle to implement service	This is making progress. We are just waiting for the final funding piece from Iowa DOT/OPT, and if that is approved we should have this operational within a couple months. CyRide, UWSC, City of Ames, Story County, and HIRTA developed a partnership to make this possible. Received funding approval from UWSC for \$9,653 as Match funding for this project. Now waiting on IowaDOT/OPT and CyRide to order vehicle.

# HIRTA PUBLIC TRANSIT

Story County agencies are encouraged to communicate any transportation concerns regarding HIRTA directly with HIRTA's Customer Service Supervisor! The staff member is Story County agencies' first point of contact to voice a concern. If your agency is helping clients reserve/schedule rides on HIRTA, cancel rides or file a concern/complaint, please continue to call HIRTA's Trip Info line at 1-877-686-0029 for these individual concerns. An updated HIRTA RIDERS GUIDE – Service Policies is also attached.

**HIRTA Central Office (Urbandale) Hours:** Weekdays 7:00am – 5:00pm

**HIRTA Service Hours:** Weekdays (Story County): 7:00 am – 5:30 pm

Weekdays (Ames Only): 6:00 am – 8:00 pm

Saturday (Ames Only): 7:30 am – 6:00 pm

Sunday (Ames Only): 8:30 am – 6:00 pm

**Trip Info (reservations, where is the bus, cancel ride, passenger concerns/complaints, etc):** 1-877-686-0029  
OR [erides@ridehirta.com](mailto:erides@ridehirta.com)

## **DIRECT CONTACTS (FOR AGENCIES ONLY!)**

### **1. Agency Concerns, Complaints, Special Requests, Reasonable Modification Requests**

**Customer Service Supervisor:** Amber Falls 515-309-9285 [afalls@ridehirta.com](mailto:afalls@ridehirta.com)

### **2. Additional Contacts:**

Operations Manager: Brooke Ramsey 515-309-9282 [bramsey@ridehirta.com](mailto:bramsey@ridehirta.com)

Executive Director: Julia Castillo 515-309-9281 [jcastillo@ridehirta.com](mailto:jcastillo@ridehirta.com)

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**FARES:** \$2.00 in town / one way trip

\$4.00 in county / one way trip

\$10 to Des Moines (Mon and Wed) roundtrip

\$10 to Iowa City (1<sup>st</sup> Tuesday of Month) roundtrip

These are general public fares. It is always best to call about fares because a rider may qualify for other funded programs and receive service at a lower cost.

Location(s) to purchase tickets in Story County: HIRTA Office located at 721 E. Lincoln Way, Ames, IA. Tickets can also be purchased by mailing a check to HIRTA's Central Office located at 2824 104<sup>th</sup> St, Urbandale, IA 50322

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### **Expanded Transportation Collaboration (ETC) Quarterly Meetings for 2016:**

The Transportation Collaboration requests that agencies concerned with transportation, establish a transportation liaison to attend quarterly ETC meetings, obtain transportation updates and then communicate these to their organization. Individuals already involved in the initial Demand Response Service taskforce have already been added as liaisons and will be invited to ETC meetings. ETC will meet quarterly at United Way of Story County Offices (315 Clark Ave., Ames, IA 50010) on the second Wednesday of the month at 3:00pm. Liaisons are welcome discuss transportation issues they have and learn of transportation updates from HIRTA, RSVP and CyRide.

- January 13
- April 13
- July 13
- October 12

If your organization/agency would like to receive updates regarding transportation and establish a transportation liaison(s) to attend ETC meetings, please contact United Way of Story County at [unitedway@uwstory.org](mailto:unitedway@uwstory.org) or (515)268-5142.

**IMPORTANT REMINDER:** Changes at your agency may affect Transit and HIRTA's ability to provide efficient, timely service. Even minor changes can affect service, so please notify HIRTA by contacting Julia Castillo or Brooke Ramsey about current or expected changes such as:

- Agency remodeling/construction (changing entrances, overhangs, parking lots, etc.)
- Change in program and/or service hours
- Additional programs or locations

This document will be updated and distributed by HIRTA annually.

The information contained in this document does not apply to Dial-A-Ride service.