



Coordination Opportunities

Coordination is a technique for better resource management in which improved organization strategies are applied to achieve greater cost-effectiveness in service delivery. Coordination is about shared power, which means shared responsibility, shared management, and shared funding.

Coordination of transportation services is best seen as a process in which two or more organizations interact to jointly accomplish their transportation objectives. Coordination is like many other political processes in that it involves power and control over resources and coordination can be subject to the usual kinds of political problems and pressures, such as competing personalities and changing environments.

Coordination can be used to improve transportation system performance by eliminating duplicate efforts and improving the efficiency of transportation operations. Coordinating transportation means doing better with existing resources. It requires working together with people from different agencies and backgrounds. Coordination has been said to be the best way to stretch scarce resources and improve mobility for everyone.

The fundamental goals of coordinated transportation systems are to increase the number of people served and the number of rides provided with existing resources. Coordination achieves these goals through better resource management.

HISTORY OF COORDINATION

The concept of coordination has been promoted since the late 1960s; however, it was not until recently that a real push for coordination, emphasized at the federal level, has been observed. More and more communities are realizing the scarcity of resources (fuel, vehicles, drivers, and funding) and that the cost-effective and efficient delivery of services is vital if local communities are to continue to ensure

access to vital human services, employment, recreation, and other opportunities and needs. Coordination should be looked at as a step-wise effort. It takes a firm understanding of local needs and resources to develop a plan that, in the end, increases the mobility of residents.

Levels of Coordination

There are varying levels of coordination across a broad spectrum of operating scenarios. Levels can range from very low levels of coordination, such as sharing rides on several different vehicles, to intensive levels such as shared vehicles, shared maintenance, a brokerage established for all agencies, and others. It is important that the Working Group, stakeholders, and public in the Central Peninsula and Southern Peninsula areas understand that coordination of services generally may take some time and effort on the part of the local human service agencies and providers, especially given that several different government and tribal affiliations are involved.

Coordination has been interpreted as everything from telephone conversations to transfer of vehicle ownership. There are four different phases or levels of coordination with regard to the shared use and efficient operation of equipment and facilities. These levels are defined below:

- a. Communication** involves recognition and understanding of a problem and discussion of possible solutions. This improves the working relationships among various organizations that are in a position to influence transportation developments within their particular jurisdiction.
- b. Cooperation** involves the active working together of individuals in some loose association in a cooperative way. The individuals or individual agencies retain their separate identities.
- c. Coordination** involves bringing together independent agencies to act together in a concerted way, to provide for a smooth interaction of separate units of a transportation system. In coordination, the primary concern is in regard to common funds, equipment, facilities, or operations. Members or agencies preserve their separate identities.
- d. Consolidation** involves joining together or merging agencies for mutual advantage. In the case of transportation services, consolidation is used in reference to a fully integrated transportation system in which the individual entities have been combined or consolidated into one integrated public transportation system. Individual agency identity for the purpose of transportation is no longer maintained.

Locally, there is already coordination occurring among agencies. In the Central Peninsula area, CARTS is a coordinated service, and beyond the services CARTS provides, there is a fair amount of coordination in grant writing. In the Southern Peninsula area, cooperative actions are taking place with the Independent Living Center's cab voucher program. The goal is to build on the existing successes in both areas, improving existing and extending additional services to both areas' customers.

Table VI-1 shows a full range of possible coordination activities in an abbreviated format. Additional descriptions of many of the coordination activities follows in the next section.

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**Table VI-1
Possible Coordination Activities**

Concept	Description
Joint Public Relations/Marketing Concepts	
Inclusive Brochures	Like a referral or a recommendation, information for another local human service provider(s) is included on an agency's own brochure. This sort of coordination can be accomplished generally cost free, since it is limited to agencies already printing service brochures. There is no need for any management or oversight of this effort, and agencies have the freedom to choose which agencies to reference on their own brochures.
Common Brochures	This is a single brochure describing the different services available in the area. This common marketing material would distill the information of each provider into a brochure designed for broad distribution to potential users. It requires numerous decisions about what information will be included and how it will be presented.
Information Phone Line - Call Center	A shared informational telephone line provides potential users with the most convenient access to information on all transportation services in the area. The creation of a shared phone line is the most extensive of the efforts suggested under joint public relations because it would require a dedicated and knowledgeable customer service representative to answer the phone line. The phone number for this line could be distributed with all informational and marketing materials regarding transportation services.
Resource Manual	This would describe all of the services available in the area. Such a manual could be distributed to transit riders, transit agencies, and other human service agencies serving transit-dependent clients. This would contain more information than a brochure and might be printed in a full-sized format.
Web Site	A website can serve both as a marketing tool and as a warehouse of information for potential riders. The design of the site should reflect the theme of the common brochure, but it could also provide access to all of the information in the resource manual.
Joint Technical Assistance, Training, and Planning	
Joint Grant Applications	This is where transit providers in the area agree that they will submit a single grant to the state and/or FTA for transit funding for their capital and operational needs.
Joint Training Programs	Joint training programs between agencies, in everything from preventative maintenance to safe wheelchair tie-down procedures, can lead to more highly skilled employees. Joint training can lead to reduced training costs with agencies that each possess a specialized trainer who can be responsible for one or more disciplines. For example: one agency could provide Passenger Assistance Training, one agency could specialize in preventative maintenance training, etc. Agencies can also purchase special training from reputable organizations and allow other agencies to attend.
Joint Planning and Decision Making	This involves agencies working cooperatively with either other similar agencies or a local provider in order to make known the needs of their clients and become involved in the local planning of services. For example, several local human service agencies may meet with local transit planners in an area to develop operations plans which attempt to meet the needs of the agencies' clients.
Sharing Expertise	Similar to sharing training resources, agencies can share their expertise in such things as grant writing skills, computer skills, and general assistance in operations of transportation services (such as tips for dispatching or accounting procedures). Sharing expertise may be something as general as a list of personnel across the area who have some expertise in a particular field which may benefit another agency. A "yellow pages" of the subject matter expert made available to each agency may be helpful in operating transportation service.
Coordinating Council	A coordinating council is made up of myriad agencies and partners with a common goal of coordinating transportation resources. This group differs from a coalition in that it is primarily made up of agencies which have a need for service and other groups (such as local municipalities) specifically formed to accomplish a strategic goal (such as to implement a new service). The coordinating council acts similar to a Transportation Advisory Committee in either a local or regional area.
Vehicle and Vehicle-Related Concepts	
Shared Vehicle Storage and Maintenance Facilities	Agencies share indoor storage space and, if available, maintenance facilities. Shared storage, especially if and when vehicles are stored outside, can aid in reducing engine wear during cold weather startup. Obviously, if a provider is conducting its own maintenance on vehicles, they can likely share maintenance costs with another local provider.
Joint Procurement of Vehicles, Insurance, Maintenance, Hardware/Parts, and Software	Joint procurement, or bulk purchases, is a cost-effective approach to increase purchasing power. Joint maintenance and fuel purchase is being more widely used across the country, especially given the rising costs of parts and fuel. Shared maintenance can be done quite easily between agencies in a given locale. Many times, human service providers and other local providers contract out maintenance to a local vendor. While there may be very few qualified maintenance professionals, it may allow a competitive process between agencies to do fleet maintenance between multiple agencies. Insurance pooling is likely the most difficult joint procurement possibility.
Provide Vehicles	This strategy involves an agency providing a used vehicle, either one that is being replaced or retired, to another agency. This can be done either through a transfer of title, donation for a small price (in the case of a retired vehicle), or sale to a local agency in desperate need of a replacement vehicle.
Vehicle Sharing	This level of coordination requires that agencies own and operate vehicles. Memoranda of Understanding or Joint Agreements are needed for this element to work properly. Agencies that operate vehicles are able to share those vehicles with other agencies in a variety of circumstances, such as when one agency has a vehicle mechanical breakdown, when vehicles aren't in use by one agency, or when capacity for a specific trip is not available.
Service Concepts	
Contracts for Service	This is contracting with another human service agency or a public provider to provide needed trips. This can be done occasionally on an as-needed basis or as part of scheduled service. One example is a local Head Start contracting for service with a local public provider. This contract revenue can then be used as local match for the local public provider, using the same drivers and vehicles as used previously.
Joint Dispatching and Scheduling	A single office would oversee the dispatching of vehicles and the scheduling of reservations for all of the participating transportation entities in order to provide transportation service within a geographic area.
Brokerage	A third-party agency would be set up as a transportation broker to interface between the transportation providers and users. The transportation broker would centralize the dispatching, recordkeeping, and sometimes vehicle maintenance.
Consolidated Service	A consolidated transportation program occurs when all transit services are provided by a single agency. This includes the vehicles, facilities, administration functions, maintenance, and operations.

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Table VI-2 shows qualitative measures of effort (input) and results (outputs) for each of the coordination activities. Effort includes the ease and cost of implementation. Results include both the dimensions of usefulness to current riders as well as the ability to attract additional riders.

**Table VI-2
Comparison of Strategies**

Strategy	Benefit to Users	Ease of Implementation	Implementation Cost	Operating Cost	Productivity Improvements	Cost Savings
Inclusive Brochures	◩	●	\$	\$	○	○
Common Brochures	◩	●	\$	\$	○	○
Information Phone Line - Call Center	●	◩	\$\$	\$\$	○	○
Website	◩	◩	\$\$	\$	○	○
Resource Manual	●	●	\$\$	\$\$	○	○
Joint Grant Applications	○	●	\$	\$	○	◩
Sharing Expertise	○	●	\$	\$	◩	◩
Coordinating Council	○	●	\$	\$	○	○
Joint Procurement	○	◩	\$	\$	○	◩
Vehicle Sharing	◩	○	\$	\$	◩	◩
Contracts for Service	◩	◩	\$	\$	◩	◩
Joint Dispatching and Scheduling	●	○	\$\$	\$\$\$	●	●
Brokerage	●	○	\$\$	\$\$	●	●
Consolidated Service	●	○	\$\$\$	\$	●	●
Legend:	○	Lowest		\$	Lowest Cost	
	◩	Moderate		\$\$	Moderate Cost	
	●	Greatest		\$\$	Highest Cost	

JOINT PUBLIC RELATIONS AND MARKETING

Inclusive Brochures

In its most basic form, a joint public relations effort and shared marketing materials would consist of the inclusion of essential information for services on one another's brochures. For example, each agency could include contact and service information for other local human service providers on its schedules, including the local taxi companies. This sort of coordination can be accomplished generally cost-free, since it is limited to agencies already printing service brochures. There is no need for any management or oversight of this effort, and agencies would have the freedom to choose which agencies with which to coordinate.

Benefits

- Increases the visibility of each organization in the brochure.
- Enables customers another means of finding the service they need.
- Educates customers to be better consumers.

Implementation Steps

- Obtain permission to use another agency's logo and contact information.
- Include the logo and contact information in your agency's next brochure.
- Print and distribute the revised brochure.

Common Brochures

A more involved option is to create a single brochure describing the different services available in the region. This common marketing material would distill the information of each provider into a brochure designed for broad distribution to potential users. Additionally, a common brochure may pave the way for other marketing opportunities.

The creation of a common brochure will require making numerous decisions about what information will be included and how it will be presented. Many transportation providers spend considerable time and resources in cultivating individual,

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agency-specific marketing strategies. It may be difficult to get multiple agencies with unique identities to agree on common marketing materials.

An agency, or a small number of staff from different agencies, would need to take responsibility for the work of producing the brochure. Staff from one of the larger transportation providers may be most suitable for undertaking such a task since they likely have greater experience with marketing. Additional meetings of agency representatives may be required to reach an agreement on the general purpose and design of the brochure.

The cost of a common brochure is variable based on decisions about the quality of printing and level of distribution. Since this brochure would be created for the express purpose of marketing regional transportation services to potential riders, it should have high quality printing. The design of a common brochure would require more time than adding additional information to individual brochures. The cost of a common brochure distributed over all participating agencies would reduce the individual cost for each agency.

A Resource Manual is a variation on the concept of the common brochure. A Resource Manual would differ in the amount of detail, the intended audience, and the use/storage. Normally a Resource Manual is the most comprehensive of the joint publications and would include very detailed information for each agency including operating hours, operating rules/schedules/routes/reservation systems (as appropriate), and possibly a brief listing of contact staff at each organization. In terms of the audience, it would be intended primarily for customers, but also serve as a staff-to-staff reference. Finally, it is usually printed in an 8.5 x 11 inch or similar format and is often used only as a desk reference, as opposed to the brochures which are pocket-sized.

Benefits

- Increases the visibility of each organization in the brochure.
- Enables customers another means of finding the service they need.
- Educates customers to be better consumers.

- Provides more information about each organization than an Inclusive Brochure.

Implementation Steps

- Agree which agency will lead the creation of the common brochure, and what roles each agency will fulfill in the creation of the common brochure.
- Draft the common brochure based on information provided by each agency.
- Allow review of the draft brochure by all participating agencies.
- Finalize the brochure for printing based on review comments.
- Print the brochure, distribute copies among agencies.
- Each agency then distributes the brochure to their customers.

Website

Once a common brochure, or a more comprehensive resource manual, has been created, it will be possible to create a common website to post this information. A website can serve both as a marketing tool and as a warehouse of information for potential riders. The design of the site should reflect the theme of the common brochure, and it could also provide access to all of the information available in a resource manual.

Benefits

- Increases the visibility of each organization on the website.
- Enables customers another means of finding the service they need.
- Educates customers to be better consumers.
- Provides more information about each organization than if separate sites.

Implementation Steps

- Agree which agency will lead the creation of the website, and what roles each agency will fulfill in its creation.
- Draft the content for the website based on information provided by each agency.
- Allow review of the draft website by all participating agencies.
- Finalize the website based on review comments.
- Make the website available on a “beta” basis to customers and make limited efforts to put out notices about its availability.
- Debug as needed for a month or two, then increase awareness further.

JOINT TECHNICAL ASSISTANCE, TRAINING, AND PLANNING

Driver Recruiting, Screening, and Training

Joint training programs between agencies—in everything from preventative maintenance to safe wheelchair tiedown procedures—can lead to more highly skilled employees. Joint training can also lead to reduced training costs with agencies that each possess a specialized trainer who can be responsible for one or more disciplines. For example, one agency could provide Passenger Assistance Training (PATs), one agency could specialize in preventative maintenance training, etc. The agencies could also purchase special training from reputable organizations / companies and allow other agencies' employees to attend. Training costs should be shared among the agencies.

Benefits

- Each agency's training budget will be reduced.
- The drivers and staff have more opportunities to learn from each other.

Implementation Steps

- The training needs of each agency's staff should be identified.
- The training courses that meet the greatest needs should be determined.
- The agency, organization, or company that could provide the needed training should be identified.
- State and federal grants that could assist in paying for the training should be determined.

Joint Planning and Decision Making

Joint planning and decision making involves agencies working cooperatively with either other similar agencies or a local provider to make known the needs of their clients and become involved in the local planning of services. For example, CARTS, the Qutecek Tribe, or the City could meet with other transportation providers in the area to develop operations plans that attempt to meet the needs of the other agencies' clients, while also extending the effectiveness of their own service(s).

Benefits

- The need for expensive planning documents for each transit agency will be reduced.
- More complex coordination in capital development and operational functions will be allowed.
- The duplication of services among the coordinating agencies will be reduced.

Implementation Steps

- The agencies should meet with local or borough transportation planners to develop a scope of work for the planning process.
- The scope of work should identify the goals and objectives.
- A time line should be developed for the completion of the planning document.
- The planning document should develop recommendations for making decisions about the operation of services, capital, funding, coordination process, and administration functions.

Coordinating Council

A coordinating council is made up of the various local agencies and partners with a common goal of coordinating transportation resources. This group differs from a coalition in the fact that a coordinating council is primarily made up of agencies which have a need for service and other groups (such as local municipalities) specifically formed to accomplish a strategic goal (such as to implement a new service). A coalition is typically more of an advocacy organization and may not include those who are responsible for implementation.

Benefits

- Allows for greater input from the key transportation agencies in the area.
- Allows members to share information and knowledge on a one-on-one basis.
- Provides greater opportunity to identify possible coordination actions.
- Increases the integration of transit planning within the region.

Implementation Steps

- Agencies interested in being members of the council need to meet and develop by-laws for the council.
- Council members need to elect a Chair and Vice-Chair.

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- Council members need to develop a mission statement, vision, goals, and objectives.
- Council members need to set a date for the monthly or quarterly meeting.

VEHICLE AND VEHICLE-RELATED COORDINATION

Joint Procurement of Vehicles, Maintenance, and/or Parts

Joint procurement (or bulk purchase) is a cost-effective approach to increasing purchasing power. Joint maintenance and fuel purchase is being more widely used across the country, especially given the rising costs of parts and fuel. Shared maintenance can be done quite easily between agencies in a given locale. Insurance pooling is likely the most difficult joint procurement possibility.

Benefits

- Individual agency capital outlay will be reduced.
- An economy of scale in purchases will be created, thereby reducing the overall operational cost per agency.
- With a decrease in capital and maintenance costs, an agency may be able to shift funding from maintenance and capital to service hours, thereby increasing the level of service or operations of the transit system within the region.

Implementation Steps

- The agencies need to meet in order to develop a basic understanding of how the procurement process will work.
- Memoranda of Understanding (MOUs) should be developed and agreed upon.

Provide Vehicles

An agency could provide a used vehicle, one that is either being replaced or retired, to another agency. This could be done either through a transfer of title, donation for a small price (in the case of a retired vehicle), or sale to a local agency in desperate need of a replacement vehicle.

Benefits

- The capital outlay for the agency that obtains the used vehicle will be reduced.
- The need to retire older vehicles in the fleet will be reduced.

- Human service transportation providers will be allowed to obtain vehicles that they would otherwise not be able to purchase, due to the cost of a new vehicle and the level of federal capital funding they are able to receive.

Implementation Steps

- The agencies should meet to determine the procedures for transferring a vehicle from one agency to another, as well as the level of overall need for vehicles.
- The agencies that receive federally funded vehicles should review their fleet and determine which vehicles can be transferred to other agencies.
- The agencies that wish to receive vehicles should review their fleet needs.

Vehicle Sharing

Vehicle sharing requires that agencies own and operate vehicles. Memoranda of Understanding or Joint Agreements are needed for this strategy to work properly. The agencies that operate vehicles are able to share those vehicles with other agencies in a variety of circumstances, such as when an agency vehicle has a mechanical breakdown or when capacity for a specific trip is at its maximum.

Benefits

- The overall local capital outlay will be reduced.
- These funds could be shifted to cover operational costs or increase the level of service, depending on funding sources.
- These funds could also be used for capital funding for facilities, equipment, and other capital assets.

Implementation Steps

- Agencies need to work closely together to develop MOUs and agreements on vehicle usage.
- Develop procedures, forms, and related materials to accommodate vehicle reservations, track mileage and use, assign refueling responsibilities, establish cleanliness standards/expectations, and specify incident/accident reporting requirements.

SERVICE COORDINATION

Contracts for Service

An agency/entity could contract with another agency/entity or another human service agency to provide needed trips. This could be done occasionally on an as-needed basis or as part of scheduled service. CARTS has contracted with several agencies in the Central Peninsula area. Other providers in the Central Peninsula area have also expressed willingness to offer contracted services with specific elderly and/or disabled client bases. In the Southern Peninsula, the purchase-of-service (voucher) program is a contract with a private taxi company.

Benefits

- The amount of local match that can be used to pull additional state and federal funding for transit services into the region will be increased.
- The duplication of services in the region will be reduced, thereby creating an economy of scale and improving the overall transit performance level.

Implementation Steps

- The agencies should meet to identify the needs and capacities of the contract parties.
- A contract should be developed detailing the responsibility of each party.