



# Kansas Transit Dispatcher Manual 2018



The Rural Transit Assistance Program (RTAP)  
Improves the mobility of rural Kansans  
through training and technical assistance

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# KANSAS TRANSIT DISPATCHER MANUAL

## WELCOME TO TRANSIT DISPATCHING

Dispatchers play a vital role in a transit organization. A dispatcher is the central communication hub of a transit agency — reaching current and future customers, drivers, maintenance staff, management and other colleagues. Being a dispatcher requires many skills, and often a lot of those skills are learned on the job. Because of this, it is essential that dispatchers receive ongoing training and are encouraged to self-reflect as they gain experience in their position, in order to continually improve.

This manual is an on-boarding training manual for individuals beginning a career as a transit dispatcher without any prior experience in the position. It is also beneficial as an on-the-job reference guide for dispatchers and managers of all experience levels.

## MANUAL DEVELOPMENT PROCESS

The manual was developed by the University of Kansas Transportation Center, Rural Transit Assistance Program (RTAP), with funding from the Kansas Department of Transportation. Portions of this manual are modified, with permission, from the National RTAP Scheduling and Dispatching Training Package for Rural Transit Systems. Kansas RTAP worked with an Advisory Committee of transit providers from Kansas, had a focus group of transit providers and conducted an online survey of Kansas transit providers to develop content that was optimized for the Kansas audience.

## AUDIENCE FOR THE MANUAL

The intended audience for this manual includes transit dispatchers, schedulers, supervisors and human resource staff.

## ORGANIZATION OF THE MANUAL

This manual is made up of two main sections: the main body and supplementary materials. In the main body of the manual, you will find different sections called **Modules**. These modules focus on different topics that are common to the job of a dispatcher with subsections underneath each module. You will find that there are terms that are new to you, as the transportation industry has many specific concepts. These terms will be introduced either in the body of the document, in call-out boxes, or in the glossary at the end of the manual.

The Supplementary Materials make up the back of the manual and provide support to the modules. In this section you will find the following information:

- **Scripts:** sample scripts are provided for numerous types of interactions that you may have as a dispatcher
- **Forms:** sample forms are provided for collecting information on client interactions
- **Activities:** each module has an associated activity so that new and continuing dispatchers can practice their craft.
- **Glossary:** definitions of key terms are provided

## FEEDBACK

Kansas RTAP hopes this manual is helpful in training new and continuing dispatchers. We welcome feedback on ideas, additions or corrections. Contact Lisa Koch at [kolisach@ku.edu](mailto:kolisach@ku.edu).

If there is interest in having training, dialogues, or regular peer-to-peer networking among dispatchers, Kansas RTAP is available to facilitate.

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# KANSAS TRANSIT DISPATCHER MANUAL

## MODULE 1: DISPATCHER AND SCHEDULER RESPONSIBILITIES

*This section was modified with permission from the National RTAP Scheduling and Dispatching Training Package for Rural Transit Systems. We added original material based on feedback from transit providers in Kansas.*

### OVERVIEW

The primary role of a *dispatcher* is to keep the transit system moving and provide the communication link between customers, drivers and other agency staff. The primary role of a *scheduler* is to work closely with the dispatcher to create schedules that accommodate changing customer demands. These two roles can be accomplished by the same individual in small organizations but are often accomplished by separate staff in larger transit agencies.

### TOOLS OF THE TRADE

Your job as a dispatcher and/or scheduler requires you to multitask. Your workstation must be set up to allow easy access to the tools you need. Most importantly, you will need a computer. This will allow you to easily access online mapping (such as Google Maps) so that you can find the most optimal routes for your vehicles. If your agency has scheduling software, your computer will be your tool for scheduling trips. You may also use your computer as the database for your passenger records. Because your computer has a variety of uses, having two screens may be required at your workstation.

As the dispatcher, passengers will be calling you to seek rides. Your phone needs to be easily accessible. Having a headset will make your hands free to type or write important details about the trip or the passenger. It will also free up room at your workstation.

As the first point of communication with passengers, it will be up to you to be knowledgeable about agency policies and procedures. Having these manuals at your workstation will be essential. It is also recommended to have key pages or passages taped or pinned up for easy reference when you are on the phone. You may also want your service hours, fares, service area and essential phone numbers in an easy location for reference.

### BENEFITS OF DISPATCHING/SCHEDULING

- Your customers get their trip requests fulfilled in a timely manner
- You use vehicle capacity to cost-effectively get customers to and from their destination
- Your customer information is accurate by updating the status of a customer's trip so drivers can locate customers and take them to the right destination
- Drivers are able to focus on their primary duties

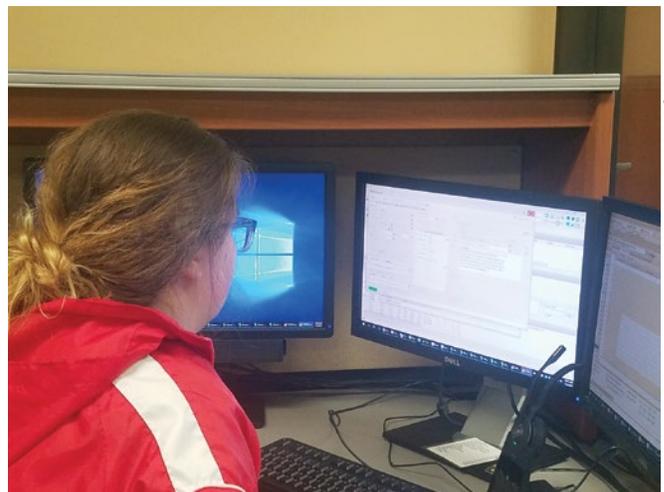


Photo courtesy Flint Hills ATA

### YOUR ROLE AS A DISPATCHER

#### KEY DISPATCHING RESPONSIBILITIES

As a dispatcher, your responsibilities cover all aspects of transit service. Dispatchers must maintain awareness of the location of their vehicles and where they need to be sent. Dispatchers are the central contact for drivers, customers, internal agency staff, and the community. Additionally, dispatchers are responsible for tracking data and reports. Your responsibilities can be grouped into the three following categories:

- System Coordination
- Communications
- Recordkeeping

## System Coordination

As the system coordinator, dispatchers must prioritize transporting their customers in a safe and efficient manner. Maintaining positive relationships with agency staff and customers makes this task easier.

- **Route Monitoring:** Dispatchers monitor the entire system and each individual run by keeping track of vehicle locations and maximum capacity of the vehicles. Dispatchers also actively monitor on-time performance, and adjust vehicle wait times and schedules to keep vehicles on schedule as much as possible.
- **Customer Coordination:** Dispatchers ensure that each customer is picked up as close as possible to the promised pick-up time while trying to minimize the number of miles (and hours) each driver travels. Dispatchers make quick decisions about schedule changes and re-routing when trip conditions change. Dispatchers analyze whether additional trips can be added to a run.

### WHAT IS A RUN?

A transit run is the schedule of a driver's pick-ups and drop-offs for the day, generally on one vehicle over a shift. A scheduler develops runs for each of the drivers operating in an agency each day.

### Agency Coordination:

As the dispatcher, you coordinate with the maintenance department on issues involving the status of agency vehicles such as if they are available for use or not. You also coordinate and/or initiate responses to incidents that occur on or around agency vehicles and facilities such as crashes, weather events, health emergencies on the vehicle, or crime. Lastly, if you receive an out of area trip request, use the Kansas RTAP website ([kutc.ku.edu/map](http://kutc.ku.edu/map)) to coordinate with other transit providers. If you receive an out of area request, visit the RTAP website click on the portion of the map where the ride is needed or on the County link and you will find the available transit providers in the area. Contact the provider and see if they are available to provide the ride. If necessary, negotiate a drop off with them from your service. Communicate with your passenger so that they understand which agency will be transporting them and how much the entire trip will cost (and at which portions of the trip they will be paying a fare).

### HOW TO USE THE KANSAS RTAP PROVIDER MAP?

The Kansas RTAP Provider Map gives users contact information, service area, hours, fares and eligibility for all the KDOT funded transit agencies in Kansas. It is a great resource for connecting riders with trips outside of your service area. The website is [kutc.ku.edu/map](http://kutc.ku.edu/map).



Photo courtesy Flint Hills ATA

## Communications

### Communication with Drivers

While "location, location, location" is the catch phrase for real estate, "communication, communication, communication" could be the catch phrase for dispatchers. Drivers rely on you for any information they need during the day. Your responsibilities when communicating with drivers include:

- Dispatching trips may occur over the radio if a change to the daily schedule occurs
- Monitoring and updating vehicle locations and assisting with directions to destinations
- Providing information about changes in runs
- Confirming no-shows, trip refusals and cancellations
- Confirming and coordinating passenger information
- Dispatching maintenance staff and standby vehicles
- Providing support to a driver during an incident
- Advising drivers of traffic conditions, detours, and other vehicles' status

## WHAT DOES IT MEAN TO DISPATCH?

In demand response transit, dispatching is the process of assigning drivers and their vehicles to customers.

### Communication with Customers

You are also the communication link for customers. Your responsibilities when communicating with customers include:

- Advising customers of their trip status (estimated arrival time, subscription status, or other relevant information)
- Taking customer requests for rides over the telephone
- Providing customers with any available transportation service options
- Coordinating changes in service, for example: if service hours change, the dispatcher communicates that change to customers
- Coordinating transfers to another service area

### Recordkeeping

As a dispatcher, you have an important role in creating and keeping records of daily operations. Accurate and thorough documentation is essential. Your recordkeeping responsibilities may include:

- Maintaining radio and telephone logs
- Maintaining daily passenger logs
- Tracking no-shows, cancellations and trip changes through accurate documentation
- Maintaining vehicle fleet from drivers information such as mileage, inspection and preventative maintenance dates
- Preparing, updating, and distributing trip schedules and log sheets
- Recording incidents or emergencies

## WHAT IS AN INCIDENT?

An incident is an unexpected disruption in service. Module 6 will provide more information about managing incidents and emergencies.

### Use of Records

The information you record is essential for agency operations. The information you record is used for:

- Verifying what happens on a daily basis
- Documenting service complaints or disputes
- Planning service changes
- Billing customers or agencies
- Documenting incidents
- Obtaining insurance and processing claims

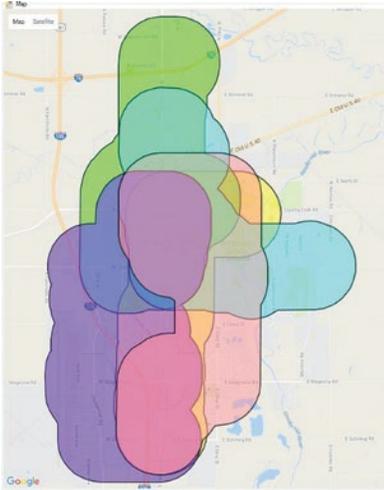
### Complete and Accurate Information

When you record information, whether it is for dispatching, when documenting an incident or complaint, or when describing a maintenance issue, complete and accurate information is critical. In particular, please note:

- Driver's name
- Agency vehicle number
- Accurate dates and times
- Correct spelling of customer names
- Details about the communication between you and the driver or the customer

Dispatching is a multi-faceted role and in order to do your job well, you need to consider many factors. These factors have a significant impact on the decisions you make and the challenges you may face. How you respond also can impact the overall system performance. The following factors have a significant impact on how you do your job and challenges you face:

- Operations
- Policies and Procedures
- Customers
- External Conditions



## OPERATIONS

### Service Area

The service area and hours set the limits of the operation. The service area represents the specific geographic location where agencies provide demand-response service. Your service area is determined by agency policy. You need to be familiar with the service area to decide if an

additional request can be accommodated based on the trip origin and destination. Also, you need to know if your agency will provide rides to specific points outside the service area or provide service to transfer points so the customer can receive a ride outside the service area via other agencies in Kansas. Your knowledge of the roads in the service area, or your ability to find the information quickly is critical when you are asked to assist drivers. Make sure you have access to maps for your service area, and make sure the maps are up-to-date and accurate. If your agency does not have dispatching/scheduling software that includes mapping tools, use online mapping, such as Google Maps, for accurate and up to date information. For up to date construction information, get updates from KDOT KanDrive, the website for travel information ([kandrive.org](http://kandrive.org)) and City and County public works departments will have information for their roads.

### Service Hours

The service hours define the time when trips can be scheduled. Service hours identify times for the first pick up and last drop off. It is important for you to know the regular operating hours, weekend and holiday operating hours, and the operating hours of your own agency and the transit agencies with which you coordinate.



### Service Specifications

Service specifications refer to the location where the customer is met by the driver.

- With curb-to-curb service, the customer is picked up and dropped off at the curb, the driveway, or at the main road. Riders with

disabilities may be unable to get to the curb. This method causes the least deviation from travel schedules.

- With door-to-door service, the customer is picked up and dropped off at the outside door. This is best suited for riders with mobility issues who cannot reach the curb without assistance. However, travel schedules will experience delays. This option has greater liability due to drivers assisting riders on private property.
- A variation of door-to-door is door-through-door service where the driver assists the customer inside the building. This option is not generally recommended due to the agency liability of having drivers inside the home of a passenger and its impacts related to on-time performance.

### Driver Information

Driver availability will determine how many routes can be scheduled. You need to have a clear understanding of how many drivers (full-time, part-time, or volunteer drivers) are available at any given time and which drivers are able to assist with mobility devices. Check agency policy (or if there is a union for drivers) whether there are contract rules that affect drivers. Policies may require that drivers be staffed by seniority or that they pick their own schedule. You will not be able to accommodate changes to the schedule if drivers are not available.

### WHAT IS A MOBILITY DEVICE?

A mobility device is an implement designed to assist walking or improve the mobility of people with a mobility impairment.

### Vehicle Information/Fleet Facts

You need to have a clear understanding of how many vehicles are available at any given time, the seating capacity for each vehicle, and how many mobility devices can be accommodated on each vehicle. You need to keep track of where the vehicles are during and after



operational hours, especially if a vehicle is sent home with a driver. Some agencies allow vehicles to be sent home with drivers if routes start closer to their homes than to the transit office (for example: if the agency serves a regional area and the driver provides service in one of the small towns that is several miles away from the regional center.) With this information, you will be able to send the right vehicle to the right place at the right time.

## **POLICIES AND PROCEDURES THAT INFLUENCE DISPATCHING**

The more you are familiar with your agency's policies and procedures, the easier it will be to make quick and informed decisions. Some policies are influenced by funding organizations such as the Federal Transit Administration or KDOT. Some are influenced locally by a City or County. If you have a question about a specific policy, ask your manager.

## **DRIVER RESPONSIBILITIES**

Drivers often require your assistance when they interact with customers so that they are consistent with agency policy in dealing with passenger issues. You will need to be familiar with your agency's policies and procedures for driver responsibilities. Examples are:

- How much assistance a driver can provide to a passenger
- Whether a driver is required to assist a customer on or off the vehicle, to the house or into the house
- If a driver is expected to carry or transport packages
- How the lift is used and its weight limitations
- How much is the cost to ride the bus
- When drivers are required to notify dispatch. Examples of this are drivers notifying the dispatcher every time they leave the vehicle, except if they are going to assist a passenger into the vehicle, when they have dropped off a passenger, or if there is a delay in picking up passengers
- How to accommodate oxygen or ambulatory assistive devices such as walkers, canes, or crutches.
- Whether a driver can stop for side trips; for example, to pick up a prescription
- How to accommodate for the health and welfare of the customer while in service

## **CUSTOMER FACTORS THAT INFLUENCE DISPATCHING**

When you are dispatching a vehicle, you'll need to know if there are special customer requirements that impact which vehicle to send. Considerations include the accommodation of mobility devices, service animals, and

car seats. Communication barriers with blind individuals should also be taken into account. Those who are blind will not be able to read schedules or policies on the internet and will rely on dispatchers for this information. Give them as much time as needed on the phone to answer all of their questions; you may be their only resource. The Kansas Relay Center facilitates telephone communication from Kansans with hearing and/or speech disabilities. The person communicates with a telecommunications device for the deaf (TDD) and this device allows the user to type out their portion of the conversation. In order to contact a rider needing to use The Kansas Relay Center, call 1 (800)766-3777 and the operator will originate the call with the person needing the service.

## **DISPATCHING INFLUENCE ON PERFORMANCE**

System coordination, communication, and understanding the factors that influence your decisions impact how the service performs. Your expertise contributes to an efficient on-time performance record. Informing drivers ahead of time of passengers who may need added support, such as a visually impaired rider, will provide a more comfortable ride for the passenger and a better atmosphere for the service. The driver will then know how to provide the appropriate service for the rider, without having to call the dispatcher during the trip (which can slow down the service for others).

## **EXTERNAL CONDITIONS**

Your skills will be put to the test when unforeseen circumstances occur. The system will slow down or stop altogether, and you will have to work hard to keep the system moving or get the customers home safely. When you can anticipate and prepare for this type of event, the effects of the disruption will be minimized. External factors include:

- Weather conditions
- Road construction, hazards, or traffic
- Vehicle breakdowns or crashes

## **YOUR ROLE AS A SCHEDULER**

Your role as a scheduler is to build runs as effectively and as efficiently as possible. To do that, you need to understand your agency's policies and procedures, interpret ride information, interact with customers to get the information you need, and interact with dispatchers after the schedule has been created. Your work balances the customer's need to get to their destination and the agency's need to maintain high productivity for cost-efficient and sustainable service.

## SCHEDULER RESPONSIBILITIES

Although your specific responsibilities as a scheduler will be determined by your agency, they may include:

- Entering and updating customer data
- Scheduling trips using paper and pencil, computer software, or an automated scheduling system
- Producing driver schedules and/or manifests
- Changing or canceling trips
- Resolving scheduling issues, service requests, and complaints
- Preparing data or reports when needed
- Working with service contractors, such as taxi cab companies or other transportation operators that provide transportation service when there is more demand than the agency can handle

### WHAT IS A MANIFEST?

The Manifest contains the essential information a driver needs to pick up and drop off customers on his or her route, including:

- A route number
- Route start and end times
- Vehicle assignment
- Driver assignment
- Customer pick up and drop off information, including:
  - **Name**
  - **Address**
  - **Phone number**
  - **Transport requirements**
- Time information such as estimated pick-up time, appointment time, and scheduled pickup time
- Fare required
- Other data required for agency record keeping and reporting

## THE SCHEDULING PROCESS

Scheduling can be compared to designing and completing a puzzle. The way each puzzle is designed and completed depends on each service type. The basic steps are:

- Gather the data to design the overall service
- Look at each trip separately. Where is its origin? Where is its destination? Are there other trips that can have origins and destinations that fit within that trip and within the same time?
- Put it back together again

It takes good problem solving skills, patience, and flexibility to make the pieces fit and to complete the picture. When all the pieces fit together, you have a smoothly running transit system that serves the customer's transportation needs.

## MODULE 2: SERVICE TYPES

*This section was modified with permission from the National RTAP Scheduling and Dispatching Training Package for Rural Transit Systems, includes original material and uses feedback from transit providers in Kansas.*

The type of service a transit system operates will dictate how the dispatcher takes calls and a scheduler designs runs. The following service types reflect the numerous types offered throughout Kansas.

### DEMAND-RESPONSE SERVICE

Demand-response services do not operate over a fixed route or on a fixed schedule, but are rather based on the needs of the riders on a given day. Demand-response service can be categorized into four types of operations:

- **Many origins: Many destinations** - This option allows for many options for origins and destinations  
(*Example: Picking up customers from their homes and dropping them off at their requested location.*)
- **Many origins: One destination** - This option allows for many options for origins, but limited options for destination.  
(*Example: Picking up customers at their homes and dropping them off at a workplace or shopping area.*)
- **One origin: Many destinations** - This option allows for limited options for origins, but many options for destinations  
(*Example: picking up customers from an adult day care location and taking them to their homes.*)
- **One origin: One destination** - This option allows for limited options for origins and destinations  
(*Example: Picking up customers from a specific stop and taking them to the airport.*)

### DEMAND-RESPONSE SERVICE DELIVERY OPTIONS

Rural transit agencies typically deliver different types of demand-response service. The main types are listed below.

#### Reservation Service

Reservation Service is demand-response service that requires passengers to call ahead and reserve a trip for a particular date and time in the future for every trip they make. Reservations are often made in advance, but some agencies allow same day requests.

#### Subscription Service

Subscription service is a shared-use transit service operating in response to on-going reservations made by passengers to the transit operator, who can schedule in

advance a consistent trip to pick up the passenger and transport him/her to his/her destination. (Example: if a rider has a consistent hair appointment each Friday at noon, that rider can create a subscription for that ride so that she doesn't have to make a reservation for each individual trip.)

### ADA Complementary Paratransit Service (in combination with Fixed Route Services)

ADA Complementary Paratransit Services must be origin-to destination or on-call demand-response service to an accessible fixed route where such service enables the individual to use the fixed route bus system for his or her trip.

The Americans with Disabilities Act (ADA) impacts how rides are scheduled for eligible complementary paratransit customers. Care should be taken to ensure that the ride complies with ADA's requirements and that a person's civil rights are not violated. Here is a quick summary of how the ADA requirements impact scheduling.

- ADA requires "next day" service, meaning that dispatch must be available to accept ride requests the day prior to any day the transit operation is in service
- Customer pick-up times can be negotiated up to one hour before or one hour after the requested pick-up time
- The service cannot have "capacity constraints" (in other words, a trip cannot be denied because of limited room on the service) Examples of capacity constraints are an excessive number of trip denials, late pickups, and long trips.
- Presumptive eligibility is provided to visitors to the service area
- ADA customers using wheelchairs are not required to transfer to a seat once in the vehicle

Information on ADA compliance will be discussed in further detail in Module 7.

### Taxicab Service

Taxicab Services are door-to-door exclusive and/or shared ride services under private ownership available by reservation or street hail to individuals and small groups traveling together. This service is often contracted by the public transit organization to fill in the gaps of service when public transit is not available.

### Vanpool Service

Vanpool Service is transit service operating as a ride sharing arrangement, providing transportation to a group of individuals traveling directly between their homes (or an agreed upon location) and a regular destination within the same geographical area. Vanpool(s) must also be open to the public and that availability must be made known.

## Carpool Service

Carpool service is an arrangement where two or more people share the use and cost of privately owned automobiles in traveling to and from pre-arranged destinations together. Carpools can be arranged by local transit agencies.

## Volunteer Drivers

Volunteer drivers are individuals who drive vehicles to transport passengers for the transit agency, but are not employees of the transit agency and are not compensated for their labor.

## DEMAND-RESPONSE SCHEDULING SKILLS

Your goal is to create an effective schedule that serves the customers and uses vehicles to their greatest capacity.

Preparing the schedule takes:

- Good problem solving and planning skills
- The ability to adapt to the demands of the moment

The two main tasks of demand-response scheduling are:

- Route planning
- Schedule writing

## Route Planning and Scheduling

Plan your route with these considerations in mind:

- Plan the overall route structure with efficient coverage
- Create runs that start at the farthest point, and try to avoid excessive doubling back (returning somewhere the vehicle has already been)
- Minimize customer ride time whenever possible
- Minimize the distance a route has to travel to handle a new trip:
  - If two trips are going to the same address at about the same time, they should be scheduled on one vehicle rather than sending two vehicles
  - If two routes have availability, select the route that is closer to its next trip
- Save blocks of free time or “slack” time for hard-to-place trips (such as trips to remote parts of the service area or trips that include individuals who need additional time to board or alight)

The primary goal of route planning is to assign a set of trips to a vehicle in a way that creates an efficient run. Route planning needs to consider many factors:

- Customer factors
- Timing factors

- Grants and contracts
- External factors

## Customer Factors that influence scheduling

The more you know about your customer, the easier it will be to schedule the trip.

## Customer Information

For every trip, you need to know who is getting picked up, what the origin address is, what time they need the trip, and where they are going. If the basic customer information is incomplete or incorrect, it will be difficult to prepare an accurate schedule. The service requirements of each customer will determine how a trip is scheduled. Find out if a customer requires the use and transport of a mobility device/aid, travels with medical support equipment (e.g., oxygen canisters), or requires the use of a booster or car seat. At times, a customer may travel with a personal care attendant (PCA), family member or service animal. Note in the customer profile if the customer requires extra time or special assistance to board/alight the vehicle. Another consideration will be if a customer is covered by a specific contract or sub-contract that does not allow mixing services. More information on contracts will be provided later in this section.

## WHAT SHOULD BE INCLUDED IN THE CUSTOMER PROFILE

- Name (with pronunciation) For example Maria Nuno (NOO-nyose)
- Address
- Phone number
- Do they have a mobility aid?
- Do they have medical support equipment?
- Do they require a booster or car seat?
- Will they be traveling with a Personal Care Attendant or family member?
- Will they be traveling with a service animal?
- Do they need extra time to board or alight?

### Trip Information

The type of trip your customer requests influences how it is scheduled. In general, the order in which trips are scheduled is:

- Subscription services
- ADA Complementary Paratransit
- Individual single requests. The origin and destination, especially for long trips will also influence how the request is scheduled.

Peak hour trips (from 7:00 am – 9:00 am and 4:00 pm to 6:00 pm) are more difficult to schedule. Your agency may have different service peaks, depending on your clientele. When possible, if a discretionary trip can be scheduled during non-peak hours, it is advisable to do so if the customer agrees. *However, for ADA Complementary Paratransit trips, requests must be accommodated within 60 minutes before or after the requested pick-up time.*

#### WHAT IS A DISCRETIONARY TRIP?

A discretionary trip is a trip for which a passenger does not have an appointment, such as shopping. These are generally the easiest to move around in the schedule. A passenger generally has an appointment set with their doctor or their hair stylist before scheduling their transit trip, therefore it is difficult to negotiate the pick-up and drop-off time with them.

### Cancellations

An advance cancellation is defined as a trip that is canceled 2 or more hours before a scheduled pick-up time. A late cancellation is defined as a trip cancelled 1 to 2 hours before the scheduled pick-up time. Policy on advance and late cancellations is determined by your agency.

### Scheduling Writing

Schedule writing is an art form. It takes practice to make a schedule that is both efficient and effective. When developing a schedule, schedule trips in this order:

- Subscription trips
- ADA complementary paratransit, if applicable
- Advance reservations
- Unscheduled trips

When capacity is reached, new routes can be added if there is vehicle and driver availability.

### Scheduling Window

As a ride is scheduled, it creates a scheduling window. A scheduling window consists of the pickup time, the pick-up window, the travel time, the drop-off window, and the drop off request. See the example below. The scheduling window helps determine capacity, or how many customers can be scheduled to each vehicle. A customer should be picked up or dropped off within your service policy window. Both local and federal policies dictate the scheduling window, depending on the type of service being offered. If the individual being served is receiving ADA complementary paratransit, federal policy dictates that there must be a defined pick-up window for the service. Your agency will have an ADA complementary paratransit policy that will describe this pick-up window. If the individual being served is receiving general demand-response transit, your local transit policy will describe the pick-up window.



### Timing Factors that Influence Scheduling

Timing factors are critical to a successful schedule.

- When a customer requests a trip, a pick-up time is offered by the dispatcher after he or she checks service availability. The customer then agrees to the time. It is sometimes referred to as the “negotiated pick up” time.
- The scheduler then sets the “negotiated pick up/drop off window,” which is the period of time around a requested pick up or drop off time that a trip may be scheduled and still be considered responsive.
- The scheduled pick-up time is recorded. This time may vary slightly from the agreed upon pick-up time if scheduling changes are made after the customer has placed a request.
- The on-time performance window defines the maximum change in time between the agreed upon and scheduled pick-up times that should be made without notification of the customer.
- The scheduler may decide to add time to the schedule when the vehicle is not in revenue service. This is referred to as slack time.

### Vehicle Timing Factors that Influence Scheduling

Timing factors are critical to a successful schedule, and include:

- Vehicle dwell time (time waiting for passengers)
- Travel time
- Travel speed
- Accurate arrival times

The following figure shows how scheduling is conducted in dispatching/scheduling software.

### Calculating Travel Time

Schedulers often must “invent” a travel time for a given route based on a predicted average speed. The formula for this is: distance in miles times 60 minutes, divided by the vehicle speed.

$$\frac{\text{DISTANCE IN MILES} \times 60 \text{ MINUTES}}{\text{VEHICLE SPEED}} = \text{TRAVEL TIME}$$

Experienced schedulers understand that drivers can make or break any schedule. That is why it is so important for the travel times to be reasonable to drive, and based on actual conditions on the street.

### Grants and Contracts Influence on Scheduling

Contracts and grants affect how rides are scheduled and how many trips are allowed. These are contracts with your agency to provide specific services to specific groups of people or individuals. As a dispatcher, you need to know the details of these agreements. These should be detailed in the passenger information for each rider who is part of the contract (as this is how their trip will be paid). In some cases, trips under a certain contract may not be able to be mixed with other trips. Examples of grants or contracts include:

- Temporary Aid to Needy Families (TANF)
- Medicare
- School transportation
- Medical transportation
- Human service agency transportation

### External Factors that Influence Scheduling

Most external factors can’t be avoided and can cause service disruptions. Schedules will need to be adjusted when external factors influence service availability or timing.

- Add extra travel time when weather delays are expected
- Monitor road closures or construction delays
- If possible, adjust service availability when vehicle breakdowns occur

### The Manifest

The end result of schedule-writing is a manifest, which contains the essential information a driver needs to pick up and drop off customers on his or her route. The manifest typically contains:

- A route number
- Route start and end times
- Vehicle assignment
- Driver assignment
- Customer pick up and drop off information, including:
  - Name
  - Address
  - Phone number
  - Transport requirements
- Time information such as estimated pick-up time, appointment time, and scheduled pickup time
- Fare required

Other data required for agency recordkeeping and reporting

## Schedule Evaluation

When an entire day's worth of manifests is completed, it needs to be evaluated to make certain it accomplishes all the trips as efficiently as possible. One goal of schedule optimization is to have the fewest number of routes to achieve the highest level of service possible, thereby increasing productivity. A schedule can be evaluated for performance indicators such as:

- Productivity
- Revenue hours
- Revenue hours as a percent of total hours
- Maximum ride time
- On-time performance

## FIXED ROUTE SERVICE

Fixed route schedules are developed less frequently, and have fewer service types than demand-response service. The fixed route service types that are more common in rural agencies are described in the following section.

Photo courtesy Flint Hills ATA



### FIXED ROUTE SERVICE DELIVERY OPTION

Some transit providers in Kansas offer fixed route services in more densely populated areas. There are different methods for providing fixed route services, which are outlined in the following section.

Fixed route services are those provided on a repetitive, fixed schedule basis along a specific route with vehicles stopping to pick up and deliver passengers to specific locations. Each fixed route trip serves the same origins and destinations.

### Fixed Route Service with Route Deviation

Route deviation service is different than fixed route bus service in that the bus may deviate from the route alignment to serve destinations within a prescribed

distance (e.g.,  $\frac{3}{4}$  mile) of the route.  $\frac{3}{4}$  mile is the typical route deviation because it allows the route deviation to be used as the required complementary paratransit for fixed route service, thereby having both the fixed route and the complementary paratransit in one service. Following an off route deviation, the bus must return to the point on the route it departed. Passengers may use the service in two ways:

- If they want to be taken off-route as part of a service deviation, they must tell the bus operator when boarding, or
- If they want to be picked up at an off-route location, they must call the transit system and request a pickup, and the dispatcher notifies the bus operator

### Fixed Route Service with Point Deviation

Point deviation service is a method of providing transit service to all origins and destinations within a corridor, defined by a prescribed distance from a street (e.g.,  $\frac{3}{4}$  mile), making scheduled stops at mandatory time points along the corridor on a predetermined schedule. This type of service does not follow a fixed route because the path is determined based on the origins and destinations of the passengers. Passengers can use the service in three ways:

- By traveling between mandatory time points on the schedule
- By advising the bus operator if they want to be taken to a destination that is not a scheduled time point when boarding, or
- If they want to be picked up at a location that is not a scheduled time point, by calling the transit system and requesting a pickup

### School Tripper Service

School tripper service is additional capacity that an agency adds to an existing public transit route to meet the demands of traveling students. The additional service must also be open to the general public to meet federal requirements.

### FIXED ROUTE PLANNING

To plan an effective and efficient fixed route system, planners must consider the needs and demands of the community along with the population using the service. The following section provides an overview of the key components of fixed route planning.

### Service Scheduling Information and Terminology

Before beginning the fixed route scheduling process, you will need to be familiar with your agency's service

standards and policies to provide guidance on balancing cost efficiency and service. This information influences the basic service configuration of the transit system. It is also helpful to become familiar with service scheduling terminology:

### Route Structure

The route structure defines where each vehicle travels on a route within the service area, and is related to the interconnectedness of the entire service network. The route is determined based on demand.

### Span of Service

The span of service defines the hours of operation for each route. It is measured from the beginning of the first trip on the route to the end of the last trip on the route. Ridership demand will also play a critical role in determining the span of service and may influence weekday, weekend, and holiday service.

### Service Frequencies

Service frequencies, or headways, define the time intervals between each vehicle. There are three types of frequencies.

- **Policy Frequencies:** A policy or standard that establishes how often a vehicle is scheduled to come by on a route. These are usually set in “clock multiples” such as every 5, 10, 15, 30, 45, or 60 minutes. The benefit of policy frequency service is that customers know a bus will come at fixed intervals. This type of service can create cost inefficiencies by requiring excessive layover/recovery time to keep the time between vehicles constant.
- **Demand-Based Frequencies:** The service is directly related to the number of customers riding at one time and the vehicle capacity required. This service requires information about customer loading requirements, which can be obtained through ride checks or point checks, basically riding the route to make certain that it can meet schedule during regular daily conditions. Meeting customer load requirements often requires adjustments in service frequency, multiple trips, vehicle size and capacity.
- **Performance-Based Frequencies:** Performance-based frequencies are based on targeted performance standards and are goal oriented. There are several formulas that can be used to establish performance measures. If this type of service is offered at your agency, it will be important to obtain the required data to set this schedule.

### Time Points

Time points are stops along the route. They are generally located at major intersections or drop off points in commercial, medical or government centers.

### Terminal Points

Terminal points refer to the end points of each route. Terminals should be placed in locations that provide driver safety and comfort, including places where drivers can use a restroom or get refreshments. A circular route will have one terminal; linear routes will have two terminals.

## FIXED ROUTE SCHEDULING

Once you know the basic service configurations, you will be able to develop the fixed route service schedule. The process of developing a fixed route schedule can be divided into four tasks:

- Trip building
- Blocking
- Runcutting
- Rostering

### Trip Building

Trip building is the process of creating the master service schedule.

Trip Building:

- Indicates when revenue service vehicles are scheduled to be at specific locations
- Requires input from planners and operations staff
- Requires information to determine time points, define route structure, and measure running times
- Depends on accurate data for reliable and efficient service

### Trip Building Considerations

During the trip building process, specific information is generated and needs to be considered within the master schedule:

- Cycle time: how long it takes to complete one full route
- Layover/recovery time: how much time is required for driver breaks
- Vehicle headway: the time interval between vehicles on the same route
- Vehicles per route: how many vehicles can operate on

the same route (given capacity constraints, staffing and budget)

- Timed transfers: at what points on the route there are transfers to other routes and the appropriate timing of those transfers
- Interlining: are there other routes that run along the same route and can the schedule be written to provide the most optimal service in this area?

The result of the trip building task will be timetables that define where the vehicles travel and at what time they will arrive at a specific location.

### Blocking

The second task in fixed route scheduling is blocking, which is the process of developing assignments for each vehicle in a single workday.

Blocking:

- Optimizes the number of vehicles required to provide service and minimizes time without passengers (often called “deadhead”)
- Serves as the basis of revenue and non-revenue vehicle operating costs
- Influences labor costs
- Uses the master schedule and policies on layover/ recovery time, layover locations, and interlining
- Uses tools, such as blocking sheets, block summary recap forms, and block graphing

### Runcutting

Runcutting is the process of developing driver assignments. The assignments or “runs” are assembled, or “cut” from the block.

- Runcutting determines the number of drivers needed to operate the service indicated in the master schedule
- Runs are developed to create either straight runs (a single block of approximately 8-10 hours of continuous work for one employee) or split runs (two blocks of work with unpaid break time between the blocks)
- Runcutting requires the master schedule, blocking sheets (the visual overview of the blocks that need to be individually staffed), block summary recap (summary information about block pull-in/pull-out location and times), and knowledge of agency policies and procedures (for specific requirements about staffing, vehicle use, and service area)

- Work rules that impact runcutting are minimum and maximum platform time, report allowance (how much time before a driver starts driving that can be charged) and turn-in allowance (time paid to the driver for reporting to the dispatcher at the end of the shift), spread time (the total time between the first report time and the final turn in time) and spread penalty (the time paid to the driver), relief locations and allowance (time for traveling between a stop and a relief location), make-up time (difference between time actually worked and the minimum that is guaranteed to the employee), and run type percentages (the requirement by an agency for how many runs are allowed to be split vs straight)

### Runcutting Process

Runcutting follows this process:

- Estimate the number of runs
- List the blocks
- Create a run guide
- Optimize the runs

### Rostering

Rostering is the process of grouping daily driver runs into weekly packages. There are two basic ways rostering is performed:

- **Driver-developed rosters:** A driver chooses specific daily runs and days off from a master list created by the agency
- **Agency-developed rosters:** A driver chooses from a weekly schedule the agency develops

## MODULE 3: SOFTWARE

*This section was modified, with permission, from the National RTAP Scheduling and Dispatching Training Package for Rural Transit Systems, REVEAL's website, and Transit Wiki. It includes original material and based on feedback from transit providers in Kansas.*

### SELECTING TECHNOLOGY PACKAGES TO MEET AGENCY NEEDS

Using technology can enhance the efficiency of daily operations at an agency. However, adding new technology solely to have the latest gadgets can be a needless expense for transit agencies. The additional cost of technology that should be considered include the cost of hiring additional staff to operate and maintain the software, the cost of the resources used to manage and analyze the data retrieved from the software, and the cost of training staff on the new technology. Because of these considerations, technology should be added to meet specific needs of a transit agency. It is important that all facets of the organization that will be directly or indirectly impacted by the project be represented on the project team and be involved in all phases of the project, including dispatch, operations, management, maintenance, Information Technology and governance.

Additional factors should be evaluated when deciding if an agency should adopt new technologies. The factors include resource requirements, integration with other existing and planned technology, scalability, implementation, and maintenance.

### RESOURCE REQUIREMENTS

- Are the capabilities offered by the technology needed by the agency?
- Does the agency have the capacity for data transmission and data storage to support the technologies?
- Are there staff resources to analyze data?

### INTEGRATION WITH OTHER EXISTING AND PLANNED TECHNOLOGY

- Is there interoperability between existing and planned technologies?
- Is the proposed application a component of the regional Intelligent Transportation Systems (ITS) architecture, which is a specific, tailored framework for ensuring institutional agreement and technical integration for the implementation of ITS projects or groups of projects in a particular region?

### SCALABILITY

- Does the technology allow for flexibility when fleet size or number of staff changes?

### IMPLEMENTATION

- Is there a plan for testing technologies on a subset of vehicles?
- Is adequate time allowed for training?
- Are there resources to train all agency staff?

### MAINTENANCE

- Does the agency have staff resources and competencies to maintain the proposed systems?

If a transit agency decides it is in their best interest to utilize technology in their operations, they should invest enough time and resources into training staff on the technology. Proper training is critical for realizing the potential of new technology.

### MICROSOFT OFFICE

For small agencies, the use of Microsoft Excel may be enough for the scheduling of vehicles. Microsoft Access has tools that allow users to create templates that would be ideal for creating rider databases. It is recommended to bring on a software specialist to identify if Microsoft Office is a savvy enough tool for the agency and to optimize its use.

### COMPUTER AIDED DISPATCH/AUTOMATIC VEHICLE LOCATION

Computer Aided Dispatch (CAD) is a method of using computers to dispatch transit vehicles. CAD can be used to send and receive messages and/or store data.

Automatic Vehicle Location (AVL) utilizes computers and Global Positioning Systems (GPS) to track and dispatch transit vehicles.

In a CAD/AVL system, scheduling and dispatching software are connected to vehicles via a tablet or mobile data terminal. CAD/AVL systems collect data such as GPS locations, vehicle status, and emergency incidents. Drivers can be provided with maps and directions for each segment of their route which are sent to their mobile computers. This allows dispatchers to have greater access to information regarding vehicles, thereby increasing the efficiency in how they assign vehicles to routes.



CAD specifically can be used to perform functions such as creating assignments, tracking driving behavior, and keeping records of crashes. AVL, however, provides real time GPS updates. This allows in-transit vehicles to be re-routed in real time.

The benefits of CAD/AVL systems include the reduction in non-revenue miles due to vehicle optimization, greater coordination with other regional transportation providers, increased security through improved communications and knowledge of driver locations, and increased customer satisfaction due to decreased passenger wait times and improved on-time performance.

## REVEAL MANAGEMENT SOFTWARE

REVEAL Management Service is a software funded by KDOT's Public Transit program. REVEAL is self-described as "a technology and operations management firm based in Kansas." The firm aids transportation agencies with reducing operational expenses and increasing transit performance and productivity. REVEAL provides customized solutions and assistance to fixed route systems, Americans with Disabilities Act (ADA) paratransit services, demand response transportation, and Non Emergency Medical Transportation (NEMT). REVEAL has training and operating guides for users of the software.

## GOOGLE TRANSIT

Google Transit is free planning tool that merges collected agency data, such as transit stops, routes, schedule and fares, with the capabilities of Google Maps. This service can be easily used by riders via a desktop or mobile device to familiarize themselves with their local transit such as the options available and what routes are most pragmatic for their given trip. Agencies can opt in to linking their website to further promote their service to riders.

## MODULE 4: CUSTOMER SERVICE DRIVEN COMMUNICATION

*This section was modified with permission from the National RTAP Scheduling and Dispatching Training Package for Rural Transit Systems. It includes original material and uses feedback from transit providers in Kansas.*

A key factor in effective communication as a dispatcher is professionalism. As a representative for your agency, it is essential to maintain a professional demeanor in tone of voice, word choice, and attitude. Furthermore, since the majority of communication between transit drivers and dispatchers via radios can be overheard by passengers, radio communication should be treated as public conversation.

Photo courtesy Flint Hills ATA



### RADIO USE

In vehicle radios are relied on heavily for communications between drivers and dispatchers. Because of this, agencies should have the following standards:

- Radios should be tested during pre-trip inspections
- Radios should remain on and monitored during work hours
- In-progress conversations should only be interrupted for emergencies. In the case of an emergency, follow your agency's policies and procedures
- Radio use should be limited to transit employees. Passengers are not permitted to use radios
- Communication via radio equipment should remain professional at all times
- If using state radios, the standard etiquette that applies to all statewide 800 MHz systems must be followed. Refer to the State policy ([http://www.kansastag.gov/AdvHTML\\_Doc\\_Upload/Communications%20Policy%20NEW.pdf](http://www.kansastag.gov/AdvHTML_Doc_Upload/Communications%20Policy%20NEW.pdf)).
- Specific details about passengers should not be shared via radios as per HIPAA regulations.

### 800 MHZ RADIO POLICY APPROPRIATE LANGUAGE

According to State policy, users of the communication system should use the following protocols:

The following are considered unacceptable:

- Slang, humor, or facetiousness are prohibited
- Citizen band (CB) radio terms and "lingo" are not acceptable. Slang words and phrases are not to be used. Humor or facetiousness is improper on the radio.
- Discourtesy, sarcasm or venting of animosities, even in voice inflection or modulation, will not be allowed.
- Courtesy is best expressed on the air by the tone of voice and manner of message presentation. Use of the words "thank you; you're welcome; or please", are not appropriate terms for radio broadcast.

### Messages to be Concise

The radio is not a telephone and will not be operated as such. Messages will be concise and to the point, while relaying all pertinent information.

**Avoiding Interference with Transmissions**

All users will monitor the radio frequency/talkgroup before transmitting in order to avoid interfering with or overriding another unit's transmission.

### Personal Messages Prohibited

The radio communication system is for official traffic and messages shall be brief and impersonal. Transmitting of personal messages is prohibited.

**Radio Calls to other users of the radio communications system**

- Every radio transmission will be initiated with the user or station identifier calling, followed by the user or station identifier of the called unit or station
- Calling unit will wait for acknowledgement by the called unit, before proceeding with radio transmission

### Messages Concluded

At the conclusion of a message received, the receiving unit will acknowledge receipt of the message as per their organization guidelines.

## EIGHT STEPS OF CUSTOMER SERVICE COMMUNICATION

Transit is a customer service oriented industry. For a service agency to run smoothly, it is essential to have positive interactions with customers. These eight steps of customer service identified by the National RTAP Scheduling and Dispatching Training Package for Rural Transit Systems will increase customer satisfaction. These tips are beneficial for interactions with coworkers as well.

### Greeting

- Answer the phone within three rings
- State your name as well as the name of the agency for which you work.
- Ask for the caller's name (Use it frequently throughout the call.)
- Say "How may I help you?" or a professional variation of the question.

### Speaking tone

- Always smile while speaking (This creates a warm, welcoming tone.)
- Speak with an energetic tone to project confidence
- Speak at a rate and volume that can be easily understood by the customer.

### Avoid

- Avoid chewing gum and eating while talking.
- Avoid taking negative comments personally. Hostility is often a reflection of the caller's mood, not you as a dispatcher.

### Listen

- Listening is a key component to effective communication. Active listening is more productive than passive listening.
  - Indicate you are listening by saying: "Yes" or "I understand"
  - Pay attention to the content the customer is saying. Take note of their tone to identify their mood. This will aid in fully understanding their needs and how to properly respond.
  - Focus on what the customer is saying rather than how you plan to respond to avoid missing important information.
- Take notes of the information listed below. Consult your specific agency policy to verify if more information should be collected.

- First and last name (include pronunciation tips)
- Phone number with area code
- Pick-up time requested
- Destination
- Information about the return trip
- Assistance needed (walkers, wheelchairs, service animals)
- Seat needed for companions or Personal Care Attendant

### Understand

- Restate the customer's questions and/or request to ensure you fully understand the reason for their call. When doing so, place emphasis on repeating the notes you took pertaining to the facts.
- Ask questions to obtain missing information or to clarify any confusion.

### Respond

- Speak in simple terms for a layman to understand. Avoid acronyms.
- Notify the customer if you are able to fulfill their request or answer their question. If you are not able to, explain to them the reason such as policy or schedule restriction. Suggest an alternate solution. Do not just reject a request or leave a question unanswered.
- Make the message consistent to minimize confusion
- Be concise with your response to minimize the chance of the essential information being missed

### Deliver

- Review what you have agreed to do
- If a callback is required, ask for the best time to call
- End call with a positive closing and thank the caller for using your service

### Reflect

- Once the interaction has ended, reflect on what went well and what could be improved on in future interactions.

## **COMMUNICATING WITH INDIVIDUALS WITH SPECIAL NEEDS**

Transit programs allow people with special needs to live more independently than they would if they didn't have access to transportation. The transit dispatcher is a lifeline for these individuals. As a dispatcher, you will communicate over the telephone with individuals who may have speech or intellectual disabilities and it is important to be patient so that they are able to get the transportation they need. When speaking with someone who has communication difficulties:

- Speak slowly and clearly
- Only use easily understandable words and direct sentences
- Give exact instructions and do not give too many instructions at one time
- Don't pretend to understand someone if you do not; ask them to repeat what they have said if you cannot understand them
- Be prepared to repeat the same information in more than one way in order for the person to understand

## MODULE 5: DEESCALATING COMPLICATED SITUATIONS

This section was modified, with permission, from the National RTAP Scheduling and Dispatching Training Package for Rural Transit Systems, and script language from Sedgwick County Division on Aging. It includes original material and based on feedback from transit providers in Kansas.

There are different types of calls you will receive as a dispatcher. Customers may call requesting general information, information on their ridership accounts with the agency or calls with a complaint or a grievance. Complaints and grievances require preplanning to appropriately manage the situation.

Informational calls focus on obtaining basic information such as phone numbers, service hours and areas of service. Having this information available and easy to access (such as located on the wall by your desk or in a binder) will make these questions quick and easy to answer.

### BASIC INFORMATION FOR QUICK REFERENCE

Dispatchers get the same information calls often; have this information close to the phone for ease in responding!

- Service hours
- Service area
- Fare amounts
- Basic policy questions
- Phone numbers for taxi companies
- Phone numbers for other local transit providers (or volunteer services)
- Phone numbers for local social service agencies and the library

**Ridership calls** focus on questions regarding the rider's account. For ridership calls, it is important to keep in mind the account holder must provide written permission to release information regarding their account to anyone not on the account. A form must be filled out by the account holder and the party requesting information. Refer to your agency manager for this form.

**Complaints and grievances** tend to be more difficult calls. During these calls it is best to take note of as many details as possible including date, time of call, caller's



Photo courtesy Flint Hills ATA

name and reason for calling. There are also forms to fill out that will be provided in the supplementary materials section of this manual that can be utilized to record this information. If possible, always end these calls by saying: "Thank you for sharing this helpful information. I assure you that it will be investigated. We appreciate your call. Good-bye."

*Complaint calls* can be minor and major. A minor complaint call would be a rider reporting minor annoyances such as a vehicle not meeting their standard of cleanliness or the vehicle being an unpleasant temperature. A major complaint call would be a rider reporting inappropriate behavior of the driver such as not complying with agency policy, driving recklessly, and not obeying the speed limit. A complaint form should be completed for complaints. Follow your agency process for filing the complaint.

*Grievances* are complaints that are potentially based on discrimination. Title VI provides protection from discrimination based on race, color and national origin. The ADA provides protection from discrimination based on disability. Riders cannot be excluded from utilizing transit services for those listed reasons. A grievance form should be completed for these types of calls. Follow your agency processes for filing these types of grievances.

*Difficult or irate* callers may be yelling, cursing, or ignoring agency policies. Be mindful that if the disgruntled caller's concern can be identified as a complaint or grievance, follow the above procedures and documentation process.

When interacting with a difficult customer, keep in mind that you are not the root cause of their hostility and/or frustration. You are merely the target of it. Additionally, dispatchers should maintain a calm tone. If you feel yourself becoming aggravated, speak at a slower pace and take deep breaths.

Customer hostility should not always be responded to. There are situations where it is best to avoid an altercation than to engage with a hostile customer. If a customer makes a snide remark or has an unpleasant tone, it is best

to ignore it. However, if a lack of response on your part can cause the situation to escalate or if the issue requires a solution, engage with the customer. Examples of this include customers disobeying service policies by making threats or a customer being verbally abusive due to being billed incorrectly.

The following methods should be used to handle difficult or irate callers.

- Express interest in resolving the issue without agreeing with or condemning the customer's behavior.
- Ask open-ended questions that focus on the facts. The five W questions are perfect (who, what, where, when, why). Repeat their response with empathy.
  - "You're upset because you have lost your bag and you believe you have left it behind on the bus. Is this correct?"
- Refrain from committing to unfeasible solutions. Only offer solutions that you can guarantee.
  - "I can ask the bus driver to look on the bus," "I can look in the lost and found," and "I can write a report."
- If the customer continues to be abrasive, communicate the ground rules with a non-threatening tone. Inform the customer of the potential outcomes of their remaining hostile vs. communicating respectfully. Consequences should be reasonable and enforceable.
  - "If you continue using foul language, I will not be able to help you and I will end this call. However, if we can communicate calmly, I can continue helping you resolve this issue."
- If the customer is persistent with their hostility, transfer them to a co-worker, manager or supervisor.
- First notify the caller that you are transferring them and identify the person to whom you are transferring them.
- Before completing the call transfer, take note of the caller's name, the reason for their call, options that have been offered to the caller, and the caller's contact information.
- While transferring the call, put the caller on hold and remain on the line until the transfer has been completed.

- When the person to whom you are transferring the call answers, share the notes you have taken regarding the call, so they are up to speed on the situation.
- If no one answers, notify the caller and let the caller know they will be contacted as soon as someone is available. Then, simply end the interaction by wishing the caller a good day.
- Make certain that any communication is documented and properly filed.

### **GRIEVANCES— TITLE VI AND ADA**

Federal regulations allow any person who believes that they have been aggrieved by an unlawful discriminatory practice under Title VI or ADA has the right to file a formal complaint. Title VI requires that no person in the United States, on the grounds of race, color, gender or national origin be excluded from the participation in, be denied the benefits of, or be otherwise subjected to discrimination under any program receiving federal assistance. The ADA prohibits discrimination and ensures equal opportunity for persons with disabilities in employment, governmental accommodations, commercial facilities and public transportation. All agencies that apply to the aforementioned qualification must have grievance processes and they must be followed closely if a grievance is filed.

## MODULE 6: EMERGENCY RESPONSE MANAGEMENT

*This section was modified, with permission, from the National RTAP Scheduling and Dispatching Training Package for Rural Transit Systems. It includes original material and based on feedback from transit providers in Kansas.*

### INCIDENTS AND/OR EMERGENCIES

Dispatchers play a vital role in emergency management. They are held responsible for assisting drivers and being the main line of communication between driver, the agency, and emergency responders. Dispatchers can reference agency's incident and emergency policies guidelines to formulate a response when there is a problem.

### KEY PLAYERS

The communication among key players involved with incident management and the intercommunication between them greatly impacts the effectiveness and timeliness of incident management. The key players include the driver, the dispatcher, the 911 dispatcher, and emergency responders. These key players should know their roles and duties.



- Driver: The driver is responsible for:
  - Evaluating the situation by identifying personal injuries as well as passengers' injuries
  - Relaying information on passenger injuries to dispatchers, so they can be shared with emergency responders
  - Immediately contacting dispatch
  - Securing the immediate vicinity of the incident by asking bystanders to leave and putting cones around the vehicle (if applicable)

- Transit Dispatcher: The dispatcher serves as the communication line for the drivers. Dispatchers are responsible for:
  - Implementing a proper response based on local emergency management policies
  - Coordinating the transportation resources necessary
  - Determining the emergency response units to be sent to the scene
  - Contacting emergency services for assistance
  - Providing drivers with information updates
- 911 Dispatcher: The 911 dispatcher is the initial connection between the transit agency and emergency responders. He or she is the main point of contact with emergency responders until units arrive and take control of the scene.
- Emergency Responders: Each emergency responder has a role.
  - Police secure the scene and investigate
  - The Fire Department handles fire suppression, hazard mitigation, and rescue
  - Emergency Medical Services assist with health problems and treat passenger injuries

### RESPONSE CYCLE

The response cycle provides the steps dispatchers should follow when responding to an incident. Dispatchers will be empowered to make informed decisions when following the steps listed in the response cycle. Your agency should create a response cycle process for dispatchers that is specific to staffing and agency policy. This document should be located adjacent to your dispatching station. If one hasn't been created, discuss the creation of a document with your management.

### BE PREPARED

It is essential for dispatchers to always be prepared for emergency situations. This will empower dispatchers to remain calm and confident when an incident arises. Dispatchers should familiarize themselves with their agency's policies and procedures, at each training day review protocols for reporting emergency situations, and keep lists of key resource agencies in an easily accessible location.

## CLEAR COMMUNICATION

Regardless of whether a dispatcher is in communication with a bus driver or emergency responders, it is critical the information dispatchers provide is communicated in a timely, concise, and accurate manner and is delivered calmly. To successfully achieve this, dispatchers should:

- Proactively listen to the caller and repeat the message to minimize errors
- Provide explanations that laymen can understand and avoid acronyms
- Provide a knowledgeable response and verify the caller understands
- Speak with calm and concerned authority

## INCIDENT MANAGEMENT

During an incident, minor or severe, a dispatcher must remain in communication with the driver. There are two main strategies for handling emergency situations. The two options are shelter-in-place and evacuate. For both options, encourage the driver to remain calm. Listen closely to what he or she is reporting.

### SHELTER IN PLACE

There are scenarios when transit employees and passengers would be most protected if they remain in the transit vehicle while awaiting emergency services to arrive. In these cases, direct the driver to:

- Turn off the HVAC systems in case a crash or other incident were to cause combustion
- Close windows and doors in case gases outside the vehicle could impact breathing
- Keep the vehicle moving out of the contaminated area if possible
- Stay away from flammable liquids or gases

Examples of incidents in which the shelter-in-place method should be utilized include vehicle crashes that do not involve fire, severe weather that impedes travel, and medical issues on the vehicle. Vehicular crashes may range in severity, but generally speaking, it is safest to wait in the vehicle while emergency providers are enroute to the scene of the accident. Similarly, severe weather can pose a threat to transit safety. The following steps should be followed by a dispatcher for either instance:

- Direct drivers to keep passengers inside the vehicle and keep vehicle hazard lights on
- Work with the driver to identify and address safety hazards at the scene, such as potential fires, fluid leaks, broken glass or moving traffic

- Have drivers verify passenger safety
- Take note of details regarding the location of the crash that need to be communicated to emergency responders
- Call 911 or the appropriate emergency responders in accordance with your agency's policies and follow their advice
- Advise employees not to talk to the media (for vehicle crashes)
- Keep drivers updated on relevant information (i.e. weather conditions, route changes, and status of vehicles in area)

If a passenger experiences a medical emergency on the bus or at a bus stop, it is essential dispatchers collect vital information from the driver about the incident to enable emergency responders to react appropriately. The dispatcher should relay this information quickly to emergency personnel and keep communications open with the driver.

- What is the problem?
- Is the person conscious or unconscious?
- Is the person breathing?
- What is his/her age, gender, and known medical condition?
- Has any first-aid been administered by the driver or other passengers?

### EVACUATE

A vehicle or facility must be evacuated if there is an imminent threat or immediate danger to employee and customer safety. In directing an evacuation, make sure that the on-scene employee:

- Has a specific destination and route for evacuating passengers
- Does not move seriously injured people unless they will be exposed to greater harm in their current location
- Enlists assistance from able-bodied passengers or others with elderly and disabled passengers
- Maintains communications with employees executing the evacuation and keeps them updated on what is being done to assist them
- Maintains communications with those sheltered in place and keeps them updated on what is being done to assist them

Examples of incidents in which the evacuation method should be used include fires and bomb threats. Bomb threats will be discussed later in this chapter. Fires spread quickly. Flames are not the only threat. Many deaths from fires are caused by asphyxiation from heat and smoke.

Because of this, the main goal should be to relocate employees and passengers a safe distance away from the flame. The following steps should be followed by the dispatcher:

- Direct the driver to perform a safe evacuation of the vehicle
- Direct the driver to distance himself or herself and passengers from the vehicle and stay uphill and upwind if possible
- Collect appropriate information about the incident (location, names of passengers and drivers, current status of all involved) and request emergency assistance
- Direct employees to follow the instructions of emergency responders on-scene

In cases of hazardous material spillage, follow the procedure below.

If there is a hazardous materials release on or near one of your routes:

- Follow the advice of local emergency officials by staying in contact through the response cycle
- Reroute vehicles uphill, and upwind of the release to minimize exposure
- Direct the drivers to shield themselves and their passengers from the contamination by:
  - Closing vehicle windows and doors
  - Minimizing air movement
  - Being patient and remaining calm
- Keep communications open and know the status of all employees and vehicles in the area

For security-related incidents such as suspicious activity or a suspicious object, bomb threats, and suspected bombs, it is imperative for dispatchers to respond swiftly and calmly.

Suspicious activity can be described as the following:

- A person loitering or acting in a disorderly manner on your vehicles or agency property
- Someone abandoning and/or hiding a package and quickly leaving an area
- A person observing your operations and/or expressing an unusual level of interest in your operations, facilities, personnel, or equipment
- A vehicle that is parked in an unusual location, shows signs of tampering, or is visibly overloaded
- A vehicle that appears to be following one of your agency's vehicles

Suspicious objects are items, devices, or substances that are out-of-the-ordinary for the surrounding environment. This can include objects with or without a threatening note attached or that:

- Have been hidden
- Are unclaimed by people in the surrounding area
- Are abandoned by someone quickly leaving the area

An Improvised Explosive Device (IED) is made up of four components: switch/timer mechanism, detonator initiator, explosive charge, and power supply. A suspicious object is elevated to the level of a dangerous object when it has an indication of some of the four components, which include:

- Visible wires, batteries, or tanks
- Clocks, timers, or cell phones attached
- Sounds emanating from it, such as ticking or buzzing

If there is reason to believe an IED is present on the transit vehicle, dispatchers should instruct employees and passengers to not handle, touch, or approach the object. Instead, they should all evacuate immediately and keep a safe distance from the object (at least one football field in distance away).

- Notify emergency responders providing as many details as possible about the object
- Instruct employees not to use cell phones or radios in the vicinity of the object
- Stop or redirect vehicles entering the area and expedite vehicle departures from the area
- Conduct security sweeps of all other vehicles and facilities in your system

## BOMB THREAT

If a bomb threat is made over the phone, it is imperative to handle the situation calmly and to initiate the following procedure:

- Refer to the bomb threat checklist (located in the supplementary material)
- Keep the caller on the line as long as possible
- Do not interrupt
- Ask questions—try to get as much specific information about the bomb as you can
- Note the time, date, and duration of the call and the exact words of the caller
- Notify your supervisor according to your agency's policies

## **TRANSIT'S ROLE IN EMERGENCY RESPONSE**

What is the role of your transit agency during a local emergency situation such as a weather event or a violent attack? The answer is different for each agency and depends on preparation and planning. The most important recommendation is to have a plan and to coordinate with emergency responders in the region. As the dispatcher, you are essential to that plan, as you may play the role of either directing transportation networks or collaborating with other emergency responders regarding logistics. If your agency has not trained you on your role in emergency response, ask your management about the key questions below and if these items are written in policy.

Before an emergency event occurs:

- Understand the role of the transit agency in regional emergency response
- Understand your role as the dispatcher
- Understand who has access to the vehicles and what they are allowed to do with them during an emergency
- Keep telephone numbers of essential personnel with you at your home in case of an emergency event
- Above all, consider safety first

## MODULE 7: FARE COLLECTION

*This section includes original material and based on feedback from transit providers in Kansas.*

Having a fare collection strategy can make accounting more consistent and reduce the uncertainty of missing fares. The following procedure is based on practices throughout Kansas and is a suggested method for fare collection.

- Dispatchers/schedulers should calculate estimated trip fares based on the agency's specific fares for in-town trips and out-of-town trips.
- Dispatchers/schedulers should develop the manifest with the runs for the day including rider fares. The total fare to be collected should be calculated for each run.
- Fares should be collected and removed from the vehicle at the end of each work day.
- A minimum of two employees should count the fares. The fares should be counted in the presence of everyone who will be involved in the collection of the fares. If more than one driver operated the vehicle during the day, the final driver would be involved in the counting of fares, or the fares would be counted at the end of each shift.
- The counted fare should be compared to the estimated fare.
- If the fares match, the fares should then be sealed in an envelope.
- All parties involved in the fare collection should write their initials with the date and time of the fare count on the envelope.
- The sealed envelope should then be placed in a locked container.

If during the process of fare collection it is found the fare collected does not match the amount expected, the following options should be considered:

- If the discrepancy is an isolated occurrence, it should be notated in the accounting records.
- If the discrepancy occurs two times or more in a month, it should be treated as a performance issue.

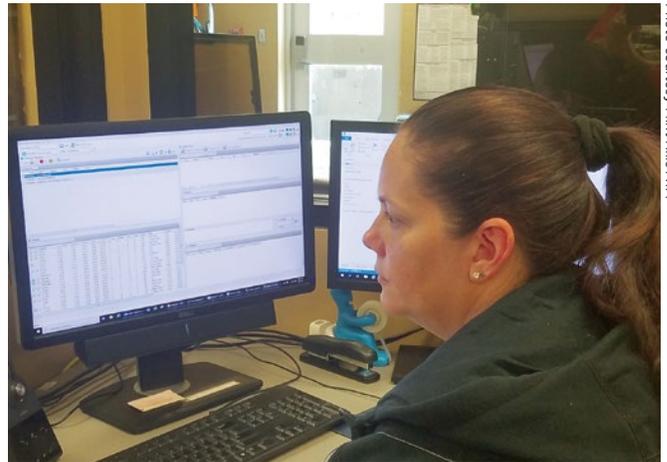


Photo courtesy Flint Hills ATA

## MODULE 8: ADA COMPLIANCE

*This section was modified, with permission, from the National RTAP Scheduling and Dispatching Training Package for Rural Transit Systems, Easter Seals Project Action, and the Disability Rights Education and Defense Fund. It includes original material based on feedback from transit providers in Kansas.*

### AMERICANS WITH DISABILITIES ACT

ADA Complementary Paratransit Service is required because of the Americans with Disabilities Act (ADA) for individuals with disabilities who are unable to use fixed route transportation systems. This service must be comparable to the level of service provided to individuals without disabilities who use the fixed route system and meet the requirements specified in Sections 37.123-137.133 of Transportation Services for Individuals with Disabilities (Part 37), Code of Federal Regulations, Title 49, Volume 1.



### ADA COMPLEMENTARY PARATRANSIT PROVISION OF SERVICE

Policies and procedures concerning ADA Complementary Paratransit provision of service may differ slightly from your operating policies. Provision of service policies may differ in these areas: Eligibility, seat belt use, wheelchair and other mobility devices, no-show policies, vehicle wait time, service back or flexible capacity, Personal Care Attendants (PCAs) or companions and service animals.

As a dispatcher, you may need to respond to and provide guidance to drivers on these service issues. You will need to be well versed in how the ADA provision of service impacts your decisions. Provision of service issues include whether service can be refused because a wheelchair cannot be secured to the satisfaction of the system, the type and level of driver assistance that is required, the ability to request that users of scooters transfer to a seat, scooter transport, and how life support systems are

accommodated. In addition, reasonable modifications to policies, practices and procedures may be requested in advance or at the time the trip is being taken in order to avoid discrimination or to ensure that the program is accessible to individuals with disabilities.

Because ADA Complementary Paratransit service is a federally required service that is intended to augment fixed route services, it is essential that thorough and appropriate documentation on all riders, trips and no-shows be developed and maintained. Follow your agency's procedures for specific ADA Complementary Paratransit documentation and retention.

### Eligibility

There are three types of eligibility: unconditional, conditional, and temporary.

- Unconditional eligibility: Riders are unable to use fixed route service (if available) under any circumstance.
- Conditional eligibility: Riders can use fixed route service under certain conditions. For instance, if the transit stop is within a reasonable distance from their home with minor obstacles such as steep hills. For this form of eligibility, agencies should notate all conditions that impede riders from utilizing fixed route service to ensure ADA regulations are being adhered to.
- Temporary eligibility: Riders are unable to use fixed route service for a limited period of time.

Applications that remain pending 21 days after submission are considered approved until formally denied by the transit agency. Additionally, paratransit eligibility is not dependent on residency. Customers outside of a paratransit service area may still apply for the service.



### Seat Belt Use

As the dispatcher, you will also need to be familiar with any policies regarding seat belt use and

wheelchair securement to ensure a person's civil rights are not violated. ADA policies and procedures may impact refusal of service for violent, illegal, or seriously disruptive behavior, so you may have responsibility to support drivers who experience these situations.

It is common for agencies offering demand-response service to have a policy mandating that riders wear seat belts while travelling. Dispatchers should refer to their specific agency's policies regarding seat belt use when handling a customer complaint about seat belt use.

## Mobility Devices

Dispatchers are responsible for offering guidance when issues regarding mobility device transport and securement occur. Common issues regarding wheelchair and other mobility devices include safely using the lift to accommodate the mobility device, requesting passengers using mobility devices transfer to a seat deemed to be safer, and drivers requesting instructions on properly securing a mobility device.

## No-Show Policies

A no-show is when the customer or customer's representative neglects to properly cancel the customer's scheduled trip at least 2 hours before the scheduled pickup. If a ride is cancelled within 2 hours of the scheduled pickup, it is considered a no-show unless it is for reasons beyond the customer's control.

If a driver arrives at an ADA pick up location, and it is an apparent no-show, he or she needs to be informed to call dispatch before leaving the location. The dispatcher should attempt to contact the customer to inform them that the vehicle is waiting. The attempted customer contact and any subsequent directions for the driver to leave should be documented by dispatch and the driver for future reference. At the same time, a determination should be made whether the return trip is still needed. Return trips should not be automatically canceled in the event of an apparent customer no-show because the passenger may still need that return trip. Each trip should be managed separately.

A no-show letter or door-hanger including the date and time of the missed ride should be provided to notify the rider of their no-show. The agency's policy regarding no show suspension should also be stated.

Suspensions can only be given to customers who show a "pattern or practice" of no-shows. The ADA does not permit no-show suspensions based on no-shows due to reasons beyond the rider's control nor due to the transit agency's error.

A minimum standard of no-shows within a given timeframe should be set by your agency to warn riders of possible suspensions. This will aid in enforcing the policy consistently. However, in order to ensure no-show policies are in compliance with ADA regulations, no show suspension policies should factor in the average no-shows the agency experiences, the number of no-shows the specific rider has, and the total number of trips the specific rider has taken. For instance, if an agency has a policy that states three no-shows within a month constitutes a suspension, and the agency's average

no-show rate for all riders is 10%, a rider should not be suspended for missing three out of thirty scheduled rides. Although it meets the stated policy, it is not above the average no-show rate, and therefore does not show a "pattern or practice."

When riders meet the criteria for suspension, the agency should notify the rider in writing of the reason they are eligible for suspension. This may be the role of the dispatcher, or the dispatcher may be in charge of providing the data to the person developing the letter. The letter should include the exact dates, times, pickup locations and destinations for the previous no-shows and the proposed suspension length. The process to appeal the suspension should be included as well as the process to report no-shows due to reasons beyond the riders control. There should be a minimum of 15 days between the receipt of the notice and the commencement of the proposed suspension.

Suspensions must be a reasonable length of time as defined by the United States Department of Transportation ADA guidance. The maximum suspension is 30 continuous days. However, agencies must have a progressive policy for suspending riders similar to the one below.

### Example Consequences of Pattern and Practice No-Shows

<b>1<sup>st</sup> Violation</b>	Warning (letter, doorhanger, phone call)
<b>2<sup>nd</sup> Violation</b>	2 day suspension
<b>3<sup>rd</sup> Violation</b>	5 day suspension
<b>4<sup>th</sup> Violation</b>	10 day suspension and temporary loss of subscription service
<b>5<sup>th</sup> Violation</b>	30 day suspension and long term loss of subscription service

**RIDERS CANNOT BE PENALIZED FOR NO-SHOWS FOR REASONS BEYOND THEIR CONTROL SUCH AS (THIS LIST IS NOT EXHAUSTIVE):**

- Family emergency
- Medical emergency
- Severe weather conditions
- Complications regarding personal attendant or mobility aid
- Rider's appointment ran late
- Vehicle arrived outside of pickup window
- Vehicle arrived to wrong location or driver waited at incorrect entrance
- Agency error in recording proper ride cancellation (Phone number to report no show beyond control should be provided on door hanger)

**Vehicle Wait Time**

ADA provision of service may also affect wait time requirements. Many systems direct drivers to wait for customers up to 5 minutes within the established pick-up window. For example, if the pick-up window is centered 15 minutes before and 15 minutes after the scheduled pick-up time (also referred to as the negotiated or confirmed time), the vehicle could arrive 15 minutes early and then be authorized to leave 10 minutes before the scheduled pick-up time. ADA customers may be confused by this practice and may think the vehicle should have waited until the pick-up time they were given. Every effort must be taken to educate the customer on agency wait time policies. A user guide should be part of the educational program.

**Service Back up or Flexible Capability**

Agencies that provide backup services via taxis or supervisor vehicles should also offer a sufficient amount of ADA accessible spare vehicles. This ensures the agency is treating all riders equally.

**Personal Care Attendants (PCAs) or companions**

A Personal Care Attendant (PCA) and a companion may accompany an ADA customer on a ride, but they must have the same origin and destination as the customer.

**Service Animals**

All transit drivers must be adequately trained in providing non-discriminatory services as per the ADA. A driver's lack of knowledge regarding ADA policies is not a valid justification of the policy being violated. Furthermore, concern for allergies or fear of the service animals are not valid reasons to deny service animal access to transit services.



Stock by Getty Images

Service animals must be accepted on transit. The U.S. Department of Justice solely protects dogs and miniature horses as service animals. The U.S. Department of Transportation continues to define a service animal as “any guide dog, signal dog, or other animal individually trained to work or perform tasks for an individual with a disability, including, but not limited to, guiding individuals with impaired vision, alerting individuals with impaired hearing to intruders or sounds, providing animal protection or rescue work, pulling a wheelchair, or fetching dropped items.” This policy can be found in Section 37.3 of 49 CFR Part 37- Transportation Services for Individuals with Disabilities (ADA).

Verifying the status of a service animal can be a delicate situation. There's a fine line that shouldn't be crossed. For instance, only two questions are permitted to be asked of the owner of the service animal. The two questions include:

- Is the animal a pet or service animal?
- What task is the service animal trained to perform?

Handlers are not required to disclose they will be travelling with a service animal while arranging transit services. However, transit schedulers may ask if a service animal will be accompanying them similarly as they are allowed to ask if a personal care attendant or mobility aid will be present.

Service animals can be suspended if they display aggressive or disruptive behavior towards other passengers or are not fully controlled by their owner. Disruptive behavior includes persistent sniffing of passenger's food or jumping on other passengers. The best way to handle this situation is to address it directly with the owner and to firmly state the consequences if the service animal's behavior isn't rectified. It is essential to document all conversations and incidents involving the service animal whose ridership is up for suspension. Having a written policy regarding this issue will strengthen the confidence of transit drivers in addressing the issue.

The handler of a service animal must be in complete control of the animal. This includes the requirement that the animal wears a leash or harness. However, the service animal is allowed to be off leash while performing the task they are trained to do if a leash or harness prohibits the animal from performing the task.

Handlers or service animals are responsible for managing interactions with their service animals and other passengers (notifying other people not to distract the animal).

#### **CLARIFYING COMMON MISCONCEPTIONS**

- Individual with disabilities must be granted the same service as individuals without disabilities. This includes not being limited to specific seats.
- The ADA defines a service animal as a dog or miniature horse that has been trained to perform specific tasks for "an individual with a disability." The USDOT extends that definition to all animals that provide a specific task. Transit agencies must use the broader definition.
- Emotional support animals are not service animals
- Service animals are not required to wear identifying material such as vest or id tags.
- Service animals cannot block aisles or exits.
- A city ban on specific breeds does not apply to service animals.
- Transit providers cannot charge a cleaning fee for service animals. However, transit providers may charge for damages caused by service animals if this policy is also enforced to individuals without disabilities.

## MODULE 9: ADVICE FOR HIRING AND SUPERVISING DISPATCHERS

*This section was modified, with permission, from the National RTAP Scheduling and Dispatching Training Package for Rural Transit Systems. It includes original material and based on feedback from transit providers in Kansas.*

High employee turnover can be costly for an agency. Additionally, it may give the agency a negative reputation, thereby increasing the difficulty in hiring new employees. Developing a strong team can be accomplished through the following five steps:

- Selective hiring
- Appropriate compensation
- Periodic evaluation of training materials
- Efficient delegation of duties
- Facilitating strong support systems
- Using technology

### TAKE CARE WHEN HIRING

- Ensure job postings thoroughly detail qualifications and job descriptions. This will minimize the discrepancy between what an applicant may expect of the position and what the position actually is.
- Hiring tests should be used in the hiring process to screen candidates. The tests should be personality oriented rather than technically oriented because it is easier to train a new staff member on tasks than to train for a positive attitude.
- Consider flexible shift hours to accommodate ideal candidates. Narrowing the position to full-time may alienate college students, parents with school-age children, retirees or others looking for a part time job.
- Bus drivers at the agency should be given priority for dispatcher positions. You will be familiar with their work ethic and competency, and they will be familiar with transit.

### APPROPRIATE COMPENSATION

- Dispatchers along with drivers are the “front line” of the agency. It is essential to ensure they feel valued to help run a successful agency by offering a fair wage and benefits such as health care and paid time off.

### Periodic evaluation of training materials

Managers should frequently welcome and encourage employee feedback on the content of training provided via structured surveys. The survey should include questions regarding employees thoughts on the training provided, such as how much it prepared them for their position, how relevant it was to their position, how useful it is to their position and suggestions on how to improve the training. This will keep the material relevant and fresh.

### EFFICIENT DELEGATION OF DUTIES

Dispatchers with the least amount of experience should start with radioing tasks. Dispatchers with more experience should be given the responsibility for route selection. There should be crossover of duties to prepare the newer staff for more difficult responsibilities.

### FACILITATING STRONG SUPPORT SYSTEMS

Dispatchers greatly benefit from scripts. This will increase the consistency of the information relayed to customers by the dispatchers. Additionally, scripts reduce the anxiety experienced by dispatchers during phone calls. There should be separate scripts for receiving and placing calls. Sample scripts are provided in the manual on page 31. These scripts can be amended to best suit the needs of your agency.

### USING TECHNOLOGY

Technology aids in increasing customer satisfaction by enhancing the services offered by transit agencies.

# SUPPLEMENTARY MATERIALS

## PHONE SCRIPTS

Phone scripts can be used to support dispatch and scheduling staff in many ways. First, the scripts can be used during training exercises to practice effective phone protocols. The trainer can have two participants read the script and then have a group discussion about the sequence. Why is the suggested language appropriate? What are some other methods for managing the situation? What would you do if the customer said [insert specific comment] instead?

Additionally, phone scripts can be kept on-hand at the dispatcher's desk in case of a situation when a dispatcher needs support during a phone call. Posting the script on a pin board by the phone or keeping the scripts easily accessible in a binder will allow the dispatcher to reach for the resource if a call becomes challenging.

*The scripts provided in this manual were modified with permission from the National RTAP Scheduling and Dispatching Training Package for Rural Transit Systems and additionally include scripts from the Sedgwick County Division on Aging and the Flint Hills ATA.*

### DISPATCHER/DEMAND RESPONSE - PHONE SCRIPTS

As a call taker, scheduler and or dispatcher your presence on the phone represents the agency and in many cases is a lifeline to a caller. **You are very important** and a key player on the team. The following scripts can be used for training or can be used to assist during phone calls in challenging situations.

#### ANSWERING A CALL

*(AGENCY NAME) transportation. This is (CALL TAKER'S NAME), how may I help you?*

#### PLACING A CALL

*Hi. This is (CALL TAKER'S NAME) with (AGENCY NAME) transportation. May I speak with (CUSTOMER'S NAME)?*

#### SCHEDULING

##### **If rider has not identified themselves, ask:**

- *What is your name, please?* Check the scheduling software to see if they are already in the system. If it's a new rider, get all the information needed to set up an account in the software program and inform them of the fare and how it can be collected.
- *Which date do you need transportation?* Verify agency policies regarding how far out a trip can be scheduled.
- *What is the address of the location you'd like to go and is there is an apartment or suite number?*
- **Time:** If it's for an appointment, work or function with time requirements, ask for the time they need to be there by.

For any other destination (Wal-Mart, restaurants, etc.) you may ask what time they would like a pick-up time, and share there is a 15 minute window before or after the requested time.

- *Do you need a lift or ramp accessible vehicle?* If no, ask: Are there any other mobility or medical devices you will be bringing with you? (i.e., walker, oxygen, crutch, etc.).
- *Do they have an attendant or will anyone else be riding with you?*

##### **Placing a call to schedule a trip with a rider:**

*Am I speaking with (CUSTOMER'S NAME)?* (Skip if customer identifying themselves when answering the call)

- *Are you still needing the ride for (Day/date the ride will take place)?*
- *Are (IDENTIFY LOCATIONS) the correct pickups and drops off locations?* (Address of pickup and drop-off should include apartment and suite number if applicable).
- Confirm if a mobility of medical device needs to be accommodated (i.e. lift, walker, oxygen, crutch, etc.)
- Confirm if an attendant or additional person be riding as well

## DIFFICULT/IRATE CUSTOMERS

The following methods should be used to handle difficult or irate callers.

- Express interest in resolving the issue without agreeing with or condemning the customer's behavior.
- Ask open-ended questions that focus on the facts. The five W questions are perfect (who, what, where, when, why).
  - "Where was the last time you saw your bag?" "What seat were you sitting in on the bus?" "When did you arrive at the grocery store?" "Who was your bus driver?"
- Repeat their response with empathy.
  - "You're upset because you have lost your bag and you believe you have left it behind on the bus. Is this correct?"
- Refrain from committing to unfeasible solutions. Only offer solutions that you can guarantee.
  - "I can ask the bus driver to look on the bus," "I can look in the lost and found," and "I can write a report."
- If the customer continues to be abrasive, communicate the ground rules with a non-threatening tone. Inform the customer of the potential outcomes of their remaining hostile vs. communicating respectfully. Consequences should be reasonable and enforceable.
  - "If you continue using foul language, I will not be able to help you and I will end this call. However, if we can communicate calmly, I can continue helping you resolve this issue."
- If the customer is persistent with their hostility, transfer them to a co-worker, manager or supervisor.
- First notify the caller that you are transferring them and identify the person to whom you are transferring them.
- Before completing the call transfer, take note of the caller's name, the reason for their call, options that have been offered to the caller, and the caller's contact information.
- While transferring the call, put the caller on hold and remain on the line until the transfer has been completed.
- When the person to whom you are transferring the call answers, share the notes you have taken regarding the call, so they are up to speed on the situation.
- If no one answers, notify the caller and let the caller know they will be contacted as soon as someone is available. Then, simply end the interaction by wishing the caller a good day.
- Make certain that any communication is documented and properly filed.

## BOMB THREAT CALLER INFORMATION TO NOTE THROUGH CONTEXT CLUES

If you receive a bomb threat by telephone, ask the questions on the following checklist in a calm manner while a colleague contacts the police department. Document all answers. Maintain the telephone conversation for as long as possible. Note the time of day and length of the call.

- When will the device explode?
- Where is it?
- What kind of bomb is it?
- What will set it off?
- Why are you doing this?
- Who are you?

### Information to note through context clues:

#### Sex:

- Male
- Female

#### Voice:

- Raspy
- Smooth
- Low
- Muffled
- Other : \_\_\_\_\_

#### Speech:

- Accent
- Lisp
- Fast
- Slurred
- Other: \_\_\_\_\_

#### Language:

- Foreign
- Foul
- Irrational
- Rational
- Other: \_\_\_\_\_

#### Behavior:

- Calm
- Angry
- Nervous
- Laughing
- Other: \_\_\_\_\_

#### Background Noise:

- Traffic
- Silent
- Talking
- Other: \_\_\_\_\_

## FORMS

Forms help agencies to have consistency in getting information from customers, whether it is related to dispatching or for complaints or grievances. If your agency doesn't have a form for these items, or if you are looking to update the current forms you are using, the forms located in this section can provide an idea of useful information to collect.

*The forms provided in this manual were modified with permission from OCCK.*

# TRIP DISPATCH FORM

DISPATCHER NAME: \_\_\_\_\_ CALL DATE: \_\_\_\_\_

TRIP DATE: \_\_\_\_\_

PASSENGER NAME: \_\_\_\_\_

PHONE NUMBER TO CALL BACK : \_\_\_\_\_

PICK UP ADDRESS (INCLUDE CITY AND ZIP CODE APT or SUITE #): \_\_\_\_\_

\_\_\_\_\_

DROP OFF ADDRESS (INCLUDE CITY AND ZIP CODE APT or SUITE #): \_\_\_\_\_

\_\_\_\_\_

APPOINTMENT TIME: \_\_\_\_\_

IS THIS A DR. APPOINTMENT (YES/NO)

IF YES - DR. NAME: \_\_\_\_\_

DR. PHONE NUMBER: \_\_\_\_\_

HOW LONG WILL THIS APPOINTMENT LAST? \_\_\_\_\_

DOES PASSENGER USE A WALKER/CANE/WHEELCHAIR/OVERSIZE WHEELCHAIR? (CIRCLE ONE)

IS PASSENGER AMBULATORY? CAN THEY CLIMB STAIRS OR DO THEY NEED THE LIFT? (YES / NO)

DOES PASSENGER HAVE A MEDICAID CARD? IF YES, IS TRIP MEDICAID PREAPPROVED? (YES / NO)

(If not, tell them to call their medicaid provider and request for this agency)

TRIP PURPOSE: (MEDICAL / MEDICAID / SHOPPING / SCHOOL / WORK / MISC)

HAS PASSENGER FILLED OUT THE PARATRANSIT ACCOMMODATIONS APPLICATION? (YES /NO)

IS ANYONE (PERSONAL CARE ATTENDANT OR OTHER) TRAVELING WITH YOU? (YES/NO)

COMMENTS: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

## **SCHEDULER TO FILL OUT:**

IS THE REQUESTED TIME AVAILABLE? (YES/NO)

EXPLANATION: \_\_\_\_\_

\_\_\_\_\_

IF NO, ALTERNATE TIME/DATE OFFERED: \_\_\_\_\_

WAS ALTERNATE TIME/DATE ACCEPTED BY PASSENGER? (YES/NO)

TRIP CANCELTION DATE AND TIME: \_\_\_\_\_

TRIP CANCELLED BY WHOM: \_\_\_\_\_

DRIVER NOTIFIED (YES/NO)

DRIVER NOTIFIED BY WHOM: \_\_\_\_\_



# INCIDENT FORM

NAME OF CALLER: \_\_\_\_\_

PHONE NUMBER: \_\_\_\_\_

TIME AND DATE OF INCIDENT: \_\_\_\_\_

TIME AND DATE OF CALL IN: \_\_\_\_\_

ROUTE: \_\_\_\_\_

NAME OF DRIVER: \_\_\_\_\_ BUS #: \_\_\_\_\_

DESCRIPTION OF INCIDENT: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

WHERE IT HAPPENED: \_\_\_\_\_

WEATHER CONDITIONS: \_\_\_\_\_ WAS IT PEAK TIME: (YES/ NO)

DRIVER'S RESPONSE: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

DRIVER SIGNATURE: \_\_\_\_\_

SUPERVISOR SIGNATURE: \_\_\_\_\_

COORDINATOR SIGNATURE: \_\_\_\_\_

## MODULE TRAINING ACTIVITIES

The following section includes several training activities for each module in the Dispatch Manual. These activities can be used during the onboarding of a new dispatcher or can be used as a refresher during regular staff trainings.

Section 3 of the Supplementary Materials includes the activities, as they should be presented to those participating in the training. Section 4 of the Supplementary Materials includes the correct answers to the module training activities.

*The modules provided in this manual were modified with permission from the National RTAP Scheduling and Dispatching Training Package for Rural Transit Systems and include original material from Kansas RTAP.*

### MODULE 1: DISPATCHER AND SCHEDULER RESPONSIBILITIES

#### MODULE 1: ACTIVITY 1.1 – A DISPATCHER’S DUTIES

Each item describes a typical scheduler’s responsibility. Read each item and select the correct answer.

Answers for the training modules start on page 65.

**1. The dispatcher is the System and Agency Coordinator. Which of these is not an essential role to these tasks?**

- a. Coordinating customer trips
- b. Tracking and monitoring routes
- c. Maintaining the agency budget
- d. Coordinating with the maintenance department for agency vehicles

**2. When you respond to a customer call, which factors should influence the decision you make?**

- a. Special customer requirements that impact which vehicle to send
- b. The type and level of driver assistance allowed
- c. The service area and hours of operation
- d. All of the above

**3. Your responsibilities when communicating with customers include all but the following:**

- a. Providing social service and counseling support
- b. Providing customers with any available transportation service options
- c. Advising customers of their trip status
- d. Taking customer requests for riders over the telephone

**4. Which of the following is necessary information to know about the agency in order to efficiently dispatch and schedule?**

- a. Service area
- b. Agency fleet size and type
- c. Agency service hours
- d. Specific information about personnel issues

## MODULE 1: ACTIVITY 1.2 – SCHEDULER DUTIES

Each item describes a typical scheduler's responsibility. Read each item and select the correct answer.

Answers for the training modules start on page 65.

### 1. Which of the following is not considered an important role of a scheduler?

- a. Build runs as effectively and efficiently as possible
- b. Make sure the requested ride time is maintained
- c. Build schedules that honor the requests of favored riders
- d. Develop daily manifests for drivers

### 2. What is generally not included in a manifest?

- a. Route or vehicle number
- b. Detailed medical information about the rider
- c. Driver assigned
- d. Fare required (if any)

### 3. The two main tasks of demand-response scheduling are:

- a. Schedule writing and subscription trip planning
- b. Route planning and schedule writing
- c. Schedule writing and optimization
- d. Route planning and assigning drivers

### 4. When scheduling trips, which of the following is important to consider?

- a. The amount of gas in the vehicle's tank
- b. The seat comfort for the length of the ride
- c. The actual travel speed for an area at a given time of day
- d. Whether the customer gets to ride on his or her favorite vehicle

## MODULE 1: ACTIVITY 1.3 – A DISPATCHER’S MORNING

Each item describes a typical dispatcher’s responsibility for coordinating the system. Read each item and place a check mark next to the task it describes.

Answers for the training modules start on page 65.

### 1. A customer requests information about his trip. Dispatcher confirms trip and indicates vehicle is on time.

- Route monitoring
- Customer coordination
- Agency coordination
- Driver communication
- Customer communication

### 2. A dispatcher adjusts two vehicle routes because a customer’s trip information changed.

- Route monitoring
- Customer coordination
- Agency coordination
- Driver communication
- Customer communication

### 3. A dispatcher contacts maintenance department to find out if a van has been repaired.

- Route monitoring
- Customer coordination
- Agency coordination
- Driver communication
- Customer communication

### 4. A dispatcher assists driver in finding pick-up location

- Route monitoring
- Customer coordination
- Agency coordination
- Driver communication
- Customer communication

### 5. After reviewing on-time performance for each run, a dispatcher adjusts vehicle wait time and schedule.

- Route monitoring
- Customer coordination
- Agency coordination
- Driver communication
- Customer communication

## MODULE 1: ACTIVITY 1.4 – RECORDING INFORMATION

Read the situation described below. Select the information that should be recorded.

Answers for the training modules start on page 65.

A frustrated driver calls dispatch to report he is in front of 76 year old Mr. Hubert's house. Mr. Hubert has not come out for his ride. The driver says he has waited the required amount of time and even knocked on Mr. Hubert's door. The driver says he is anxious to leave because he is in a "bad" neighborhood.

You instruct the driver to proceed after you are unable to reach Mr. Hubert on his home and cell phones.

### **What information should you provide to help investigate the missed trip?**

- Mr. Hubert's age
- Date
- Customer's name
- Driver knocked on door
- "Bad" neighborhood comment
- Phone attempts to reach customer
- Location arrival/departure times
- Driver frustration
- Driver name/vehicle number
- Pick-up time

## MODULE 2: SERVICE TYPES

### MODULE 2: ACTIVITY 2.1 – CREATE A DEMAND-RESPONSE SCHEDULE

In this exercise you will review trip requests, and determine travel times. Once you have collected the information you need, place the trips into a schedule.

Answers for the training modules start on page 65.

Other Information:

Pick-up window 15 minutes before to 15 minutes after requested time.

Drop-off window 15 minutes before to 0 minutes after requested time.

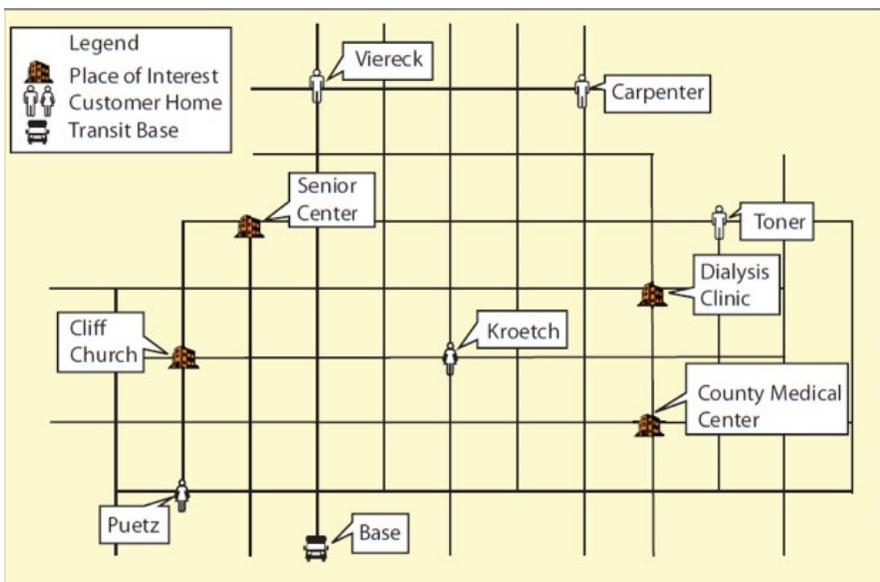
Each block requires 2 minutes of travel time.

Each customer requires 2 minutes to board/alight vehicle.

Maximum Ride Time = 45 minutes.

Vehicle leaves base at 7:00 a.m.

Trip Request		
<b>Name:</b> Puetz <b>Pick Up:</b> Home <b>Drop Off:</b> Dialysis Clinic <b>Requested Pick Up:</b> 7:30 a.m.. <b>Appointment Time:</b> 7:30 a.m.	<b>Name:</b> Kroetch <b>Pick Up:</b> Home <b>Drop Off:</b> Dialysis Clinic <b>Requested Pick Up:</b> 7:15 a.m.. <b>Appointment Time:</b> 7:45 a.m.	<b>Name:</b> Toner <b>Pick Up:</b> Home <b>Drop Off:</b> Cliff Church <b>Requested Pick Up:</b> 7:45 a.m.. <b>Appointment Time:</b> 8:15 a.m.
<b>Name:</b> Carpenter <b>Pick Up:</b> Home <b>Drop Off:</b> Senior Center <b>Requested Pick Up:</b> 8:15 a.m.. <b>Appointment Time:</b> 7:45 a.m.	<b>Name:</b> Viereck <b>Pick Up:</b> Home <b>Drop Off:</b> County Medical Center <b>Requested Pick Up:</b> 8:45 a.m.. <b>Appointment Time:</b> 9:15 a.m.	



Customer/ Location	Requested Pick Up Time	Appointment Time	Actual Pick Up Time	Arrival Time at Location or Customer	Actual Departure Time
<b>Drop Offs</b>					

## MODULE 2: ACTIVITY 2.2 – FIXED ROUTE SCHEDULING

Look at the various components of the fixed route scheduling process below, and order them in the proper sequence by labeling them #1-4.

Answers for the training modules start on page 65.

- \_\_\_ Runcutting: Developing driver assignments by estimating the number of runs, listing the blocks, creating a run guide, and optimizing the runs
- \_\_\_ Blocking: Developing assignments for each vehicle in single workday
- \_\_\_ Trip Building: Creating the master service schedule using data from schedulers, planners, and operations
- \_\_\_ Rostering: Grouping daily driver runs

## MODULE 2: ACTIVITY 2.3 – SERVICE TYPES

Write the letter of the appropriate service type next to each service description.

Answers for the training modules start on page 65.

- \_\_1. A driver who does not get paid and uses his/her own vehicle to respond to an agency request to transport a customer.
- \_\_2. A customer has a regularly scheduled morning and evening trip every Tuesday and Thursday so she can get to work.
- \_\_3. A customer calls to be picked up at a location within the corridor that is not a scheduled time point.
- \_\_4. The customer boards the vehicle and informs the driver to drop her off at the shopping plaza, which is a bit off the regular route.
- \_\_5. A customer picks up a small group of co-workers and they all go to the plant for the morning shift.
- \_\_6. Mrs. Miller has a disability, and can't walk to the bus stop on the route a few blocks from her home. She travels to the medical center for dialysis.
- \_\_7. Many customers call to schedule trips to different locations at different times.
- \_\_8. A customer wants to go to the mall, and goes to a specific stop at a specific time to get a ride.
- \_\_9. A customer reserves a ride from a company under private ownership due to the lack of public transit available.
- \_\_10. Co-workers make arrange to share the use and cost of their personal vehicles to travel to work together.

- A. Fixed Route
- B. Fixed Route Service with Route Deviation
- C. ADA Complementary Paratransit
- D. Reservation Service
- E. Subscription Service
- F. Vanpool Service
- G. Fixed Route Service with Point Deviation
- H. Taxicab Service
- I. Carpool Service
- J. Volunteer Drivers

## MODULE 2: ACTIVITY 2.4 - CALCULATING TRAVEL TIME

In this activity, answer each question based on the information you receive from your calculation.

Answers for the training modules start on page 65.

(Distance (in miles) divided by speed (miles per hour) ) X 60 minutes = Travel time (minutes)

**1. Mrs. Rodriguez has subscription service every Wednesday at 7:30 a.m. She travels 15 miles from home to work, and the vehicle averages 45 mph. What is the calculated travel time?**

- a. 18 minutes
- b. 19 minutes
- c. 20 minutes
- d. 21 minutes

**2. The main road along Mrs. Rodriguez's route is being repaved, and this has slowed the vehicle speed to 30 MPH. How many more minutes need to be scheduled onto her trip so she arrives to work on time?**

- a. 10 more minutes
- b. 15 more minutes
- c. 20 more minutes
- d. 25 more minutes

**3. Mr. Mandrake calls in a trip request. He is traveling from the library to the shopping center. What is the travel time based on these factors:**

**Distance from library to shopping center: 10 miles**

**Average vehicle speed: 25 MPH**

- a. 10 minutes
- b. 15 minutes
- c. 18 minutes
- d. 24 minutes

## MODULE 3: SOFTWARE

### MODULE 3: ACTIVITY 3.1 – IMPLEMENTING TECHNOLOGY

There are many myths and misconceptions about implementing new technology. Identify whether each of the statements listed below is true or false.

Answers for the training modules start on page 65.

**1. Implementing new technology always allows an agency to reduce staff.**

True  False

**2. Training employees on new technology, its capabilities, and its impact on existing business functions is critical to its success.**

True  False

**3. Technology implementation projects require agency-wide planning teams.**

True  False

True  False

**4. The more technology, the better.**

True  False

**5. The maintenance requirements associated with new technology can easily be absorbed by existing staff resources.**

True  False

## MODULE 4: CUSTOMER SERVICE DRIVEN COMMUNICATION

### MODULE 4: ACTIVITY 4.1 – CUSTOMER SERVICE AWARENESS

Read each of the descriptions below. Place a checkmark next to each behavior that will promote a customer supportive environment.

Answers for the training modules start on page 65.

1. \_\_ You wait patiently while your customer gives you information to schedule the trip. You know she takes pride in being independent.
2. \_\_ You only speak with acronyms because everyone should know them.
3. \_\_ You mock a customer when they pronounce a street name incorrectly.
4. \_\_ You answer the phone with a warm, welcoming tone.
5. \_\_ You speak at a rate and volume that is easily understood by customers.
6. \_\_ You take negative comments personally and become confrontational when callers use a tone of voice that displeases you.
7. \_\_ You tell customers whatever they want to hear to get them off the phone even if it means purposefully misrepresenting policies.
8. \_\_ You actively listen to customers and take notes while they are speaking.
9. \_\_ You decide not to help resolve the complaint because that is for your boss to do, not you.
10. \_\_ You end all calls with a positive closing.

## MODULE 4: ACTIVITY 4.2 – SEND A MESSAGE

Read each example below then select the statements that demonstrate effective communication.

Answers for the training modules start on page 65.

1. \_\_ The medical center called to say the customer would be ready in ten minutes. The scheduler wrote down the message, placed it in the dispatcher's mailbox, then left the building for his lunch hour.
2. \_\_ In order to inform a customer of a service suspension, the scheduler provides the customer a typed, formal letter indicating suspension details and appeal information.
3. \_\_ A dispatcher notices a wrong address on the manifest, and jots a note to the scheduler with the customer's name and correct address. He also mentions it when he sees her.
4. \_\_ When a customer calls to find out if his ride is on time, the dispatcher explains they are not psychic and do not know. Then, the dispatcher ends the call.
5. \_\_ When a driver calls to report smoke coming from the engine compartment, the dispatcher instructs the driver to pull over immediately and evacuate the vehicle.

#### MODULE 4: ACTIVITY 4.3 – FILTER THE CALL

Sometimes you need to be the “listening detective” to remove communication barriers and get to the pertinent information. Read the transcript of a message left by an upset customer. Write the information that will help you resolve the issue in the space below.

Answers for the training modules start on page 65.

*Hello, this is Mr. Morales. Last Tuesday, I was supposed to be picked up at the Longwood Market, and the bus was late. You really screwed up. I called the dispatcher, and she just told me lies. She said the bus would come in fifteen minutes. I could barely understand her because of her accent. I waited for an hour. Your service is rotten. This better not happen again because I need to be able to shop every week.*

## MODULE 4: ACTIVITY 4.4 – CHECK YOUR PROFESSIONALISM

Read each set of scenarios. Select the scenario that best demonstrates professional customer service skills.

Answers for the training modules start on page 65.

### 1. Dispatcher Scenarios

#### \_\_ Dispatcher Scenario A

**Customer:** Hi, this is Ms. Surrey. I'm on crutches today, so it's taking me longer to be ready. Is the bus on its way?

**Dispatch:** You need to be ready. The bus is... lets see... near Lakewood Shores Lane. You better hurry up. I can't hold the bus for you even if you are on crutches.

#### \_\_ Dispatcher Scenario B

**Customer:** Hi, this is Ms. Surrey. I'm on crutches today, so it's taking me longer to be ready. Is the bus on its way?

**Dispatch:** Ms. Surrey, I'll check for you. (pause) The bus is ... let's see... near Lakewood Shores Lane. I have another vehicle coming your way in two hours. Would that give you the time you need?

**Customer:** No, thanks. I think I can be ready.

### 2. Scheduler Scenarios

#### \_\_ Scheduler Scenario A

**Scheduler:** Ms. Surrey, would you like me to note your use of crutches in your records?

**Customer:** Well. I'll be using them for the next few weeks.

**Scheduler:** I'll note that for you (using a considerate voice). And you live at 12792 Lakewood Terrace?

**Customer:** Yes, I do.

**Scheduler:** Thank you for the information, Ms. Surrey. We appreciate it.

#### \_\_ Scheduler Scenario B

**Scheduler:** Ms. Surrey, (snapping gum and using a monotone voice) I need to verify your records.

You're going to be REALLY slow getting on the vehicle, right?

**Customer:** Of course it will take me longer. I broke my leg and I'm on crutches.

**Scheduler:** I'll note that. I hope you're not going to hold the bus up for too long every day. Other people besides you have to get to work. And you live at 12792 Lakewood Terrace?

**Customer:** Yes, I do.

## MODULE 4: ACTIVITY 4.5 – CLEAR COMMUNICATION

Read both of these dispatcher transcripts. Select the transcript that uses best communication practices.

Answers for the training modules start on page 65.

### \_\_ Transcript A

**Customer:** This is Mrs. Antonio. I want to check on my ride. I'm bringing my husband to the doctor.

**Dispatch:** The driver has your trip down at 11:10 am, for Mr. and Mrs. Antonio, at 22 Oakwood Court, is that correct?

**Customer:** Yes, it is.

**Dispatch:** And Mr. Antonio is requiring the use of a wheelchair?

**Customer:** Yes, he needs his wheelchair now.

**Dispatch:** Mrs. Antonio, your driver will be arriving in ten minutes.

**Customer:** Thank you very much.

### \_\_ Transcript B

**Driver:** I'm at the intersection of Main and Central Avenue. I can't find the location of Highwood Terrace Apartments.

**Dispatch:** (poor enunciation and pronunciation): Don't you realize that Highwood Terrace is north of Fifth Avenue, about seven blocks from where you are? You know, Fifth, like the number 5? I think you'd know that since you go there every day. Continue on Main. Are you going to pick up that deaf lady, Mrs. Edmond?

**Driver:** I'm picking up Mrs. Edmond.

**Dispatch:** When you get to the intersection hang a right then quick left, and go into the second cul-de-sac. HONK LOUD!

**Driver:** Please repeat.

## MODULE 5: DEESCALATING COMPLICATED SITUATIONS

### MODULE 5: ACTIVITY 5.1 – DEALING WITH DIFFICULT PEOPLE

A customer calls your agency with a complaint. Read the transcripts of the two complaints below, and select the response for each complaint that best continues the conversation.

Answers for the training modules start on page 65.

**1. Customer:** It's me again. I called you all last week and no one got back to me. Now I got this letter saying my service is cancelled. What's the matter with your company? All you do is screw up everything you try to fix. What do you mean my service is cancelled? I haven't done anything wrong except rely on your service. You don't know anything about helping people like me.

**\_\_ Response A:**

"CALM DOWN! Yelling at me isn't going to help you. You are only making me angry."

**\_\_ Response B:**

"You can continue to raise your voice and I will not be able to help you, or we can discuss the issue calmly so I can get the information I need to help you."

**2. Customer:** I am sick of riding with other people on my weekly trip to my hair appointment. I pay my [expletive] taxes and should get what I want. Last week, someone smelled so terrible that I almost vomited. The bus driver stepped on my [expletive] foot while he was helping someone with his wheelchair. I live next door to the mayor and I'm going to have her pull all your [expletive funding].

**\_\_ Response A:**

"Thank you for calling. I understand that you are frustrated, but I cannot help you if you continue to use foul language. I am sorry that the driver stepped on your foot. I can make a note of that issue so that as we are training for wheelchair securement, we discuss being more watchful of other passengers. As for your concern about riding with other passengers, because this is a public transportation service, our policies require that all of our trips be open to the public. I can discuss other transportation options with you that provide more personalized services."

**\_\_ Response B:**

"Excuse me, ma'am, you are very mean and your trip isn't very necessary. Go ahead and talk to the mayor."

## MODULE 5: ACTIVITY 5.2 – CALL TYPES

Write the letter of the appropriate call type next to each description. Terms may be used multiple times.

Answers for the training modules start on page 65.

- \_\_\_ 1. A customer calls to complain about the bus being too cold.
- \_\_\_ 2. A customer calls to verify the agency's service hours and service area.
- \_\_\_ 3. A customer believes they were denied service due to their race.
- \_\_\_ 4. A customer calls to ask a question regarding their account.
- \_\_\_ 5. A customer calls to report unprofessional behavior exhibited by driver.
- \_\_\_ 6. An upset customer calls and continually uses fowl language.
- \_\_\_ 7. A customer calls to report the sighting of a gum wrapper on the floor of a vehicle.
- \_\_\_ 8. A customer refuses to adhere to agency policies during a call and profusely yells at the dispatcher.

- A. Informational calls
- B. Ridership calls
- C. Complaint
- D. Grievances
- E. Disgruntled/irate customer

## MODULE 5: ACTIVITY 5.3– INFORMATION FOR QUICK REFERENCE

Listed below is the information a colleague has provided. Place a checkmark next to each piece of information that dispatchers should have available to quickly reference.

Answers for the training modules start on page 65.

- Service hours
- Local TV guides
- Menus for local restaurants
- Basic agency policy questions
- A list of most popular movies and television series on HULU
- Gossip magazines
- Agency service area
- Phone numbers for taxi companies and other local transit providers
- List of European transit agencies
- Agency fleet information
- Fare amounts

## MODULE 6: EMERGENCY RESPONSE MANAGEMENT

### MODULE 6: ACTIVITY 6.1 – RESPONDING TO EMERGENCY SITUATION

Below is a list of responders. Select an action and assign it to the most appropriate responder.

Answers for the training modules start on page 65.

#### 1. Secure immediate vicinity of incident

Transit Driver  Transit Dispatcher  911 Dispatcher  Emergency Responder

#### 2. Handle fire suppression

Transit Driver  Transit Dispatcher  911 Dispatcher  Emergency Responder

#### 3. Treat passenger injuries

Transit Driver  Transit Dispatcher  911 Dispatcher  Emergency Responder

#### 4. Determine the emergency response units to be sent to scene

Transit Driver  Transit Dispatcher  911 Dispatcher  Emergency Responder

#### 5. Contact emergency services for assistance

Transit Driver  Transit Dispatcher  911 Dispatcher  Emergency Responder

#### 6. Provide drivers with information updates

Transit Driver  Transit Dispatcher  911 Dispatcher  Emergency Responder

#### 7. Assess passenger injuries so information can be relayed to emergency responders

Transit Driver  Transit Dispatcher  911 Dispatcher  Emergency Responder

#### 8. Coordinate transportation resources needed to manage the incident

Transit Driver  Transit Dispatcher  911 Dispatcher  Emergency Responder

## MODULE 6: ACTIVITY 6.2 – COMMUNICATIONS WITH EMERGENCY RESPONDERS

A driver has just called into dispatch to report a crash involving his vehicle and a tractor-trailer.

Listed below is the information he has provided. Place a checkmark next to each piece of information that should be relayed to the 911 dispatcher.

Answers for the training modules start on page 65.

1.  Advise driver to follow the on-scene emergency responder instructions
2.  The driver's shift is up in an hour
3.  The driver's name is Pete Long
4.  The vehicle is on the southbound side of Rte. 9 at the intersection of Main Street
5.  The vehicle is a twelve passenger van with six people on board
6.  Two passengers are in wheelchairs
7.  The tractor trailer is leaking significant amounts of fluid onto the roadway
8.  Two of the twelve passengers were en route to the social security office
9.  One passenger was thrown from his wheelchair and is lying on the floor
10.  The tractor trailer has an expired inspection sticker
11.  The tractor-trailer backed into the side of the transit vehicle
12.  The vehicle's wheelchair lift is not operating
13.  A male passenger is threatening to sue the transit agency

## MODULE 6: ACTIVITY 6.3 – SAFETY RELATED INCIDENT

Dispatchers play a pivotal role when responding to safety related incidents. Read through the items below and identify whether each of the statements listed below is true or false relating to the dispatcher's role in emergency response management.

Answers for the training modules start on page 65.

**1. Immediately notify the media and provide them with all the relevant details.**

True  False

**2. Dispatchers should support drivers and relay key information to emergency responders.**

True  False

**3. Dispatchers should direct the driver to help the passengers, even if it endangers his or her own safety.**

True  False

**4. Dispatchers should get off the line quickly so the driver can focus on the situation.**

True  False

**5. Dispatchers should work with the driver to identify and address safety hazards at the scene.**

True  False

**6. Dispatchers should determine if the driver is responsible for causing the incident.**

True  False

## MODULE 6: ACTIVITY 6.4 – SHELTER-IN-PLACE OR EVACUATE

Read each of the scenarios below. As you read, decide whether the appropriate action would be to shelter-in-place or evacuate. Place a checkmark in the appropriate box.

Answers for the training modules start on page 65.

1. During a severe thunderstorm a driver calls to report that a downed power line that has crossed the road delay him. His passengers are frightened by the sparking wires and requests permission to leave the vehicle with them.

- Shelter in place
- Evacuate

2. A driver reports that while waiting at a red light his van was rear-ended by a pick-up truck and fluids are leaking from both vehicles.

- Shelter in place
- Evacuate

3. On a cold winter night, a driver reports that her vehicle skidded on a patch of ice and hit a tree on the side of the road. She has turned the vehicle off and reports body damage on the left side of the vehicle. There are no signs of fluids leaking from the vehicle.

She reports that her passengers are okay with only a few complaining of minor injuries.

- Shelter in place
- Evacuate

## MODULE 7: FARE COLLECTION

### MODULE 7: ACTIVITY 7.1 – FARE COLLECTION PROCESS

Agencies benefit from having a set fare collection process.

Read through the items below and select the five key responses. Place them in the recommended chronological order by numbering them 1-8.

Answers for the training modules start on page 65.

1. \_\_ Fares should be collected and removed from the vehicle at the end of each work day.
2. \_\_ All parties involved in the fare collection should write their initials with the date and time of the fare count on the envelope.
3. \_\_ Dispatchers/schedulers should develop the manifest with the runs for the day including rider fares. The total fare to be collected should be calculated for each run.
4. \_\_ The sealed envelope should then be placed in a locked container.
5. \_\_ Dispatchers/schedulers should calculate estimated trip fares based on the agency's specific fares for in town trips and out-of-town trips.
6. \_\_ A minimum of two employees should count the fares. The fares should be counted in the presence of everyone who will be involved in the collection of the fares.
7. \_\_ If the fares match, the fares should then be sealed in an envelope.
8. \_\_ The counted fare should be compared to the estimated fare.

## MODULE 8: ADA COMPLIANCE

### MODULE 8: ACTIVITY 8.1– SERVICE ANIMALS

There are many myths and misconceptions about rules regarding service animals. Identify whether each of the statements listed below is true or false.

Answers for the training modules start on page 65.

**1. Service animals considered an “aggressive” breed or a breed banned by local government can be denied access to transit services.**

True  False

**2. Service are never permitted to be off leash.**

True  False

**3. Drivers are permitted to ask rider’s to identify their condition that makes them eligible for a service animal.**

True  False

**4. If a driver is allergic or afraid of dogs, they may reject service dogs from entering the vehicle they are operating.**

True  False

**5. Miniature horses may be registered as service animals.**

True  False

**6. Emotional support animals are equivalent to service animals.**

True  False

**7. Service animals are not required to wear identifying material such as vest or id tags.**

True  False

## MODULE 8: ACTIVITY 8.2– REASONS BEYOND RIDER CONTROL

Listed below is the information a rider has provided for missing an appointment. Place a checkmark next to each piece of information that qualifies as a reason beyond a rider's control for an ADA Paratransit Missed Trip.

Answers for the training modules start on page 65.

1.  Family emergency
2.  Rider's appointment ran late
3.  Rider changed their mind
4.  Medical emergency
5.  Rider's favorite television show ran over its scheduled time
6.  Rider's pet was being cute
7.  Severe weather conditions
8.  Vehicle arrived outside of pick-up time window
9.  Agency neglected to inform driver of rider's proper cancellation
10.  Rider was having a bad hair day
11.  Vehicle arrived at wrong location or entrance
12.  Rider's personal attendant called in sick

## MODULE 9: ADVICE FOR HIRING AND SUPERVISING DISPATCHERS

### MODULE 9: ACTIVITY 9.1 – FIVE STEPS OF DEVELOPING A STRONG TEAM

Write the letter of the appropriate step type next to each description. Terms may be used multiple times.

Answers for the training modules start on page 65.

- \_\_\_ 1. Drivers should be compensated appropriately, so they feel valued.
  - \_\_\_ 2. Training and technical support should be provided for dispatchers.
  - \_\_\_ 3. Internal applicants with bus driving experience should be given priority over external applicants without bus driving experience for dispatching positions.
  - \_\_\_ 4. The delegation of dispatching task should be based on experience.
  - \_\_\_ 5. Feedback should be given to dispatchers periodically.
  - \_\_\_ 6. Offering dispatcher scripts to increase consistency of information relayed to customers by dispatchers.
  - \_\_\_ 7. Job posts should thoroughly detail qualification and experience necessary to perform the tasks of a dispatcher successfully.
  - \_\_\_ 8. Utilizing technology aids in increasing customer satisfaction by enhancing the services offered by transit agencies.
- 
- A. Selective hiring
  - B. Appropriate compensation
  - C. Periodic evaluation of training materials
  - D. Efficient delegation of duties
  - E. Facilitating strong support systems
  - F. Utilizing technology

## MODULE TRAINING ACTIVITIES ANSWER KEY

### MODULE 1 ANSWERS

#### ACTIVITY 1.1 – SCHEDULER DUTIES

The correct answers are listed below:

1. C
2. D
3. A
4. D

#### ACTIVITY 1.2 – DISPATCHER DUTIES

The correct answers are listed below:

1. C
2. B
3. C
4. C

#### ACTIVITY 1.3 – A DISPATCHER’S MORNING

1. Customer Communication
2. Customer Coordination
3. Agency Coordination
4. Driver Communication
5. Route Monitoring

#### ACTIVITY 1.4 – RECORDING INFORMATION

The following should be recorded:

- Date
- Customer’s name
- Driver knocked on door
- Phone attempts to reach customer
- Location arrival/departure times
- Driver name/vehicle number
- Pick-up time

## MODULE 2 ANSWERS

#### ACTIVITY 2.1 – CREATE A DEMAND-RESPONSE SCHEDULE

The pickup/ drop off order is as follows.

Customer/ Location	Requested Pick Up Time	Appointment Time	Actual Pick Up Time	Arrival Time at Location or Customer	Actual Departure Time
<b>Drop Offs</b>					
Puetz/Dialysis Clinic	7:00 a.m.	7:30 a.m.	7:06 a.m.	7:00 a.m.	7:34 a.m.
Kroetch/ Dialysis Clinic	7:15 a.m.	7:45 a.m.	7:20 a.m.	7:30 a.m.	7:34 a.m.
Toner/Cliff Church	7:45 a.m.	8:15 a.m.	7:38 a.m.	8:00 a.m.	8:02 a.m.
Carpenter/ Senior Center	8:15 a.m.	8:45 a.m.	8:22 a.m.	8:40 a.m.	8:42 a.m.
Viereck/ County Medical Center	8:45 a.m.	9:15 a.m.	8:32 a.m.	9:00 a.m.	9:02 a.m.

#### ACTIVITY 2.2 – FIXED ROUTE SCHEDULING

The sequence of developing a fixed route schedule is as follows:

1. Trip Building
2. Blocking
3. Runcutting
4. Rostering

#### ACTIVITY 2.3 – SERVICE TYPES

The correct service type for each customer service need is listed below.

1. J – Volunteer Drivers
2. E – Subscription Service
3. G – Fixed Route Service with Point Deviation
4. B – Fixed Route Service with Route Deviation
5. F – Vanpool Service
6. C – ADA Complementary Paratransit Service
7. D – Reservation Service
8. A – Fixed Route Service
9. H – Taxicab Service
10. I – Carpool Service

## ACTIVITY 2.4 - CALCULATING TRAVEL TIME

The correct answers are listed below:

Situation 1: C. 20 minutes

Situation 2: A. 10 more minutes

Situation 3: D. 24 minutes

## MODULE 3 ANSWERS

### ACTIVITY 3.1 – IMPLEMENTING TECHNOLOGY

The answers for each statement are listed below:

1. False. Often the implementation of new technology requires additional staff to operate and maintain it, as well as resources to manage and analyze new data generated.
2. True. Training is critical in realizing the potential of new technologies.
3. True. It is important that all facets of the organization that will be directly or indirectly impacted by the project be represented on the project team and be involved in all phases of the project.
4. False. Technology for technology sake is often a big drain on agency resources. Technology should only be implemented if it meets specific agency needs.
5. False. How an agency will maintain a new technology is often overlooked. Frequently it requires technical competencies that current maintenance or information technology employees do not possess.

## MODULE 4 ANSWERS

### ACTIVITY 4.1 – CUSTOMER SERVICE AWARENESS

The following behaviors will help promote a friendly work environment:

Answer 1 - You wait patiently while your customer gives you information to schedule the trip. You know she takes pride in being independent.

Answer 4 - You answer the phone with a warm, welcoming tone.

Answer 5 - You speak at a rate and volume that is easily understood by customers.

Answer 8 - You actively listen to customers and take notes while they are speaking.

Answer 10 - You end all calls with a positive closing.

## ACTIVITY 4.2 – SEND A MESSAGE

The statements that demonstrate effective communication are:

Answer 2 - In order to inform a customer of a service suspension, the scheduler provides the customer a typed, formal letter indicating suspension details and appeal information.

Answer 3 - A dispatcher notices a wrong address on the manifest, and jots a note to the scheduler with the customer's name and correct address. He also mentions it when he sees her.

Answer 5 - When a driver calls to report smoke coming from the engine compartment, the dispatcher instructs the driver to pull over immediately and evacuate the vehicle.

### ACTIVITY 4.3 – FILTER THE CALL

The following information will help you resolve the problem:

- This is Mr. Morales
- Last Tuesday, I was supposed to be picked up at the Longwood Market
- The bus was late
- I called the dispatcher
- She said the bus would arrive in fifteen minutes
- I waited for one hour
- I need to be able to shop every week

### ACTIVITY 4.4 – CHECK YOUR PROFESSIONALISM

The following transcripts best demonstrate professional customer service skills:

Dispatcher: Scenario B

Scheduler: Scenario A

### ACTIVITY 4.5 – CLEAR COMMUNICATION

The correct answer is A

## MODULE 5 ANSWERS

### ACTIVITY 5.1 – DEALING WITH DIFFICULT PEOPLE

1. Response B
2. Response A

### ACTIVITY 5.2 – CALL TYPES

The correct answers are listed below:

1. C
2. A
3. D
4. B
5. C
6. E
7. C
8. E

### ACTIVITY 5.3 – INFORMATION FOR QUICK REFERENCE

The following information should be easily accessible to dispatchers during calls:

- Service hours
- Basic agency policy questions
- Agency service area
- Phone numbers for taxi companies and other local transit providers
- Agency fleet information
- Fare amounts

## MODULE 6 ANSWERS

### ACTIVITY 6.1 – RESPONDING TO EMERGENCY SITUATION

The correct responder for each action is listed below.

1. Emergency Responder
2. Emergency Responder
3. Emergency Responder
4. 911 Dispatcher
5. Transit Dispatcher
6. Transit Dispatchers
7. Driver
8. Transit Dispatcher

### ACTIVITY 6.2 – COMMUNICATIONS

The following information should be relayed to the 911 dispatcher:

- The driver's name is Pete Long
- The vehicle is on the southbound side of Route 9 at the intersection of Main Street
- The vehicle is a twelve passenger van with six people on board
- Two passengers are in wheelchairs
- The tractor trailer is leaking significant amounts of fluid onto the roadway
- One passenger was thrown from his wheelchair and is lying on the floor
- The tractor-trailer backed into the side of the transit vehicle
- The vehicle's wheelchair lift is not operating

### ACTIVITY 6.3 – SAFETY RELATED INCIDENT

1. False. Notifying the media of safety related incidents should not be a main priority while responding to the incident.
2. True. Dispatchers serve as the main communication line between drivers and emergency responders.
3. False. Dispatchers should not encourage drivers to put their safety at risk.
4. False. Dispatchers should ensure they obtain all relevant information to pass on to emergency responders and maintain in constant communication with drivers.
5. True. Drivers may be panicking during a safety related incident therefore dispatchers should aid in identifying safety hazards to best identify it is safest to shelter-in-place or evacuate.
6. False. Dispatchers should focus on providing guidance to drivers, not determining who's to blame for the incident.

### ACTIVITY 6.4 – SHELTER-IN-PLACE OR EVACUATE

The following are the correct responses for each scenario:

1. shelter-in-place
2. evacuate
3. shelter-in-place

## MODULE 7 ANSWERS

### ACTIVITY 7.1 – FARE COLLECTION PROCESS

The correct chronological order for the recommended fare collection process is as follows:

1. Dispatchers/schedulers should develop the manifest with the runs for the day including rider fares. The total fare to be collected should be calculated for each run.
2. Dispatchers/schedulers should calculate estimated trip fares based on the agency's specific fares for in town trips and out-of-town trips.
3. Fares should be collected and removed from the vehicle at the end of each work day.
4. A minimum of two employees should count the fares. The fares should be counted in the presence of everyone who will be involved in the collection of the fares.
5. The counted fare should be compared to the estimated fare.
6. If the fares match, the fares should then be sealed in an envelope.
7. All parties involved in the fare collection should write their initials with the date and time of the fare count on the envelope.
8. The sealed envelope should then be placed in a locked container.

## MODULE 8 ANSWERS

### ACTIVITY 8.1 – SERVICE ANIMALS

The answers for each statement are listed below:

1. False. A city ban on specific breeds does not apply to service animals.
2. False. Service animals are permitted to be off leash if it is required for them to perform their assigned task, but must be put back on leash immediately after the task is completed.
3. False. Drivers can only ask if the animal is a service animal and what task the animal is trained to perform.

4. False. Allergy or fear of animals does not permit an agency to disregard ADA regulations.
5. True. The U.S. Department of Justice protects dogs and miniature horses as service animals and the USDOT protects all animals that perform as service animals.
6. False. Emotional support animals are not offered the same protections as service animals.
7. True. ADA does not require service animals to wear identifying material.

### ACTIVITY 8.2– REASONS BEYOND RIDER CONTROL

The following items are considered reasons beyond a rider's control:

- Family emergency
- Rider's appointment ran late
- Medical emergency
- Severe weather conditions
- Vehicles arrived outside of pickup time window
- Agency neglected to inform driver of rider's proper cancellation
- Vehicle arrived at wrong location or entrance
- Rider's personal attendant called in sick

## MODULE 9 ANSWERS

### ACTIVITY 9.1 – FIVE STEPS OF DEVELOPING A STRONG TEAM

The correct answers are listed below:

1. B
2. E
3. A
4. D
5. C
6. E
7. A
8. F

## GLOSSARY

**Allowance:** The amount of time on the clock before a driver starts driving that can be charged

**Blocking:** The process of developing assignments for each vehicle in a single workday

**Blocking sheets:** The visual overview of the blocks that need to be individually staffed

**Block summary recap:** Summary information about block pull-in/pull-out location and times

**Computer Aided Dispatch (CAD):** is a method of utilizing computers to dispatch transit vehicles. CAD can be used to send and receive messages and/or store data.

**Automatic Vehicle Location (AVL):** utilizes computers and Global Positioning Systems (GPS) to track and dispatch transit vehicles.

**Complaint:** A call focusing on a customer's dissatisfaction with the service they received. There are two categories of complaints: minor and major. A minor complaint call would consist of a rider reporting minor annoyances such as a vehicle not meeting their standard of cleanliness or the vehicle being an unpleasant temperature. A major complaint call would consist of a rider reporting inappropriate behavior they witnessed the driver exhibit such as not complying with agency policy, driving recklessly, and not obeying the speed limit.

**Curb-to-curb service:** The transit vehicle picks up and discharges passengers at the curb or driveway in front of their home or destination.

**Cycle time:** A measure of the total time it takes a bus to make a round trip on a route.

**Deadhead:** The miles and hours that a vehicle travels when out of revenue service. Deadhead includes leaving or returning to the garage or yard facility, changing routes, and when there is no expectation of carrying revenue passengers. However, deadhead does not include charter service, school bus service, operator training, and maintenance training.

**Demand-response service:** A transit mode comprised of passenger cars, vans or small buses operating in response to calls from customers or their agents to the transit agency, which then dispatches a vehicle to pick up the customers and transport them to their destinations.

**Dispatcher:** Someone who coordinates the movement of vehicles regardless of whether it is their full time job or part of another position.

**Door hangers:** A written notice hung on the door indicating when the vehicle had arrived and left, that the customer is a no-show, and who they can contact for future trips.

**Door-through-door service:** A form of demand-response service where the driver provides assistance within the "door" at the origin or destination of a passenger's pickup and drop off location.

**Door-to-door service:** A form of demand-response service which includes passenger assistance between the vehicle and outside door of a person's home or other destination. This is a higher level of service than curb-to-curb, yet not as specialized as door-through-door service.

**Dwell time:** The elapsed time from when a driver arrives to pick up a customer and leaves the pick-up location, as well as the elapsed time from when the driver arrives at the drop-off location and leaves after dropping off the customer.

**Fares:** The price charge for transit service.

**Fixed route service:** Services provided on a repetitive, fixed schedule basis along a specific route with vehicles stopping to pick up and deliver passengers to specific locations; each fixed route trip serves the same origins and destinations, such as rail and bus; unlike demand-response and vanpool services.

**Fixed route service with route deviation:** A service provided in which bus may deviate from the route alignment to serve destinations within a prescribed distance (e.g.,  $\frac{3}{4}$  mile) of the route.

**Fixed route service with point deviation:** A service provided in which all origins and destinations within a corridor, are defined by a prescribed distance from a street (e.g., ¼ mile), making scheduled stops at mandatory time points along the corridor on a predetermined schedule.

**Grievances:** Complaints that are potentially based on discrimination.

**Headway:** The time interval between vehicles moving in the same direction on a particular route.

**Information calls:** A call that focuses on obtaining basic information such as phone numbers, service hours and areas of service.

**Interlining:** Interlining refers to a fixed-route vehicle switching from one route to another during a service day. Interlining is useful in reducing long layover on recovery times, eliminates end of line looping, and reduces the need for customers to transfer from one vehicle to another.

**Layover location:** The layover location is where the vehicle is stopped during layover. The location is usually at the end of the line.

**Layover/recovery time:** Layover/Recovery time refers to the hours scheduled at the end of the route before the departure time of the next trip. This time is scheduled for two reasons:

1. To provide time for the vehicle operator to take a break (layover)
2. To provide time to get back on schedule before the next trip departs if the trip arrives late at the end of the route (recovery).

**Lift:** A mechanical device, typically a lift or ramp that accommodates mobility devices without the use of stairs. Lifts must accommodate at least 600 pounds as per the law.

**Make-up:** The payment for time not actually worked by an operator in order that the total paid time for a run is equal to a minimum daily or weekly guarantee. For example, a run that totals 7:50 including all platform and report and turn-in allowances will be granted ten minutes of make-up time so that the total pay equals eight hours for the day.

**Manifests:** A driver's daily log of all trips that will be provided on their run.

**Mobility device:** A device that improves the mobility of people with mobility disabilities.

**Negotiated pick up:** The pick-up time that is offered by the agency and agreed to by the customer after a request has been placed and availability has been checked.

**On-time performance window:** The maximum change in time between the agreed upon and scheduled pick-up times that should be made without notification of the customer.

**Personal Care Attendant (PCA):** Someone designated or employed specifically to help an ADA-eligible individual meet his or her personal needs.

**Platform time:** The total time a bus is in operation.

**Point check:** Checking the actual time of a route based on specific points along the route.

**Scheduler:** Someone who coordinates the movement of vehicles regardless of whether it is their full time job or part of another position.

**School Tripper Service:** The additional capacity that an agency adds to an existing public transit route to meet the demands of traveling students

**Seating capacity:** The maximum amount of seating available on a vehicle at any given time.

**Service contractors:** An outside party hired to provide transit service.

**Slack time:** The time added to the schedule when the vehicle is not in revenue service.

**Split runs:** Two or three blocks for a single driver with break time between the blocks.

**Spread penalty:** Spread penalty is an amount of pay granted to an operator for all minutes worked over a specified spread time.

**Slack time:** The available time in a vehicle schedule when the vehicle is not in revenue service. Sometimes slack time is built into a schedule to accommodate anticipated additions or changes.

**Spread time:** Spread time is generally defined as the total elapsed time between the first report time and the final turn-in time of a run. Spread time typically applies to split runs and, depending on the agency, varies between 10 and 14 hours in duration.

**Spread Penalty:** Spread penalty is an amount of pay granted to an operator for all minutes worked over a specified spread time.

**Straight runs:** A single block continuous work for approximately 8 to 10 hours.

**Relief locations:** Locations on routes where drivers can use the restroom and get refreshments. Time is built into the schedule at relief locations.

**Report allowance:** The report allowance is an amount of time paid to an operator, starting when the operator reports for duty and ending when the pull-out time begins.

**Revenue hours:** The total time a bus spends servicing riders. It can be calculated by platform time minus deadhead and layover.

**Revenue service:** The time when a vehicle is available to the general public and there is an expectation of carrying passengers. These passengers either directly pay fares, are subsidized by public policy, or provide payment through some contractual arrangement. Vehicles operated in fare free service are considered in revenue service. Revenue service includes layover and recovery time. Revenue service excludes time when vehicle is not in service (deadhead), vehicle maintenance testing, school bus service, and charter service.

**Ride check:** Checking the time of a route by riding during specific times of the day to observe actual conditions.

**Ridership call:** A call that focuses on questions regarding the rider's account.

**Rostering:** The process of grouping daily driver runs into weekly packages.

**Run:** A driver's daily scheduled trips.

**Runcut:** Runcutting is the process of developing driver assignments. The assignments or "runs" are assembled, or "cut" from the block.

**Run type and percentages:** Many agencies are required to develop a certain percentage of straight runs and/or restrict the number of split runs. Usually, the restriction on split runs defines a certain percentage of splits that can exceed given levels of spread times. For example, an agency may restrict run type and percentages as follows:

- 50% of all runs must be straight.
- Of the remaining 50%, 1/3 must be completed within 12:00 spread, 1/3 must be completed within 12:30 spread, and no more than 1/3 must be completed within 13:00 spread.

**Service animals:** Animals that are individually trained to perform tasks for people with disabilities- such as guiding people who are blind or who have low vision, alerting people who are deaf, pulling wheelchairs, alerting a person who is having a seizure, or performing other special tasks. Service animals are working animals, not pets.

**Trip building:** The process of creating the master service schedule.

**Turn-in allowance:** The turn-in allowance is paid time for the operator to report to the dispatcher at the conclusion of the run (when pull-in time ends) for turning in transfers, receipts, supplies, reports and to tend to any other required duties after leaving the vehicle.

**Volunteer drivers:** Individuals who drive vehicles to transport passengers for the transit agency, but are not employees of the transit agency and are not compensated for their labor.



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