



## SECTION 13

# IMPLEMENTATION SCHEDULES



## **IMPLEMENTATION**

### **ROLES AND RESPONSIBILITIES**

Exhibit 13.1 defines the major roles and responsibilities of three major participants in the implementation of the proposed improvement program for senior transportation in Cuyahoga County. These participants include:

- ◆ Local agencies that currently provide transportation services to seniors who, under the proposed plan, will enter into purchase of service agreements with the respective Designated Service Providers (DSPs).
- ◆ The newly established nonprofit organization (the Senior Transportation Organization (STO)) that will coordinate services throughout the County.
- ◆ Designated Service Providers that will deliver service under contract to the STO.

The responsibilities of the respective organizations will require greater refinement as the parties move to the implementation stage.

### **SCHEDULE**

Exhibit 13.2 graphically defines the schedule for major implementation activities during the first twelve (12) months following completion of the Strategic Plan.

Exhibit 13.3 defines implementation over the remainder of the ten-year planning horizon, including other short-range, intermediate-range, and long-range activities. Based on decisions made the Senior Transportation Working Group, it was determined that an accelerated implementation schedule should be followed. In the proposed plan, virtually all activities are programmed to occur within the short- and intermediate time periods.

### **Roles and Responsibilities**

### **Schedule**

**Exhibit 13.1**  
**Roles and Responsibilities – Senior Transportation Organization, Designated Service Providers (DSP), and Agencies Participating in the Senior Transportation Program**

<b>Topic</b>	<b>Roles or Responsibilities</b>		
	<b>Agencies and/or Consumers</b>	<b>Senior Transportation Organization</b>	<b>Designated Service Providers</b>
Determination of Provider(s) in Five (5) Community Transportation Service Areas (CTAs)	Participate in regional meetings to select DSP(s) in the respective regions	Participate with local jurisdictions and participating agencies in the selection of DSPs	None
Contracting with Designated Service Providers (DSPs)	None	Develop contract agreement with selected DSPs detailing the terms of service and rate of payment of paratransit services	Operate fleet of paratransit vehicles with trained drivers in accordance with STO/DSP agreement
Coordination of Vehicle Fleets	Identify vehicles for operation by DSP; enter into lease agreement with DSP	Develop model lease agreement for use by DSPs	Enter into vehicle lease agreements with owning agencies
	Enter into a purchase of service agreement with the STO for client/passenger transportation services		
	Permit inspections of all vehicles for determination of whether vehicle will be included in coordination service delivery	Maintain customer database information on addresses, emergency contacts, program sponsors, trip histories	Maintain minimum levels of liability coverage and replacement value collision insurance (STO owned vehicles only) in accordance with STO/DSP agreement
	Enter into lease agreements with the DSP permitting coordinated use of rolling stock by the DSP (\$1.00 per year arrangement)	Establish minimum service policies (e.g., advance reservation period, trip cancellation procedures, etc.) for all DSPs	Maintain leased vehicles in accordance with STO preventive maintenance schedules during the term of the lease
	Serve as distribution outlet for consumer/client education materials	Maintain excess liability insurance coverage (if necessary to ensure adequate coverage beyond that held by DSPs)	Indemnify and hold harmless owning agencies from claims arising from DSP operation of leased vehicles
	Provide customer/client database information adhering to STO confidentiality policies	Field all incoming consumer requests for transit information	Electronically receive trip orders
	Provide on-going feedback to the STO on service issue/potential service	Develop minimum driver qualification standards to be used by all DSPs	Develop schedules for next-day service delivery (this will be done at

	improvements		the DSP level on an interim basis until the STO obtains scheduling software)
	Communicate new client registration/intake data to the STO on advance basis to the STO prior to service	Develop vehicle preventive maintenance schedules to be followed by DSPs	Operate daily schedules with some two-way communication capacity between dispatch and drivers/vehicles
	Communicate subscription changes, cancellations, temporary suspensions to the STO on a timely basis	Develop driver professional development training curriculum	Maintain driver logs recording requiring information necessary pursuant to STO/DSP agreement (e.g., time of pick-up, odometer reading, etc.)
	Process in a timely fashion requests for payment for transit services rendered submitted by the STO based on rate schedule in the purchase of service agreement	Conduct countywide driver training classes	Development of periodic operations reports (on a frequency determined by the STO) providing detailed and summary service statistics (designed to meet funding source and in-house performance evaluation requirements)
	Provide timely notice to the STO when new programs/services are initiated and/or terminated that impact client transportation	Establish fare/membership fee policies	Report trip cancellations to the STO call-center
		Collect customer membership fees from mail-in submission and other points of sale	Collect and tabulate passenger fares
		Refer incoming customers information requests or inquiries to fixed route, circulator, or rail service, where appropriate	Serve as a collection point for customer membership fees
		Book and confirm all senior paratransit trip requests	Maintain project revenues in secure fashion
		Compile daily trip orders in on a next day basis in chronological order for appropriate DSP	Assist the STO in investigation and resolution of passenger complaints
		Transmit daily trip orders by 3:00 PM (or other agreed time) to the DSPs	Assist the STO in the conduct of accident investigations
		Communicate trip cancellations on a real-time basis to DSPs	When necessary, comply with Federal regulatory requirements such as CDL and drug/alcohol testing regulations

		Coordinate with GCRTA ADA services for cross-regional senior paratransit travel	
		Conduct periodic quality assurance reviews of DSP operations	

**Exhibit 13.2  
Implementation Timeline - Short-Range Actions**

Action or Task	Responsible Party	2003						2004						
		July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	
<b>Plan Adoption and Public Participation</b>														
Acceptance of the Project Report by STWG	STWG	█												
Conduct of Five (5) Regional Meetings to Publicize Plan	CCPC/STWG		█	█	█									
Develop information brochure for aging network/stakeholders	CCPC/STWG		█	█	█	█	█							
<b>Nonprofit Corporation Formation</b>														
Draft by-laws and articles of incorporation	CCPC/STWG/Legal Counsel	█	█											
Finalize plans for governance board representation	CCPC/STWG/Legal Counsel	█	█											
Solicit board nominations from respective communities of interest	CCPC/STWG	█	█											
Convene meeting of new nonprofit board	STO BoD			█										
Adopt by laws and articles of incorporation	STO BoD				█									
Submit incorporation papers to State of Ohio	Legal Counsel					█								
<b>GCRTA/New Organizational Relationships</b>														
Execute memorandum of understanding	Stakeholders			█	█									
Execute memorandum between STO/GCRTA	BoD/GCRTA					█								
<b>Regional Organization of Providers</b>														
Evaluate and select designated service provider(s)(DSP) - Region 4	CCPC/Reg. Advisory Council						█	█	█	█				
PNP execution of contracts with DSP(s) - Region 4	STO BoD/Executive Director									█	█	█		
<b>Hiring of Executive Director</b>														
Develop job description and salary range	STO BoD/GCRTA			█										
Establish benefits	STO BoD/GCRTA				█	█	█							
Advertise position & accept applications	STOBoD				█	█								
Review applications and short-list candidates	STO BoD						█							
Conduct interviews	STO BoD							█						
Offer and acceptance	STO BoD								█					
Finalize office space with GCRTA	STO BoD/GCRTA								█	█				
Acquire office furniture for executive director	STO BoD/GCRTA								█	█				
Acquire office computers/software for management staff	STO BoD/GCRTA								█	█				
Initiation of executive director employment	STO Executive Director									█	█	█	█	█
<b>Other STO Administrative Development Issues</b>														
Establish bank accounts	STO Executive Director/GCRTA									█	█			
Establish agency accounting structure	STO Executive Director/GCRTA									█	█			
Establish payroll procedures	STO Executive Director/GCRTA									█	█			
Establish purchase order procedures with GCRTA	STO Executive Director/GCRTA									█	█			

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Implementation Timeline - Short-Range Actions**

Action or Task	Responsible Party	2003						2004					
		July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
<b>Scheduling and Customer Information Software Acquisition</b>													
Determine senior database, client info, reporting requirements	CCPC/AoA		█	█									
Appoint interim liaison to GCRTA software procurement committee	STO BoD		█	█	█								
Software specifications/procurement	GCRTA				█	█	█	█	█	█	█	█	█
<b>Hiring of Other Management Staff</b>													
Develop job description and pay scales	Executive Director/GCRTA							█	█				
Hire other management staff	Executive Director/GCRTA									█	█		
Start date for management staff	STO											█	█
<b>Pre-Implementation Planning - First Service Region</b>													
Develop transit information database	GCRTA/Executive Director							█	█	█	█	█	█
Finalize membership fees and fare policy	STO							█	█				
Establish telephone infrastructure	STO Executive Director/GCRTA										█	█	█
Develop and distribute customer information brochure	STO									█	█	█	█
Establish client database(s) for Region 4 customers	STO											█	█
Develop standardized maintenance procedure	STO											█	█
Develop standardized driver qualifications/training program	STO											█	█
Develop and finalize interim, manual or semi-automated trip reservation procedures	STO											█	█
Hire and train customer service agents	Executive Director/GCRTA											█	█

**Abbreviations:**

- STWG: Senior Transportation Working Group
- CCPC: Cuyahoga County Planning Commission
- STO: Senior Transportation Organization, a new nonprofit organization formed to manage and administer regional coordination initiatives.
- GCRTA: Greater Cleveland Regional Transportation Authority
- DSP: Designated service provider(s) in five community transportation areas.
- AoA: Western Reserve Area Agency on Aging

Source: RLS & Associates, Inc., May 2003.

**Exhibit 13.3  
Implementation Timeline - Intermediate- and Long-Range Actions**

Action or Task	Responsible Party	2005	2006	2007	2008	2009	2010	2011	2012	2013	
<b>Regional Organization of Providers</b>											
Establish regional advisory provider council - Region 1	CCPC/STO BoD	■									
Evaluate and select designated service provider(s)(DSP) - Region 1	CCPC/Reg. Advisory Council	■	■								
PNP execution of contracts with DSP(s) - Region 1	STO BoD/Executive Director		■								
Region 5 negotiation with GCRTA to be DSP	City of Cleveland/STO/GCRTA	■									
PNP execution of contracts with DSP(s) - Region 5	STO BoD/Executive Director		■								
Establish regional advisory provider council - Region 2	STO BoD/Executive Director		■								
Evaluate and select designated service provider(s)(DSP) - Region 2	City of Cleveland/STO/GCRTA		■	■							
PNP execution of contracts with DSP(s) - Region 2	STO BoD/Executive Director			■							
Establish regional advisory provider council - Region 3	STO BoD/Executive Director		■								
Evaluate and select designated service provider(s)(DSP) - Region 3	City of Cleveland/STO/GCRTA		■	■							
PNP execution of contracts with DSP(s) - Region 3	STO BoD/Executive Director			■							
<b>Regional Operation</b>											
Commence operation in Region 4	Designated Service Provider(s)	■						Continued Operationd Based on Study Outcome			
Commence operation in Region 1	Designated Service Provider(s)		■						Continued Operationd Based on Study Outcome		
Commence operation in Region 5	Designated Service Provider(s)		■						Continued Operationd Based on Study Outcome		
Commence operation in Region 2	Designated Service Provider(s)			■						Continued Operationd Based on Study Outcome	
Commence operation in Region 3	Designated Service Provider(s)			■						Continued Operationd Based on Study Outcome	
<b>Long Range Actions</b>											
Conduct of study to determine further consolidation of regions and/or consolidation of senior and ADA services	Consultant					■					

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