Introducing:
Dispatching and Scheduling Training for Rural Transit Systems

November 4. 2021. 2:00-3:00 PM ET

National RTAP
Rural Transit Assistance Program

FTA U.S. Department of Transportation
Federal Transit Administration

Zoom Webinar Information

- All participants have been placed on mute.
- Use the chat box to get help using Zoom webinar.
- Use the Q&A box to ask questions.
- We will respond to questions during the Q&A portion of the webinar.
- The recording and slides will be posted to the National RTAP website.
- Please fill out the brief survey after the webinar.



Agenda

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  - On-Boarding and Training
  - Setting up a Workspace
  - Teamwork
  - Technology

Introduction



Speaker Introductions



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National Rural Transit Assistance Program

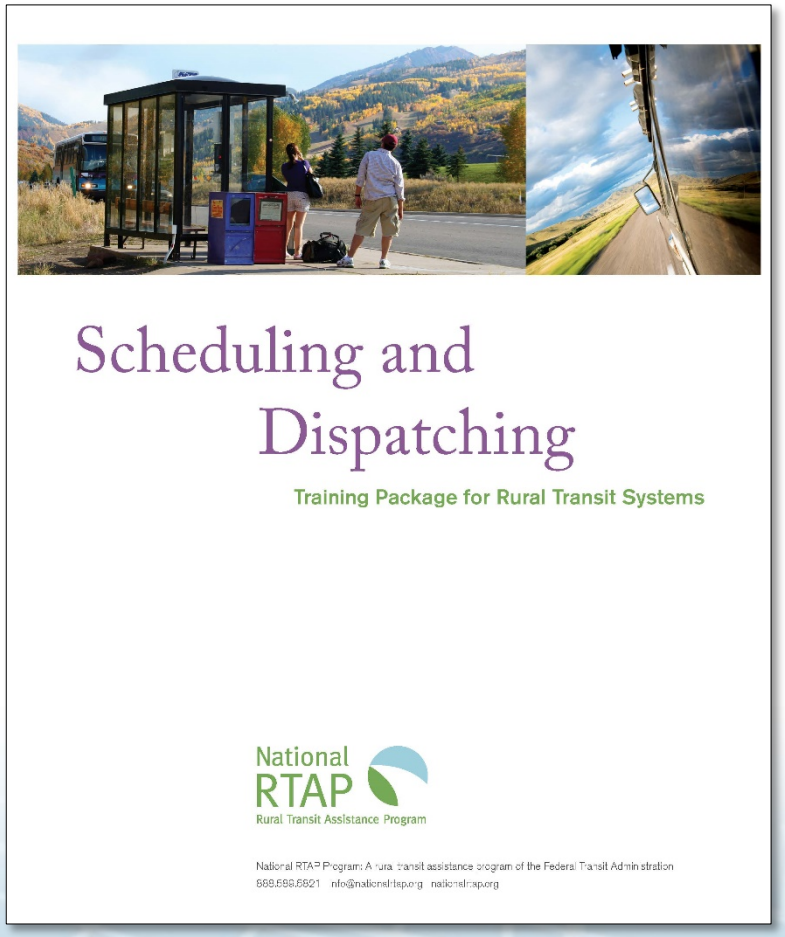
- Technical assistance center funded by FTA through the Section 5311 Program
- Provides free training materials and technical assistance to rural and tribal transit providers and state RTAP programs
- Review Board – State DOT and rural and tribal transit agency staff
- Learn more at www.nationalrtap.org or call 888-589-6821





Project Background

- Original Scheduling and Dispatching Course was developed in 2009
- This update is designed to offer a general education training program for new dispatchers and schedulers
- It could also be used as a refresher training for more seasoned staff



Acknowledgments

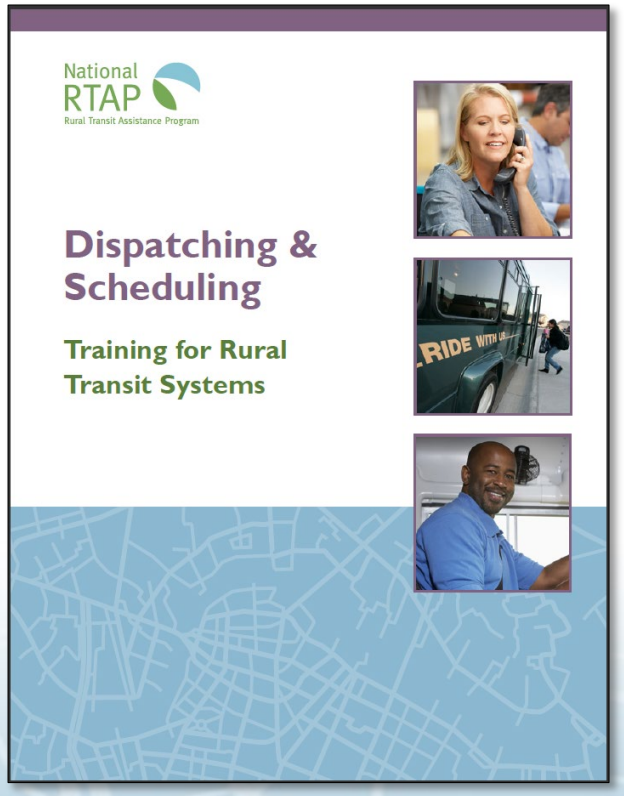
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About the Training



Components

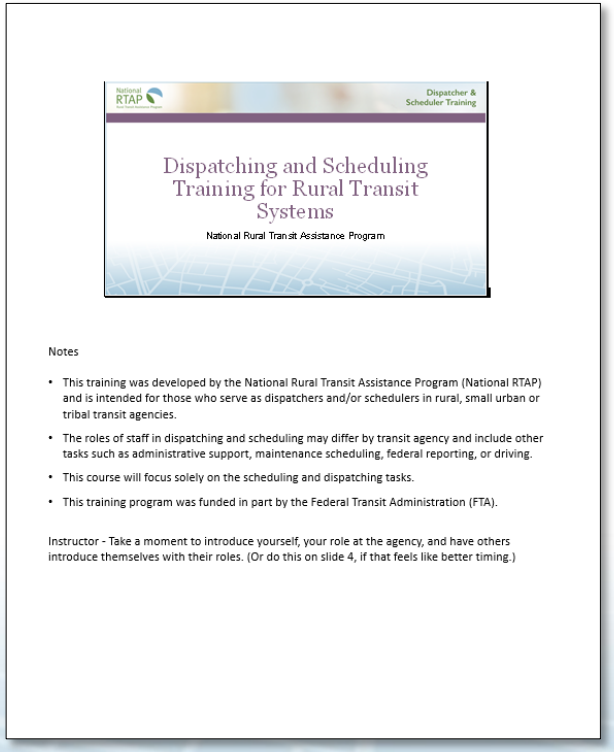
Training Manual



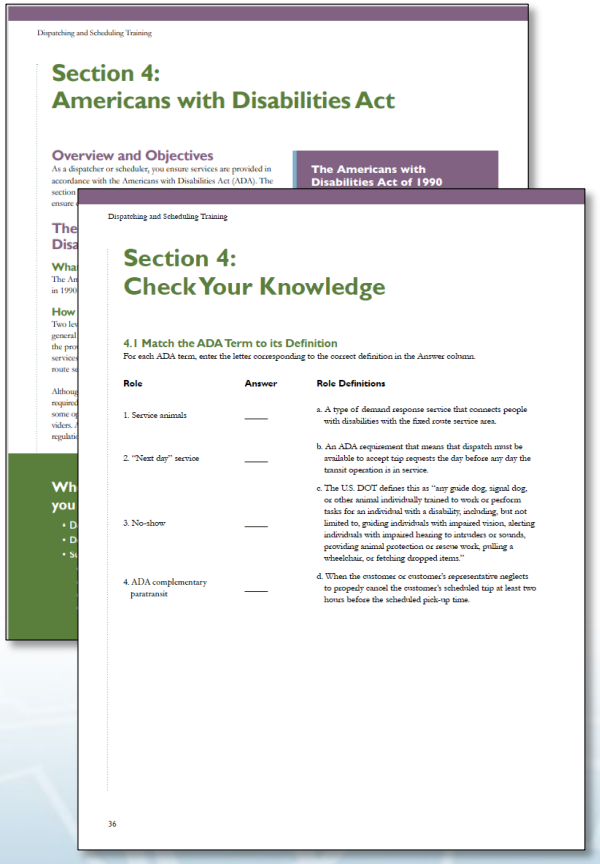
eLearning Course

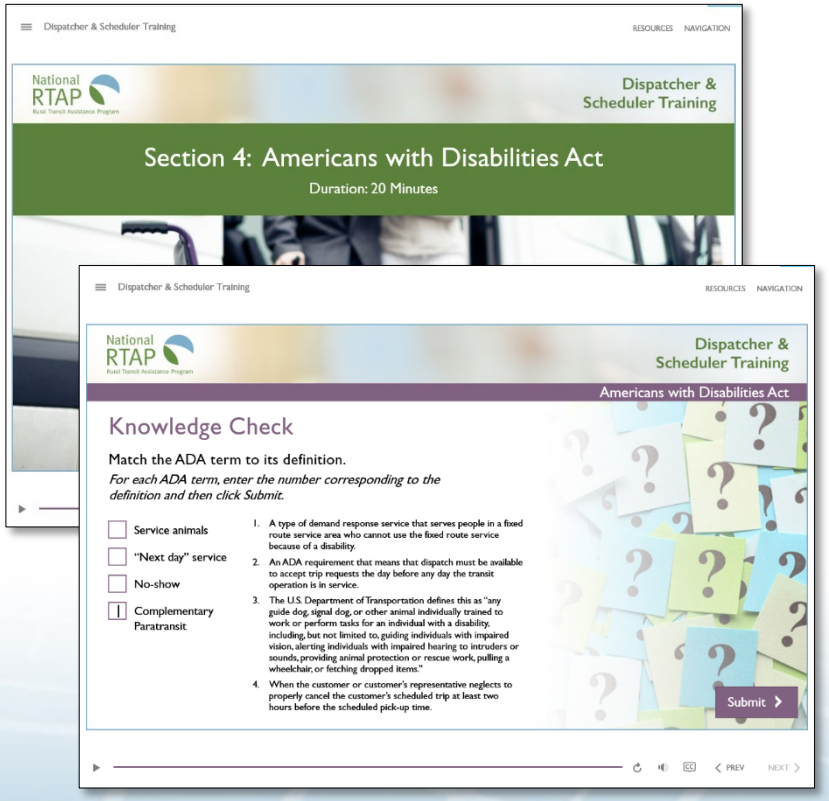


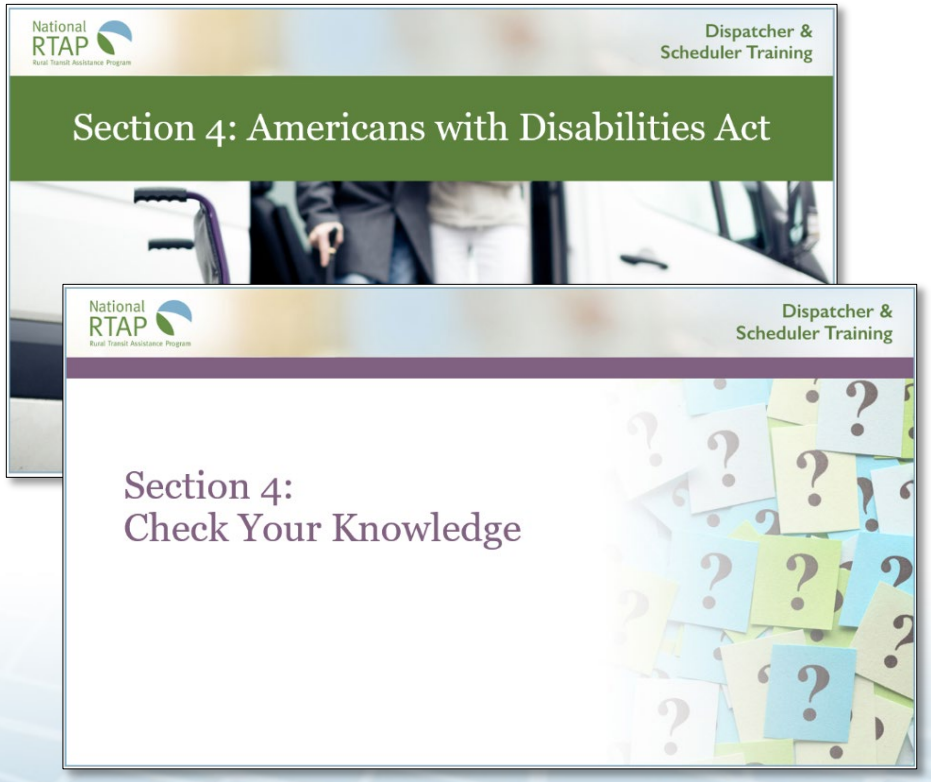
Instructor-Led Training Materials



Equivalent Content in All Formats







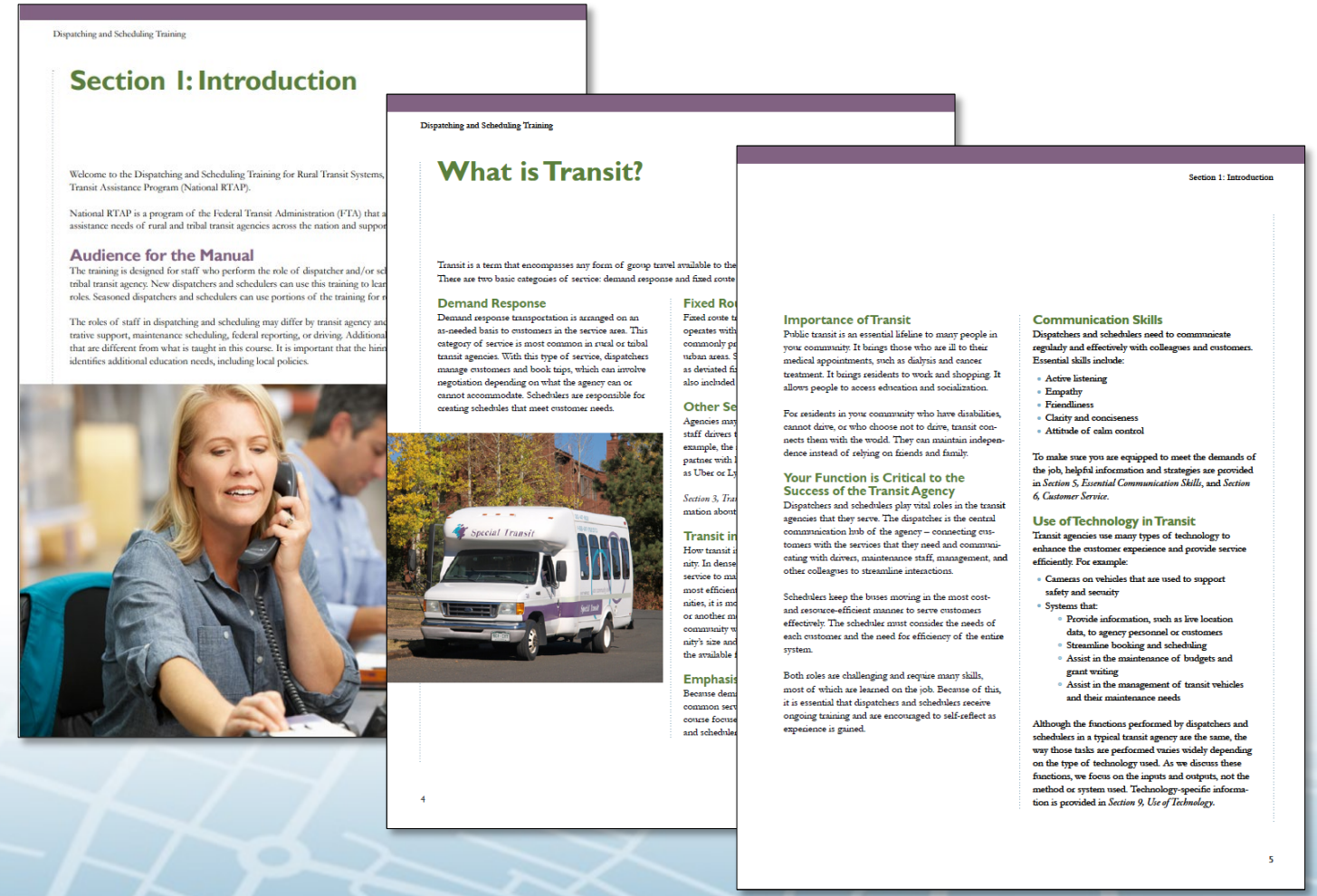
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Section 2 – Working in a Transit Environment
Section 3 – Transit Service Types
Section 4 – Americans with Disabilities Act
Section 5 – Essential Communication Skills
Section 6 – Customer Service
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Dispatching and Scheduling Training

Section 1: Introduction

Welcome to the Dispatching and Scheduling Training for Rural Transit Systems, Transit Assistance Program (National RTAP).

National RTAP is a program of the Federal Transit Administration (FTA) that a assistance needs of rural and tribal transit agencies across the nation and suppo

Audience for the Manual

The training is designed for staff who perform the role of dispatcher and/or sc tribal transit agency. New dispatchers and schedulers can use this training to lear roles. Seasoned dispatchers and schedulers can use portions of the training for r

The roles of staff in dispatching and scheduling may differ by transit agency an trative support, maintenance scheduling, federal reporting, or driving. Additiona that are different from what is taught in this course. It is important that the hirin identifies additional education needs, including local policies.

Dispatching and Scheduling Training

What is Transit?

Transit is a term that encompasses any form of group travel available to the There are two basic categories of service: demand response and fixed route

Demand Response

Demand response transportation is arranged on an as-needed basis to customers in the service area. This category of service is most common in rural or tribal transit agencies. With this type of service, dispatchers manage customers and book trips, which can involve negotiation depending on what the agency can or cannot accommodate. Schedulers are responsible for creating schedules that meet customer needs.

Fixed Ro

Fixed route t operates with commonly pa urban areas. S as deviated fi also included

Other Se

Agencies may staff drivers t example, the partner with as Uber or Ly

Section 3, Tra mation about

Transit in

How transit i nity. In dense service to ma most efficient nities, it is mo or another m community w nity's size and the available

Emphasi

Because dem common serv course focuse and schedule

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Section 1: Introduction

Importance of Transit

Public transit is an essential lifeline to many people in your community. It brings those who are ill to their medical appointments, such as dialysis and cancer treatment. It brings residents to work and shopping. It allows people to access education and socialization.

For residents in your community who have disabilities, cannot drive, or who choose not to drive, transit connects them with the world. They can maintain independence instead of relying on friends and family.

Your Function is Critical to the Success of the Transit Agency

Dispatchers and schedulers play vital roles in the transit agencies that they serve. The dispatcher is the central communication hub of the agency – connecting customers with the services that they need and communicating with drivers, maintenance staff, management, and other colleagues to streamline interactions.

Schedulers keep the buses moving in the most cost- and resource-efficient manner to serve customers effectively. The scheduler must consider the needs of each customer and the need for efficiency of the entire system.

Both roles are challenging and require many skills, most of which are learned on the job. Because of this, it is essential that dispatchers and schedulers receive ongoing training and are encouraged to self-reflect as experience is gained.

Communication Skills

Dispatchers and schedulers need to communicate regularly and effectively with colleagues and customers. Essential skills include:

- Active listening
- Empathy
- Friendliness
- Clarity and conciseness
- Attitude of calm control

To make sure you are equipped to meet the demands of the job, helpful information and strategies are provided in *Section 5, Essential Communication Skills*, and *Section 6, Customer Service*.

Use of Technology in Transit

Transit agencies use many types of technology to enhance the customer experience and provide service efficiently. For example:

- Cameras on vehicles that are used to support safety and security
- Systems that:
  - Provide information, such as live location data, to agency personnel or customers
  - Streamline booking and scheduling
  - Assist in the maintenance of budgets and grant writing
  - Assist in the management of transit vehicles and their maintenance needs

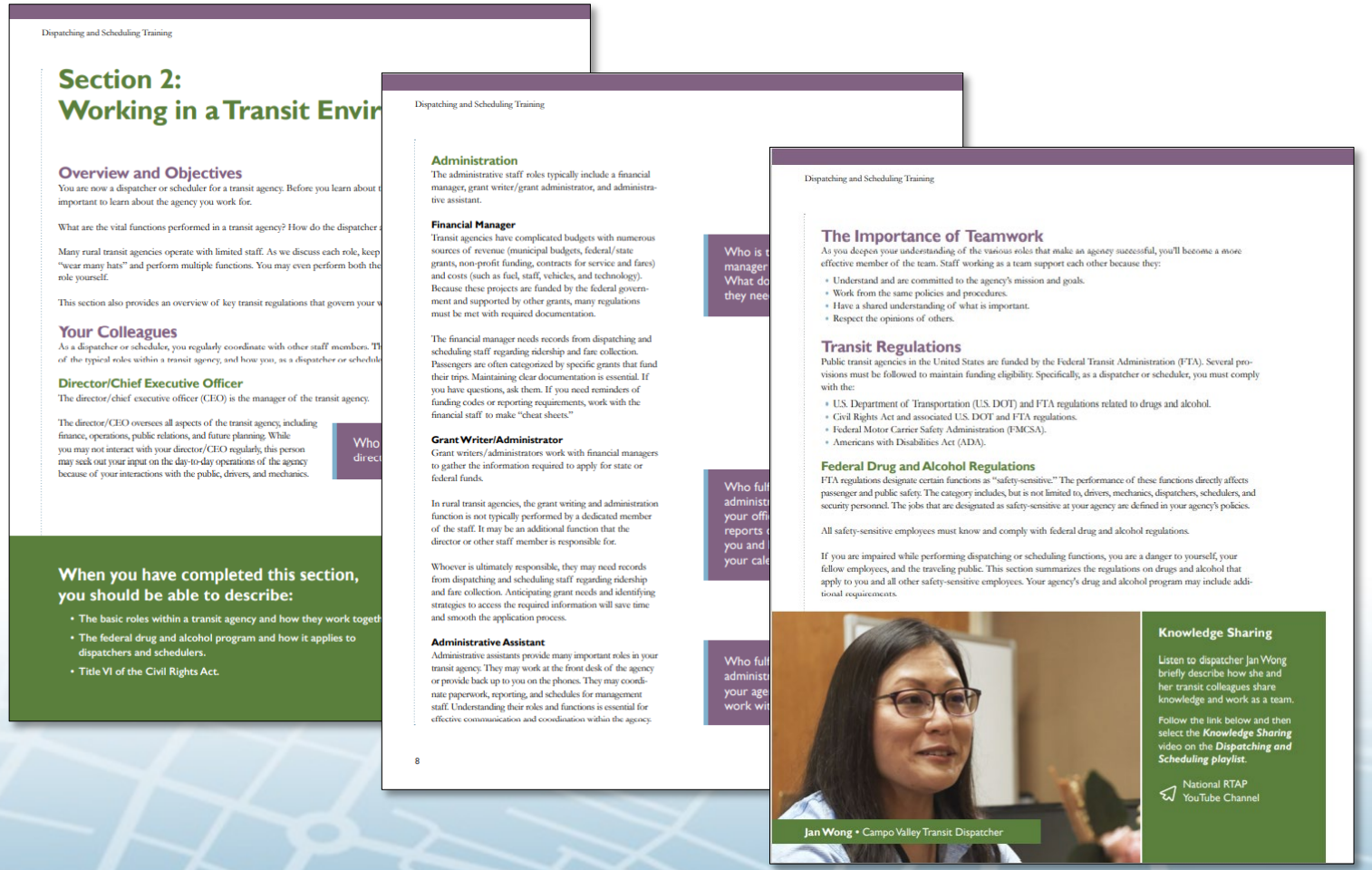
Although the functions performed by dispatchers and schedulers in a typical transit agency are the same, the way those tasks are performed varies widely depending on the type of technology used. As we discuss these functions, we focus on the inputs and outputs, not the method or system used. Technology-specific information is provided in *Section 9, Use of Technology*.

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Dispatching and Scheduling Training

Section 3: Transit Service Types

Overview and Objectives

Rural transit agencies offer a range of services depending on the needs of the
funding. In this section, you learn about the details of each service.

Demand Response Transportation

Demand response transportation refers to transportation that is
schedule. Rather, the trips are based on the needs of the custom

In general, a scheduled trip is initiated by a customer contacting the dispatcher
request may be made by someone calling on the customer's behalf). The dispat
scheduler. The scheduler develops the drivers' schedules for the day to accomm

Section 7, Role of the Dispatcher and Section 8, Role of the Scheduler provide detail

Types of Service Requests

Rural transit agencies typically deliver demand response service by reservation

- **Reservation service**
  Reservation service requires customers to call ahead for every trip they need
  time. Reservations are typically made in advance, but some agencies allow s
- **Subscription service**
  Subscription service allows customers to schedule the trips they take regular
  customer has a medical appointment every Friday at noon, they can create a
  they don't need to make a reservation for each trip.

When you have completed this section, you should be able to:

- Describe the major types of demand response service, includi
  vehicles used and the role of the driver.
- Define fixed route transportation.
- Describe how deviated fixed route transportation differs from st

Section 3: Transit Service Types

Service Types

There are three basic types of demand response service.

- **Many origins, many destinations:** This is the most flexible service. Typically, each customer is picked up at home, dropped off at a requested location, and then later returned home from that location. This is the most common type of demand response service provided by rural transit agencies.
- **Many origins, one destination:** This option can be used to provide access to a medical center, social service provider, shopping center, public transit hub, or other common destination. Sometimes it's provided by contract with the destination entity. Typically, each customer is picked up at home, dropped off at a common destination, and then later returned home from the common location.
- **One origin, one destination:** This option is often specific to social service transportation. For example, customers are picked up at a group home, dropped off at a sheltered workplace, and later returned to the group home.

Depending on the needs of the community, agencies may offer variations

ADA Complementary Paratransit

Another type of demand response service is ADA complementary paratra
the Americans with Disabilities Act (ADA). We discuss the specifics of thi
Disabilities Act.

Dispatching and Scheduling Training

Service Type Summary Table

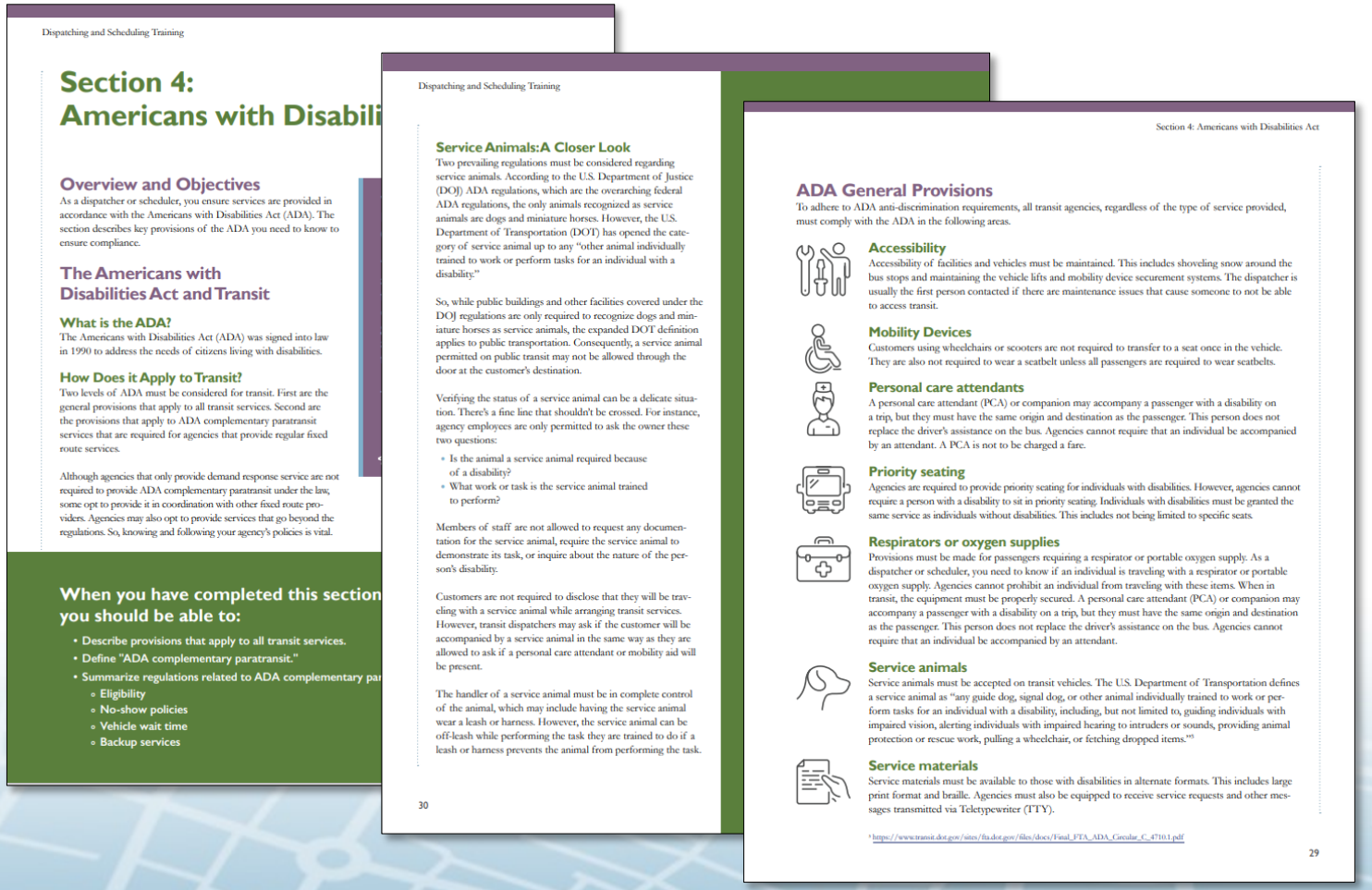
Primary Service Types	Agency Provided?	Fixed Route?	Fixed Schedule?	Vehicles Used?	Primary Role of the Driver?	Reservation Needed?
Demand Response	Generally	No	No	Sedans, Vans, Cutaways	Drive, Collect Fares, Curb-to-Curb or Door-to-Door Service	Yes
Fixed Route	Generally	Yes	Yes	Cutaways, Transit Buses	Drive, Collect Fares	No
Deviated Fixed Route	Generally	Yes	Yes, with Deviations	Cutaways, Transit Buses	Drive, Collect Fares, Curb-to-Curb or Door-to-Door Service for Deviated Routes	Yes, for Deviations
Commuter Transit	Generally	Yes	Yes	Cutaways, Transit Buses, Commuter Bus	Drive, Collect Fares	No
Vanpool	Sometimes	No	No	Van	Coordinate Service	Yes
Carpool	Matching Services Sometimes Provided	No	No	Personal Vehicle	Alternates between Passengers	Yes
Volunteer Driver	No – May Coordinate	No	No	Personal Vehicle	Drive, Through-the-Door Service	Yes
Taxicab / Ride-hailing	No – May Coordinate	No	No	Taxicab or Personal Vehicle	Drive, Collect Fares	Yes

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Dispatching and Scheduling Training

Section 4: Americans with Disabili

Overview and Objectives

As a dispatcher or scheduler, you ensure services are provided in accordance with the Americans with Disabilities Act (ADA). The section describes key provisions of the ADA you need to know to ensure compliance.

The Americans with Disabilities Act and Transit

What is the ADA?

The Americans with Disabilities Act (ADA) was signed into law in 1990 to address the needs of citizens living with disabilities.

How Does it Apply to Transit?

Two levels of ADA must be considered for transit. First are the general provisions that apply to all transit services. Second are the provisions that apply to ADA complementary paratransit services that are required for agencies that provide regular fixed route services.

Although agencies that only provide demand response service are not required to provide ADA complementary paratransit under the law, some opt to provide it in coordination with other fixed route providers. Agencies may also opt to provide services that go beyond the regulations. So, knowing and following your agency's policies is vital.

When you have completed this section you should be able to:

- Describe provisions that apply to all transit services.
- Define "ADA complementary paratransit."
- Summarize regulations related to ADA complementary pa
  - Eligibility
  - No-show policies
  - Vehicle wait time
  - Backup services

Dispatching and Scheduling Training

Service Animals: A Closer Look

Two prevailing regulations must be considered regarding service animals. According to the U.S. Department of Justice (DOJ) ADA regulations, which are the overarching federal ADA regulations, the only animals recognized as service animals are dogs and miniature horses. However, the U.S. Department of Transportation (DOT) has opened the category of service animal up to any "other animal individually trained to work or perform tasks for an individual with a disability."

So, while public buildings and other facilities covered under the DOJ regulations are only required to recognize dogs and miniature horses as service animals, the expanded DOT definition applies to public transportation. Consequently, a service animal permitted on public transit may not be allowed through the door at the customer's destination.

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

- Is the animal a service animal required because of a disability?
- What work or task is the service animal trained to perform?

Members of staff are not allowed to request any documentation for the service animal, require the service animal to demonstrate its task, or inquire about the nature of the person's disability.

Customers are not required to disclose that they will be traveling with a service animal while arranging transit services. However, transit dispatchers may ask if the customer will be accompanied by a service animal in the same way as they are allowed to ask if a personal care attendant or mobility aid will be present.

The handler of a service animal must be in complete control of the animal, which may include having the service animal wear a leash or harness. However, the service animal can be off-leash while performing the task they are trained to do if a leash or harness prevents the animal from performing the task.

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Section 4: Americans with Disabilities Act

ADA General Provisions

To adhere to ADA anti-discrimination requirements, all transit agencies, regardless of the type of service provided, must comply with the ADA in the following areas.

Accessibility

Accessibility of facilities and vehicles must be maintained. This includes shoveling snow around the bus stops and maintaining the vehicle lifts and mobility device securement systems. The dispatcher is usually the first person contacted if there are maintenance issues that cause someone to not be able to access transit.

Mobility Devices

Customers using wheelchairs or scooters are not required to transfer to a seat once in the vehicle. They are also not required to wear a seatbelt unless all passengers are required to wear seatbelts.

Personal care attendants

A personal care attendant (PCA) or companion may accompany a passenger with a disability on a trip, but they must have the same origin and destination as the passenger. This person does not replace the driver's assistance on the bus. Agencies cannot require that an individual be accompanied by an attendant. A PCA is not to be charged a fare.

Priority seating

Agencies are required to provide priority seating for individuals with disabilities. However, agencies cannot require a person with a disability to sit in priority seating. Individuals with disabilities must be granted the same service as individuals without disabilities. This includes not being limited to specific seats.

Respirators or oxygen supplies

Provisions must be made for passengers requiring a respirator or portable oxygen supply. As a dispatcher or scheduler, you need to know if an individual is traveling with a respirator or portable oxygen supply. Agencies cannot prohibit an individual from traveling with these items. When in transit, the equipment must be properly secured. A personal care attendant (PCA) or companion may accompany a passenger with a disability on a trip, but they must have the same origin and destination as the passenger. This person does not replace the driver's assistance on the bus. Agencies cannot require that an individual be accompanied by an attendant.

Service animals

Service animals must be accepted on transit vehicles. The U.S. Department of Transportation defines 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."[5]

Service materials

Service materials must be available to those with disabilities in alternate formats. This includes large print format and braille. Agencies must also be equipped to receive service requests and other messages transmitted via Teletypewriter (TTY).

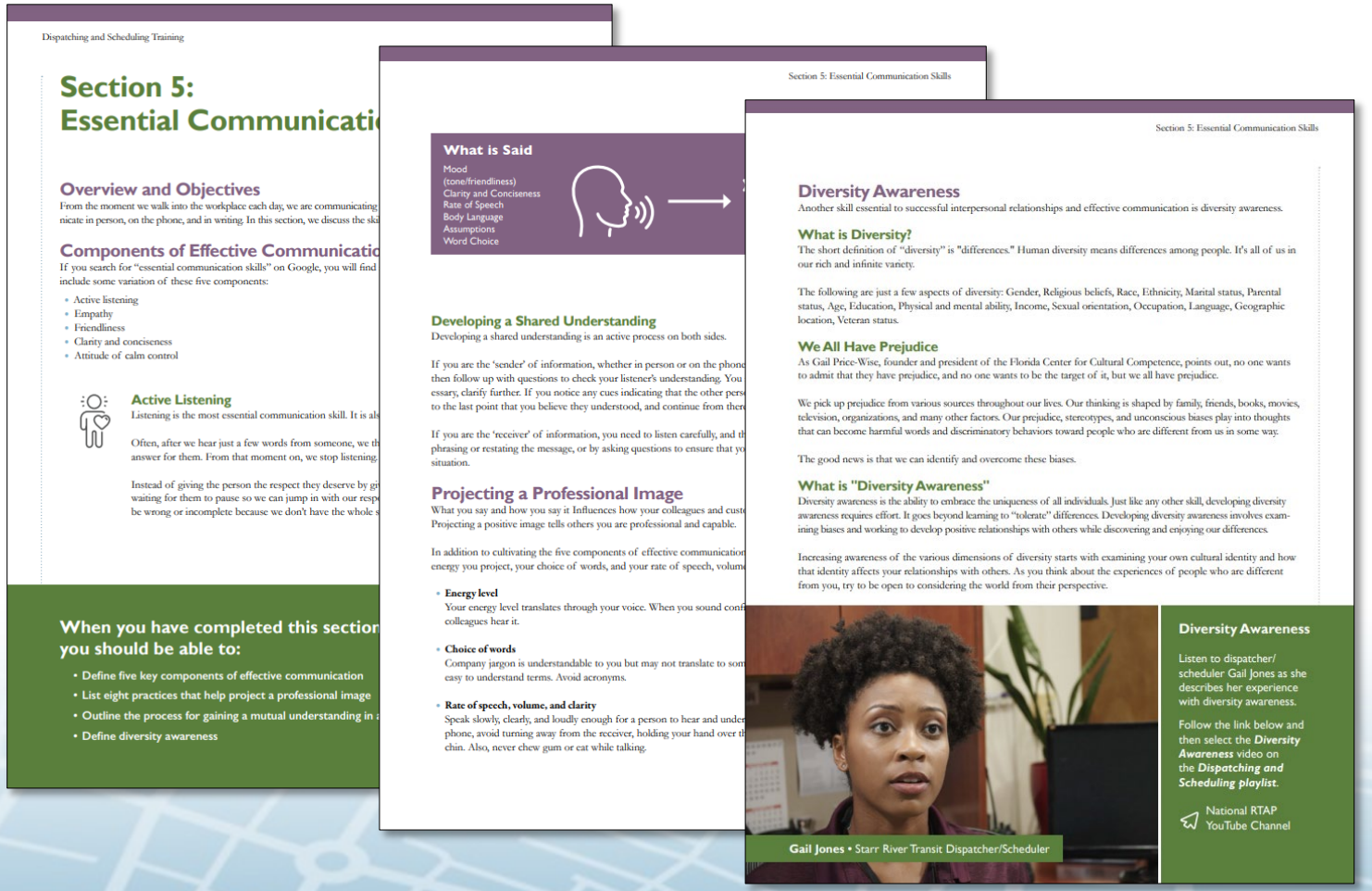
[5] https://www.transit.dot.gov/sites/fta.dot.gov/files/docs/Final_FTA_ADA_Circular_C_4710.1.pdf

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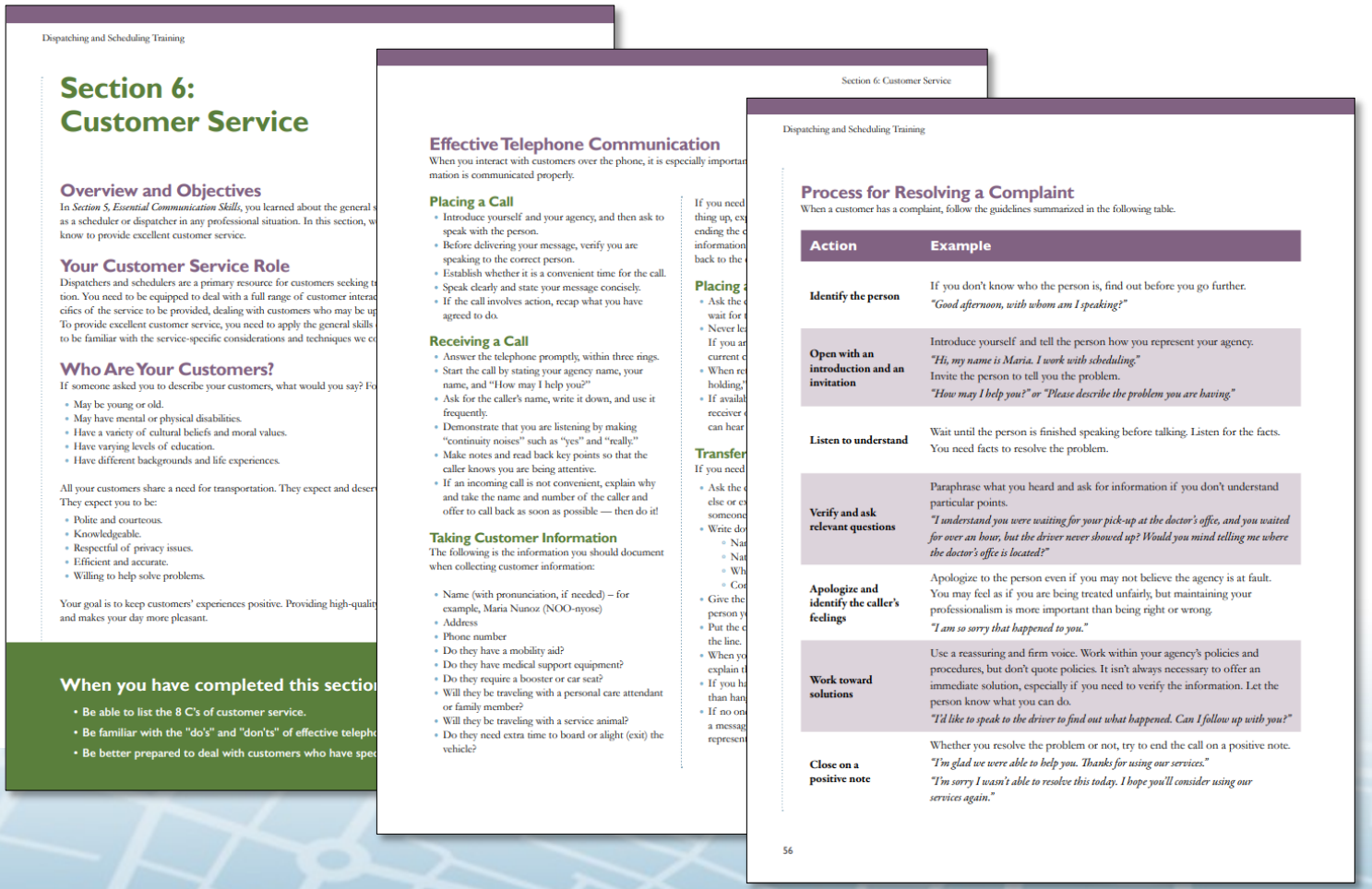
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Dispatching and Scheduling Training

Section 6: Customer Service

Overview and Objectives

In *Section 5, Essential Communication Skills*, you learned about the general s
as a scheduler or dispatcher in any professional situation. In this section, w
know to provide excellent customer service.

Your Customer Service Role

Dispatchers and schedulers are a primary resource for customers seeking t
tion. You need to be equipped to deal with a full range of customer interac
cifics of the service to be provided, dealing with customers who may be up
To provide excellent customer service, you need to apply the general skills
to be familiar with the service-specific considerations and techniques we c

Who Are Your Customers?

If someone asked you to describe your customers, what would you say? Fo

- May be young or old.
- May have mental or physical disabilities.
- Have a variety of cultural beliefs and moral values.
- Have varying levels of education.
- Have different backgrounds and life experiences.

All your customers share a need for transportation. They expect and deser
They expect you to be:

- Polite and courteous.
- Knowledgeable.
- Respectful of privacy issues.
- Efficient and accurate.
- Willing to help solve problems.

Your goal is to keep customers' experiences positive. Providing high-qualit
and makes your day more pleasant.

When you have completed this sectio

- Be able to list the 8 C's of customer service.
- Be familiar with the "do's" and "don'ts" of effective telepho
- Be better prepared to deal with customers who have spe

Section 6: Customer Service

Effective Telephone Communication

When you interact with customers over the phone, it is especially importa
mation is communicated properly.

Placing a Call

- Introduce yourself and your agency, and then ask to speak with the person.
- Before delivering your message, verify you are speaking to the correct person.
- Establish whether it is a convenient time for the call.
- Speak clearly and state your message concisely.
- If the call involves action, recap what you have agreed to do.

Receiving a Call

- Answer the telephone promptly, within three rings.
- Start the call by stating your agency name, your name, and "How may I help you?"
- Ask for the caller's name, write it down, and use it frequently.
- Demonstrate that you are listening by making "continuity noises" such as "yes" and "really."
- Make notes and read back key points so that the caller knows you are being attentive.
- If an incoming call is not convenient, explain why and take the name and number of the caller and offer to call back as soon as possible — then do it!

Taking Customer Information

The following is the information you should document when collecting customer information:

- Name (with pronunciation, if needed) – for example, Maria Nunoz (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 (exit) the vehicle?

Dispatching and Scheduling Training

Process for Resolving a Complaint

When a customer has a complaint, follow the guidelines summarized in the following table.

Action	Example
Identify the person	If you don't know who the person is, find out before you go further. *"Good afternoon, with whom am I speaking?"*
Open with an introduction and an invitation	Introduce yourself and tell the person how you represent your agency. *"Hi, my name is Maria. I work with scheduling."* Invite the person to tell you the problem. *"How may I help you?" or "Please describe the problem you are having."*
Listen to understand	Wait until the person is finished speaking before talking. Listen for the facts. You need facts to resolve the problem.
Verify and ask relevant questions	Paraphrase what you heard and ask for information if you don't understand particular points. *"I understand you were waiting for your pick-up at the doctor's office, and you waited for over an hour, but the driver never showed up? Would you mind telling me where the doctor's office is located?"*
Apologize and identify the caller's feelings	Apologize to the person even if you may not believe the agency is at fault. You may feel as if you are being treated unfairly, but maintaining your professionalism is more important than being right or wrong. *"I am so sorry that happened to you."*
Work toward solutions	Use a reassuring and firm voice. Work within your agency's policies and procedures, but don't quote policies. It isn't always necessary to offer an immediate solution, especially if you need to verify the information. Let the person know what you can do. *"I'd like to speak to the driver to find out what happened. Can I follow up with you?"*
Close on a positive note	Whether you resolve the problem or not, try to end the call on a positive note. *"I'm glad we were able to help you. Thanks for using our services."* *"I'm sorry I wasn't able to resolve this today. I hope you'll consider using our services again."*

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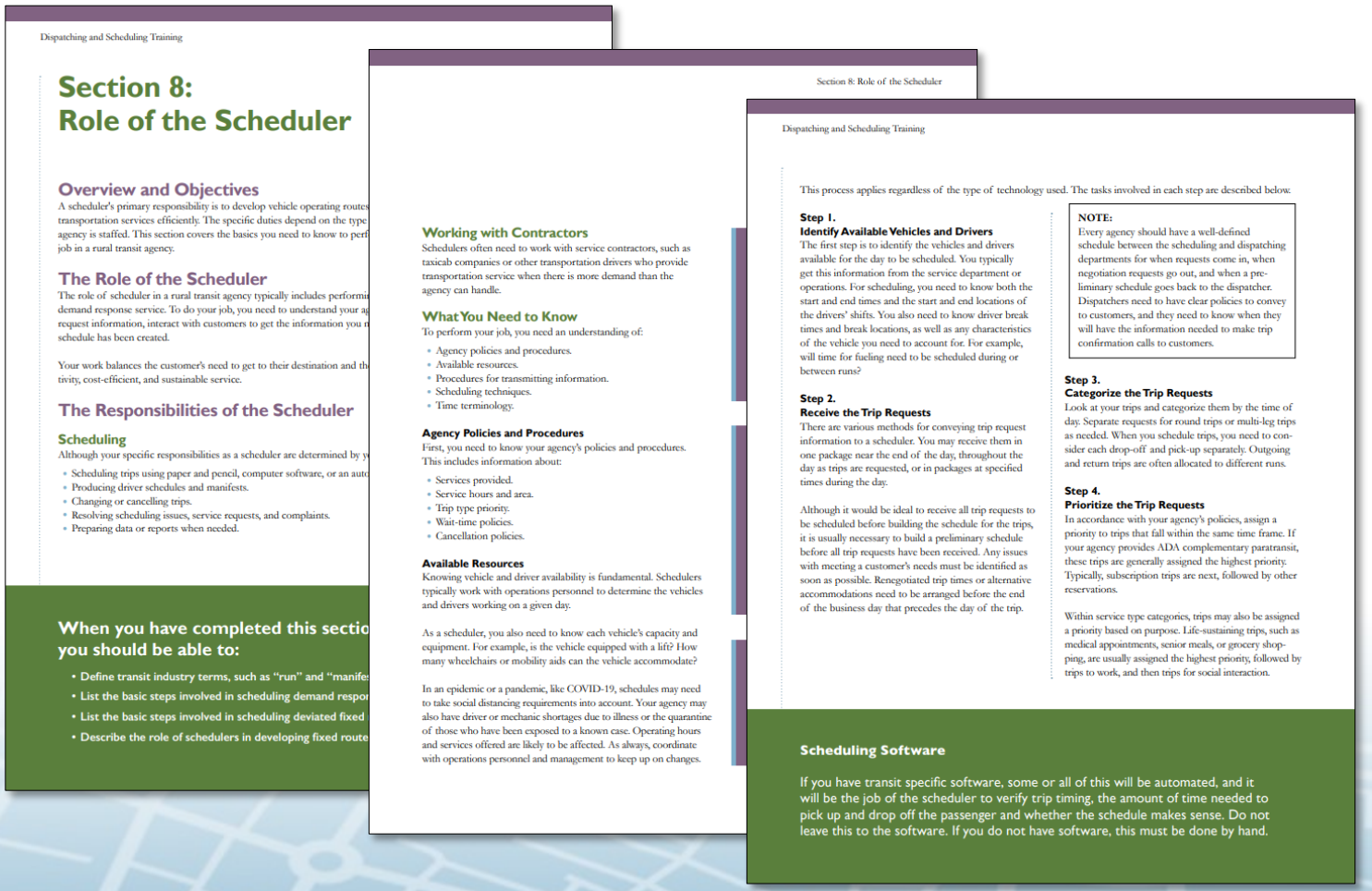
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Dispatching and Scheduling Training

Section 8: Role of the Scheduler

Overview and Objectives

A scheduler's primary responsibility is to develop vehicle operating routes transportation services efficiently. The specific duties depend on the type agency is staffed. This section covers the basics you need to know to perf job in a rural transit agency.

The Role of the Scheduler

The role of scheduler in a rural transit agency typically includes performi demand response service. To do your job, you need to understand your ag request information, interact with customers to get the information you n schedule has been created.

Your work balances the customer's need to get to their destination and th tivity, cost-efficient, and sustainable service.

The Responsibilities of the Scheduler

Scheduling

Although your specific responsibilities as a scheduler are determined by y

- Scheduling trips using paper and pencil, computer software, or an auto
- Producing driver schedules and manifests.
- Changing or cancelling trips.
- Resolving scheduling issues, service requests, and complaints.
- Preparing data or reports when needed.

When you have completed this sectio you should be able to:

- Define transit industry terms, such as "run" and "manife
- List the basic steps involved in scheduling demand respor
- List the basic steps involved in scheduling deviated fixed
- Describe the role of schedulers in developing fixed route

Section 8: Role of the Scheduler

Working with Contractors

Schedulers often need to work with service contractors, such as taxicab companies or other transportation drivers who provide transportation service when there is more demand than the agency can handle.

What You Need to Know

To perform your job, you need an understanding of:

- Agency policies and procedures.
- Available resources.
- Procedures for transmitting information.
- Scheduling techniques.
- Time terminology.

Agency Policies and Procedures

First, you need to know your agency's policies and procedures. This includes information about:

- Services provided.
- Service hours and area.
- Trip type priority.
- Wait-time policies.
- Cancellation policies.

Available Resources

Knowing vehicle and driver availability is fundamental. Schedulers typically work with operations personnel to determine the vehicles and drivers working on a given day.

As a scheduler, you also need to know each vehicle's capacity and equipment. For example, is the vehicle equipped with a lift? How many wheelchairs or mobility aids can the vehicle accommodate?

In an epidemic or a pandemic, like COVID-19, schedules may need to take social distancing requirements into account. Your agency may also have driver or mechanic shortages due to illness or the quarantine of those who have been exposed to a known case. Operating hours and services offered are likely to be affected. As always, coordinate with operations personnel and management to keep up on changes.

Dispatching and Scheduling Training

This process applies regardless of the type of technology used. The tasks involved in each step are described below.

Step 1.
Identify Available Vehicles and Drivers

The first step is to identify the vehicles and drivers available for the day to be scheduled. You typically get this information from the service department or operations. For scheduling, you need to know both the start and end times and the start and end locations of the drivers' shifts. You also need to know driver break times and break locations, as well as any characteristics of the vehicle you need to account for. For example, will time for fueling need to be scheduled during or between runs?

Step 2.
Receive the Trip Requests

There are various methods for conveying trip request information to a scheduler. You may receive them in one package near the end of the day, throughout the day as trips are requested, or in packages at specified times during the day.

Although it would be ideal to receive all trip requests to be scheduled before building the schedule for the trips, it is usually necessary to build a preliminary schedule before all trip requests have been received. Any issues with meeting a customer's needs must be identified as soon as possible. Renegotiated trip times or alternative accommodations need to be arranged before the end of the business day that precedes the day of the trip.

NOTE:
Every agency should have a well-defined schedule between the scheduling and dispatching departments for when requests come in, when negotiation requests go out, and when a preliminary schedule goes back to the dispatcher. Dispatchers need to have clear policies to convey to customers, and they need to know when they will have the information needed to make trip confirmation calls to customers.

Step 3.
Categorize the Trip Requests

Look at your trips and categorize them by the time of day. Separate requests for round trips or multi-leg trips as needed. When you schedule trips, you need to consider each drop-off and pick-up separately. Outgoing and return trips are often allocated to different runs.

Step 4.
Prioritize the Trip Requests

In accordance with your agency's policies, assign a priority to trips that fall within the same time frame. If your agency provides ADA complementary paratransit, these trips are generally assigned the highest priority. Typically, subscription trips are next, followed by other reservations.

Within service type categories, trips may also be assigned a priority based on purpose. Life-sustaining trips, such as medical appointments, senior meals, or grocery shopping, are usually assigned the highest priority, followed by trips to work, and then trips for social interaction.

Scheduling Software

If you have transit specific software, some or all of this will be automated, and it will be the job of the scheduler to verify trip timing, the amount of time needed to pick up and drop off the passenger and whether the schedule makes sense. Do not leave this to the software. If you do not have software, this must be done by hand.

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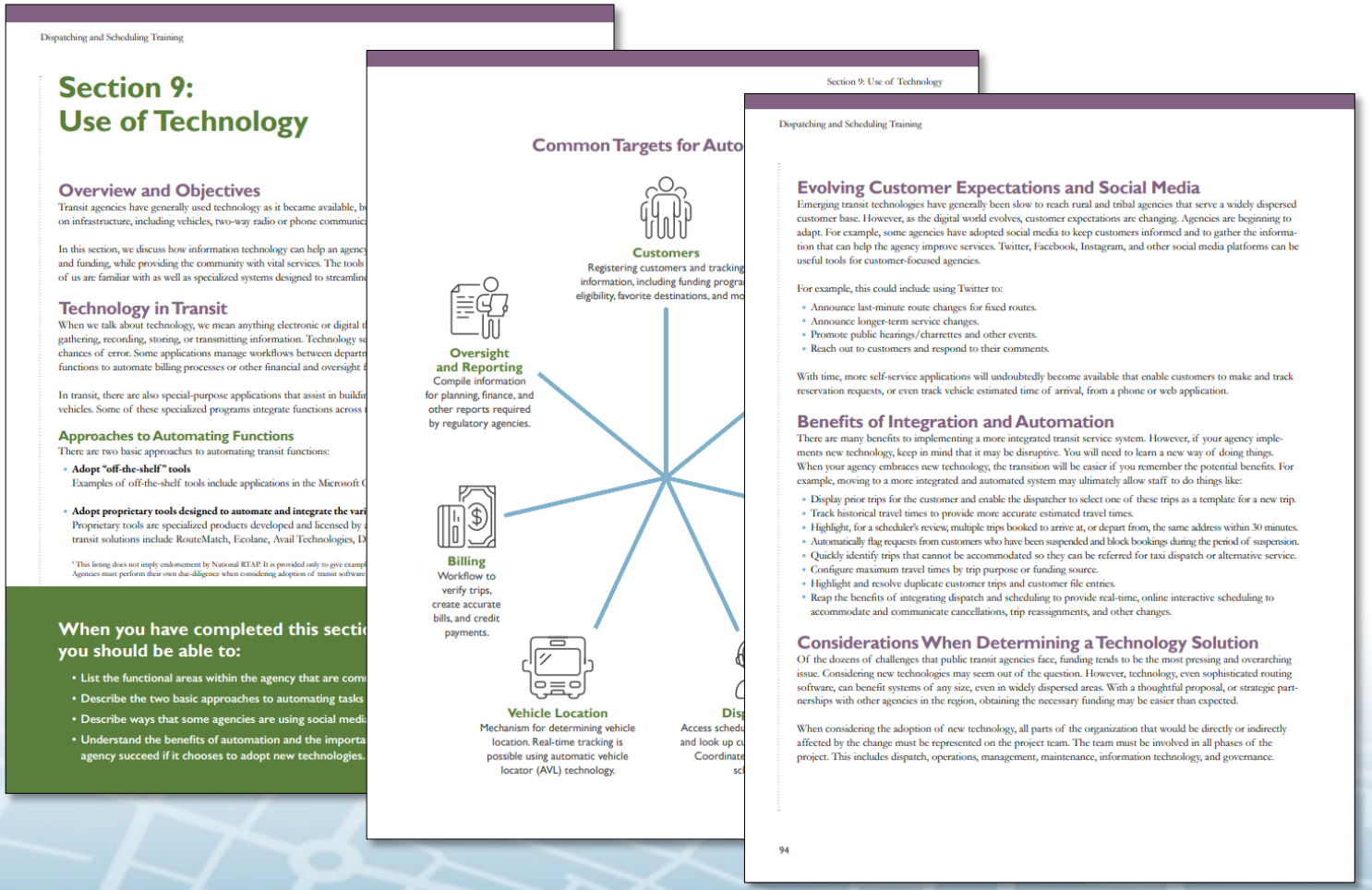
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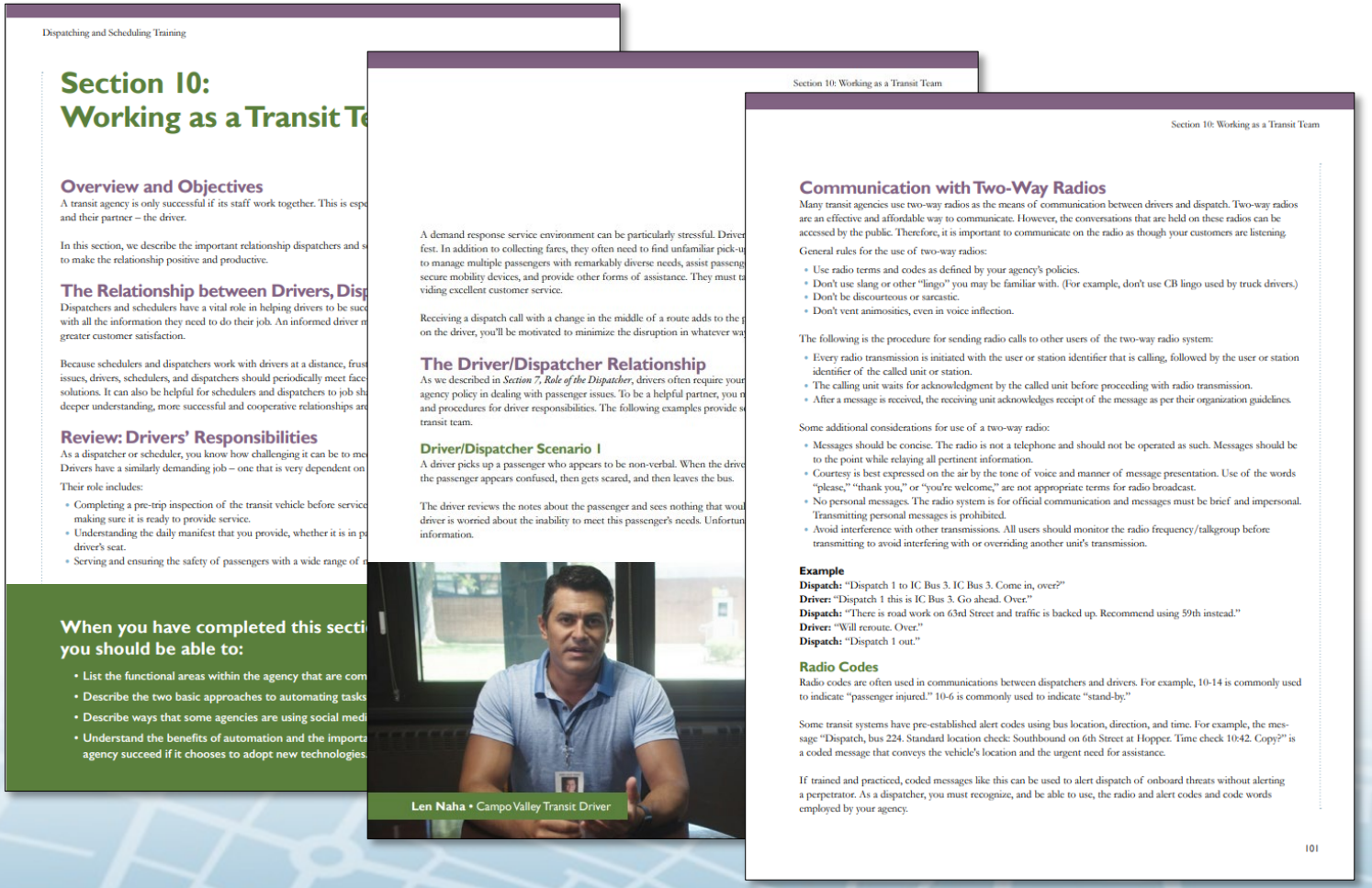
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Dispatching and Scheduling Training

Section 10: Working as a Transit Te

Overview and Objectives

A transit agency is only successful if its staff work together. This is espe
and their partner – the driver.

In this section, we describe the important relationship dispatchers and s
to make the relationship positive and productive.

The Relationship between Drivers, Disp

Dispatchers and schedulers have a vital role in helping drivers to be succ
with all the information they need to do their job. An informed driver m
greater customer satisfaction.

Because schedulers and dispatchers work with drivers at a distance, frust
issues, drivers, schedulers, and dispatchers should periodically meet face-
solutions. It can also be helpful for schedulers and dispatchers to job sh
deeper understanding, more successful and cooperative relationships are

Review: Drivers' Responsibilities

As a dispatcher or scheduler, you know how challenging it can be to me
Drivers have a similarly demanding job – one that is very dependent on

Their role includes:

- Completing a pre-trip inspection of the transit vehicle before service
making sure it is ready to provide service.
- Understanding the daily manifest that you provide, whether it is in p
driver's seat.
- Serving and ensuring the safety of passengers with a wide range of

When you have completed this secti
you should be able to:

- List the functional areas within the agency that are com
- Describe the two basic approaches to automating tasks
- Describe ways that some agencies are using social medi
- Understand the benefits of automation and the importa
agency succeed if it chooses to adopt new technologies.

Section 10: Working as a Transit Team

A demand response service environment can be particularly stressful. Driver
fest. In addition to collecting fares, they often need to find unfamiliar pick-u
to manage multiple passengers with remarkably diverse needs, assist passeng
secure mobility devices, and provide other forms of assistance. They must ta
viding excellent customer service.

Receiving a dispatch call with a change in the middle of a route adds to the
on the driver, you'll be motivated to minimize the disruption in whatever wa

The Driver/Dispatcher Relationship

As we described in *Section 7, Role of the Dispatcher*, drivers often require your
agency policy in dealing with passenger issues. To be a helpful partner, you n
and procedures for driver responsibilities. The following examples provide s
transit team.

Driver/Dispatcher Scenario 1

A driver picks up a passenger who appears to be non-verbal. When the drive
the passenger appears confused, then gets scared, and then leaves the bus.

The driver reviews the notes about the passenger and sees nothing that woul
driver is worried about the inability to meet this passenger's needs. Unfortun
information.

Len Naha • Campo Valley Transit Driver

Section 10: Working as a Transit Team

Communication with Two-Way Radios

Many transit agencies use two-way radios as the means of communication between drivers and dispatch. Two-way radios are an effective and affordable way to communicate. However, the conversations that are held on these radios can be accessed by the public. Therefore, it is important to communicate on the radio as though your customers are listening.

General rules for the use of two-way radios:

- Use radio terms and codes as defined by your agency's policies.
- Don't use slang or other "lingo" you may be familiar with. (For example, don't use CB lingo used by truck drivers.)
- Don't be discourteous or sarcastic.
- Don't vent animosities, even in voice inflection.

The following is the procedure for sending radio calls to other users of the two-way radio system:

- Every radio transmission is initiated with the user or station identifier that is calling, followed by the user or station identifier of the called unit or station.
- The calling unit waits for acknowledgment by the called unit before proceeding with radio transmission.
- After a message is received, the receiving unit acknowledges receipt of the message as per their organization guidelines.

Some additional considerations for use of a two-way radio:

- Messages should be concise. The radio is not a telephone and should not be operated as such. Messages should be to the point while relaying all pertinent information.
- Courtesy is best expressed on the air by the tone of voice and manner of message presentation. Use of the words "please," "thank you," or "you're welcome," are not appropriate terms for radio broadcast.
- No personal messages. The radio system is for official communication and messages must be brief and impersonal. Transmitting personal messages is prohibited.
- Avoid interference with other transmissions. All users should monitor the radio frequency/talkgroup before transmitting to avoid interfering with or overriding another unit's transmission.

Example
Dispatch: "Dispatch 1 to IC Bus 3. IC Bus 3. Come in, over?"
Driver: "Dispatch 1 this is IC Bus 3. Go ahead. Over."
Dispatch: "There is road work on 63rd Street and traffic is backed up. Recommend using 59th instead."
Driver: "Will reroute. Over."
Dispatch: "Dispatch 1 out."

Radio Codes

Radio codes are often used in communications between dispatchers and drivers. For example, 10-14 is commonly used to indicate "passenger injured." 10-6 is commonly used to indicate "stand-by."

Some transit systems have pre-established alert codes using bus location, direction, and time. For example, the message "Dispatch, bus 224. Standard location check: Southbound on 6th Street at Hopper. Time check 10:42. Copy?" is a coded message that conveys the vehicle's location and the urgent need for assistance.

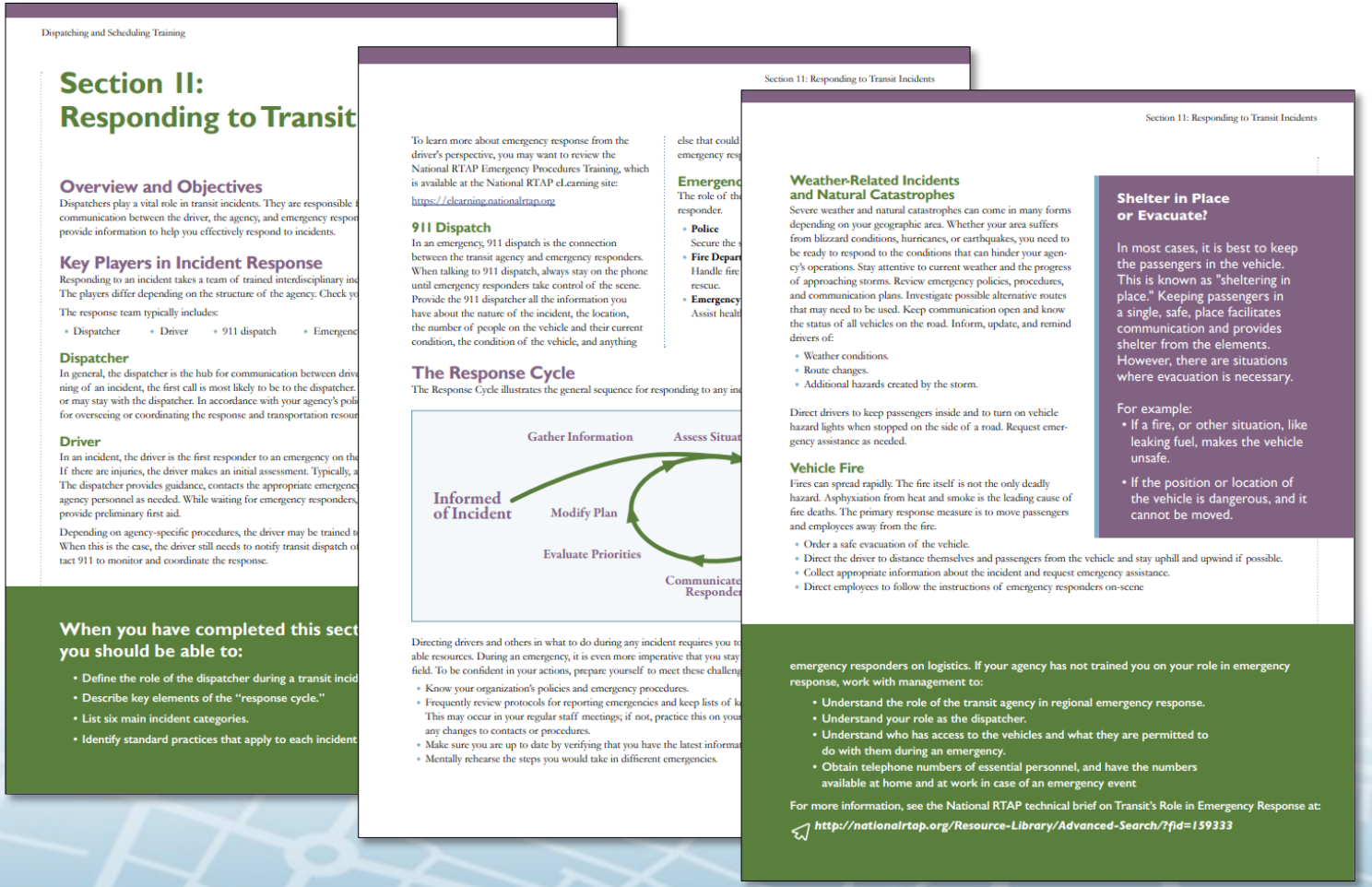
If trained and practiced, coded messages like this can be used to alert dispatch of onboard threats without alerting a perpetrator. As a dispatcher, you must recognize, and be able to use, the radio and alert codes and code words employed by your agency.

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Dispatching and Scheduling Training

Section 11: Responding to Transit

Overview and Objectives

Key Players in Incident Response

Dispatcher

Driver

When you have completed this sect you should be able to:

- Define the role of the dispatcher during a transit incid
- Describe key elements of the "response cycle."
- List six main incident categories.
- Identify standard practices that apply to each incident

Section 11: Responding to Transit Incidents

To learn more about emergency response from the driver's perspective, you may want to review the National RTAP Emergency Procedures Training, which is available at the National RTAP eLearning site:

https://elearning.nationalrtap.org

911 Dispatch

The Response Cycle

Gather Information

Assess Situat

Informed of Incident

Modify Plan

Evaluate Priorities

Communicate Responde

Section 11: Responding to Transit Incidents

Weather-Related Incidents and Natural Catastrophes

Severe weather and natural catastrophes can come in many forms depending on your geographic area. Whether your area suffers from blizzard conditions, hurricanes, or earthquakes, you need to be ready to respond to the conditions that can hinder your agency's operations. Stay attentive to current weather and the progress of approaching storms. Review emergency policies, procedures, and communication plans. Investigate possible alternative routes that may need to be used. Keep communication open and know the status of all vehicles on the road. Inform, update, and remind drivers of:

- Weather conditions.
- Route changes.
- Additional hazards created by the storm.

Direct drivers to keep passengers inside and to turn on vehicle hazard lights when stopped on the side of a road. Request emergency assistance as needed.

Vehicle Fire

Fires can spread rapidly. The fire itself is not the only deadly hazard. Asphyxiation from heat and smoke is the leading cause of fire deaths. The primary response measure is to move passengers and employees away from the fire.

- Order a safe evacuation of the vehicle.
- Direct the driver to distance themselves and passengers from the vehicle and stay uphill and upwind if possible.
- Collect appropriate information about the incident and request emergency assistance.
- Direct employees to follow the instructions of emergency responders on-scene

Shelter in Place or Evacuate?

In most cases, it is best to keep the passengers in the vehicle. This is known as "sheltering in place." Keeping passengers in a single, safe, place facilitates communication and provides shelter from the elements. However, there are situations where evacuation is necessary.

For example:

- If a fire, or other situation, like leaking fuel, makes the vehicle unsafe.
- If the position or location of the vehicle is dangerous, and it cannot be moved.

emergency responders on logistics. If your agency has not trained you on your role in emergency response, work with management to:

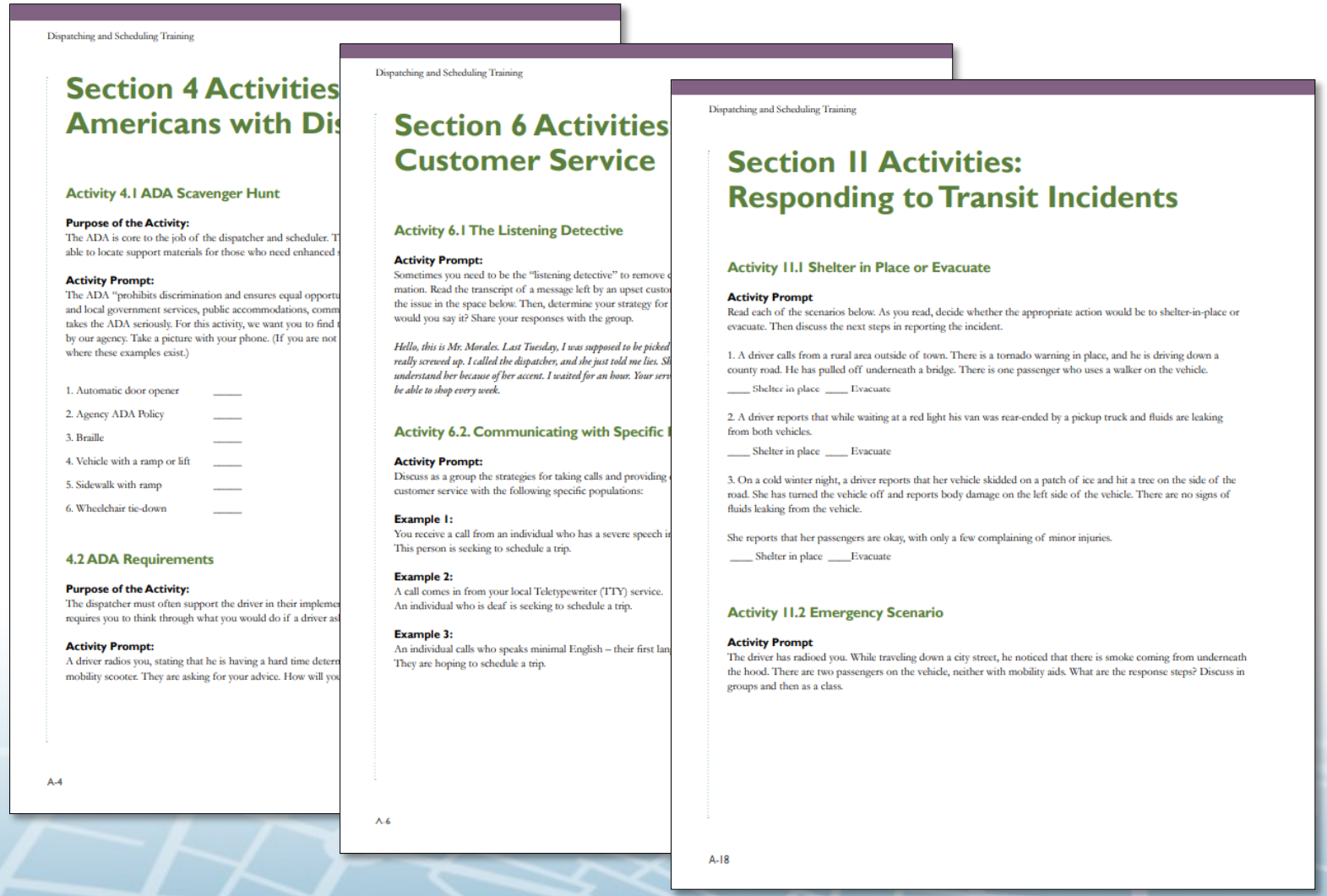
- Understand the role of the transit agency in regional emergency response.
- Understand your role as the dispatcher.
- Understand who has access to the vehicles and what they are permitted to do with them during an emergency.
- Obtain telephone numbers of essential personnel, and have the numbers available at home and at work in case of an emergency event

For more information, see the National RTAP technical brief on Transit's Role in Emergency Response at:

http://nationalrtap.org/Resource-Library/Advanced-Search/?fid=159333

Activities

- Activities are provided for each chapter.
- Includes:
  - Discussion prompts
  - Quizzes
  - Scheduling exercises



Dispatching and Scheduling Training

Section 4 Activities
Americans with Di

Activity 4.1 ADA Scavenger Hunt

Purpose of the Activity:
The ADA is core to the job of the dispatcher and scheduler. T
able to locate support materials for those who need enhanced

Activity Prompt:
The ADA "prohibits discrimination and ensures equal opportu
and local government services, public accommodations, comm
takes the ADA seriously. For this activity, we want you to find
by our agency. Take a picture with your phone. (If you are not
where these examples exist.)

1. Automatic door opener _____
2. Agency ADA Policy _____
3. Braille _____
4. Vehicle with a ramp or lift _____
5. Sidewalk with ramp _____
6. Wheelchair tie-down _____

4.2 ADA Requirements

Purpose of the Activity:
The dispatcher must often support the driver in their implem
requires you to think through what you would do if a driver as

Activity Prompt:
A driver radios you, stating that he is having a hard time deter
mobility scooter. They are asking for your advice. How will yo

A-4

Dispatching and Scheduling Training

Section 6 Activities
Customer Service

Activity 6.1 The Listening Detective

Activity Prompt:
Sometimes you need to be the "listening detective" to remove
mation. Read the transcript of a message left by an upset custo
the issue in the space below. Then, determine your strategy for
would you say it? Share your responses with the group.

*Hello, this is Mr. Morales. Last Tuesday, I was supposed to be picked
really screwed up. I called the dispatcher, and she just told me lies. Sh
understand her because of her accent. I waited for an hour. Your serv
be able to shop every week.*

Activity 6.2. Communicating with Specific

Activity Prompt:
Discuss as a group the strategies for taking calls and providing
customer service with the following specific populations:

Example 1:
You receive a call from an individual who has a severe speech i
This person is seeking to schedule a trip.

Example 2:
A call comes in from your local Teletypewriter (TTY) service.
An individual who is deaf is seeking to schedule a trip.

Example 3:
An individual calls who speaks minimal English – their first lan
They are hoping to schedule a trip.

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Dispatching and Scheduling Training

Section 11 Activities:
Responding to Transit Incidents

Activity 11.1 Shelter in Place or Evacuate

Activity Prompt
Read each of the scenarios below. As you read, decide whether the appropriate action would be to shelter-in-place or evacuate. Then discuss the next steps in reporting the incident.

1. A driver calls from a rural area outside of town. There is a tornado warning in place, and he is driving down a county road. He has pulled off underneath a bridge. There is one passenger who uses a walker on the vehicle.
____ Shelter in place ____ Evacuate

2. A driver reports that while waiting at a red light his van was rear-ended by a pickup 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

Activity 11.2 Emergency Scenario

Activity Prompt
The driver has radioed you. While traveling down a city street, he noticed that there is smoke coming from underneath the hood. There are two passengers on the vehicle, neither with mobility aids. What are the response steps? Discuss in groups and then as a class.

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Quick Reference and Phone Scripts



Appendix C: Quick Reference

Dispatching in Demand Response: What You Need to Know

What you need to know as a dispatcher in a demand response environment includes the service a vehicle and fleet details, driver details, related services, and job-related technology. If your agency plementary paratransit you must also be familiar with your agency's ADA complementary paratra regulations covered in *Section 4, ADA Complementary Paratransit.*

Service Area

The service area represents the specific geographic location where an agency pr response service. You must know your service area and have the means to deter the origin and destination of a trip request fall within the area.

Service Hours

Service hours identify times for the first pick-up and last drop-off on weekdays, w holidays.

Keep in mind that the first pick-up time and last drop-off time may be different locations within the service area. For example, a destination 20 miles away from may have a last drop-off time 30 minutes before the end of the service day.

Vehicle and Fleet Details

Drivers may ask the dispatcher for support related to issues with their vehicle w is therefore essential that they know the types of vehicles in the fleet, characteris vehicles (if the vehicles have ramps and how many wheelchairs or scooters can l dated), and other essential information about each type of vehicle.

Details About the Drivers

Knowing who the drivers are and their schedules (which are provided by the sch the dispatcher to quickly communicate with the driver about issues specific to a

Job-Related Technology

Depending on the agency, the dispatcher may use a database or specialized softw cordkeeping and dispatching trips. We discuss different types of technology in *Technology*.

Related Services

If your agency provides service to points where passengers transfer to another route, rail, or other transportation service. You should be familiar with the oper routes covered by the connecting services and be prepared to refer customers t vice provider for information. You should also keep information about local vo taxi, ride-hailing, and other transit services your customers may need.

Dispatching and Scheduling Training

Considerations in Diversity Awareness

Individuals with Disabilities

- Put people first, not their disability. For example, "She is a person who has multiple sclerosis." or "He uses a wheelchair for transport."
- Wait until your offer of assistance is accepted before acting.
- Refrain from leaning on a wheelchair or other assistive device. Consider it as part of the owner's body.
- Ask the owner of a service animal if it is okay to interact with it.
- Identify yourself when meeting or greeting someone with a visual impairment.
- Make eye contact and speak directly to a person who is hearing impaired. Speak clearly and naturally, without shouting.

Cultural Differences

- Get to know people as individuals. Ask questions about music, food, or holidays that differ from your culture.
- Build trust by acknowledging and respecting c ultural differences.
- Be aware that a person's culture may affect their communication style and how they interact. There may be differences in the meaning of eye contact, handshakes, or other hand gestures. There may also be differences in other areas, such as expectations of personal space.
- Recognize that attitudes toward conflict may vary based on cultural background.
- Recognize that approaches to completing tasks and decision making may be dissimilar.

Generational Differences

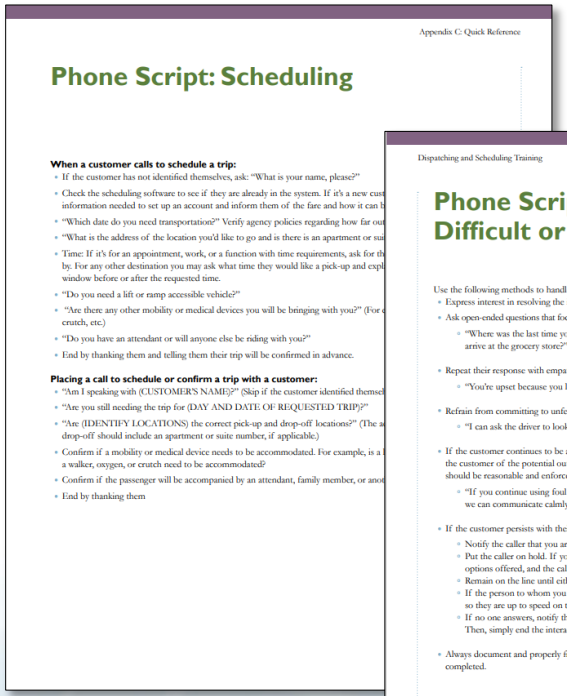
- Be aware of stereotypes about older or younger persons and don't act upon them.
- Value the contributions of all employees, regardless of age.
- Avoid comments and behavior based on a person's age.

Language Differences

- Use simple words and phrases and avoid the use of slang words.
- If help is available from another person who can interpret, request it.
- Speak clearly and slowly, not loudly. When language is the barrier, it is not a hearing problem. Speaking more loudly won't help and may be perceived as aggressive.
- Ask questions or repeat the information until you both understand the message.
- Pay attention to non-verbal cues that signal a lack of understanding
- Be patient. Don't get frustrated.
- Use symbols, visuals, charts, maps, or other graphics to communicate when available or appropriate.
- Use active listening to paraphrase back what you heard.
- Allow the person to finish their thoughts and sentences.
- Be comfortable with silence and long pauses. It may take the person more time to process what you have said.

If the language is one you are likely to encounter regularly, learn keywords, phrases, and ways to express concepts relevant to performing your job.

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Appendix C: Quick Reference

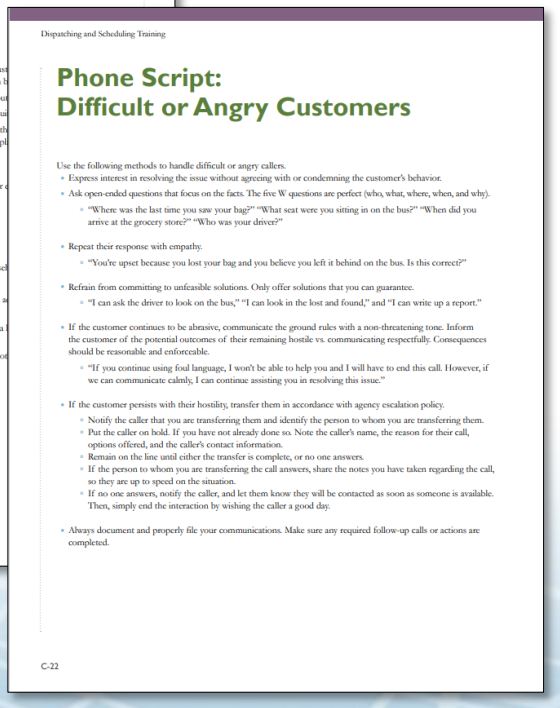
Phone Script: Scheduling

When a customer calls to schedule a trip:

- If the customer 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 cust information needed to set up an account and inform them of the fare and how it can b
- "Which date do you need transportation?" Verify agency policies regarding how far ou
- "What is the address of the location you'd like to go and is there is an apartment or sui
- Time: If it's for an appointment, work, or a function with time requirements, ask for th by. For any other destination you may ask what time they would like a pick-up and expl window before or after the requested time.
- "Do you need a lift or ramp accessible vehicle?"
- "Are there any other mobility or medical devices you will be bringing with you?" (For cruteh, etc.)
- "Do you have an attendant or will anyone else be riding with you?"
- End by thanking them and telling them their trip will be confirmed in advance.

Placing a call to schedule or confirm a trip with a customer:

- "Am I speaking with (CUSTOMER'S NAME)?" (Skip if the customer identified themsel
- "Are you still needing the trip for (DAY AND DATE OF REQUESTED TRIP)?"
- "Are (IDENTIFY LOCATIONS) the correct pick-up and drop-off locations?" (The a drop-off should include an apartment or suite number, if applicable.)
- Confirm if a mobility or medical device needs to be accommodated. For example, is a a walker, oxygen, or crutch need to be accommodated?
- Confirm if the passenger will be accompanied by an attendant, family member, or anot
- End by thanking them



Dispatching and Scheduling Training

Phone Script: Difficult or Angry Customers

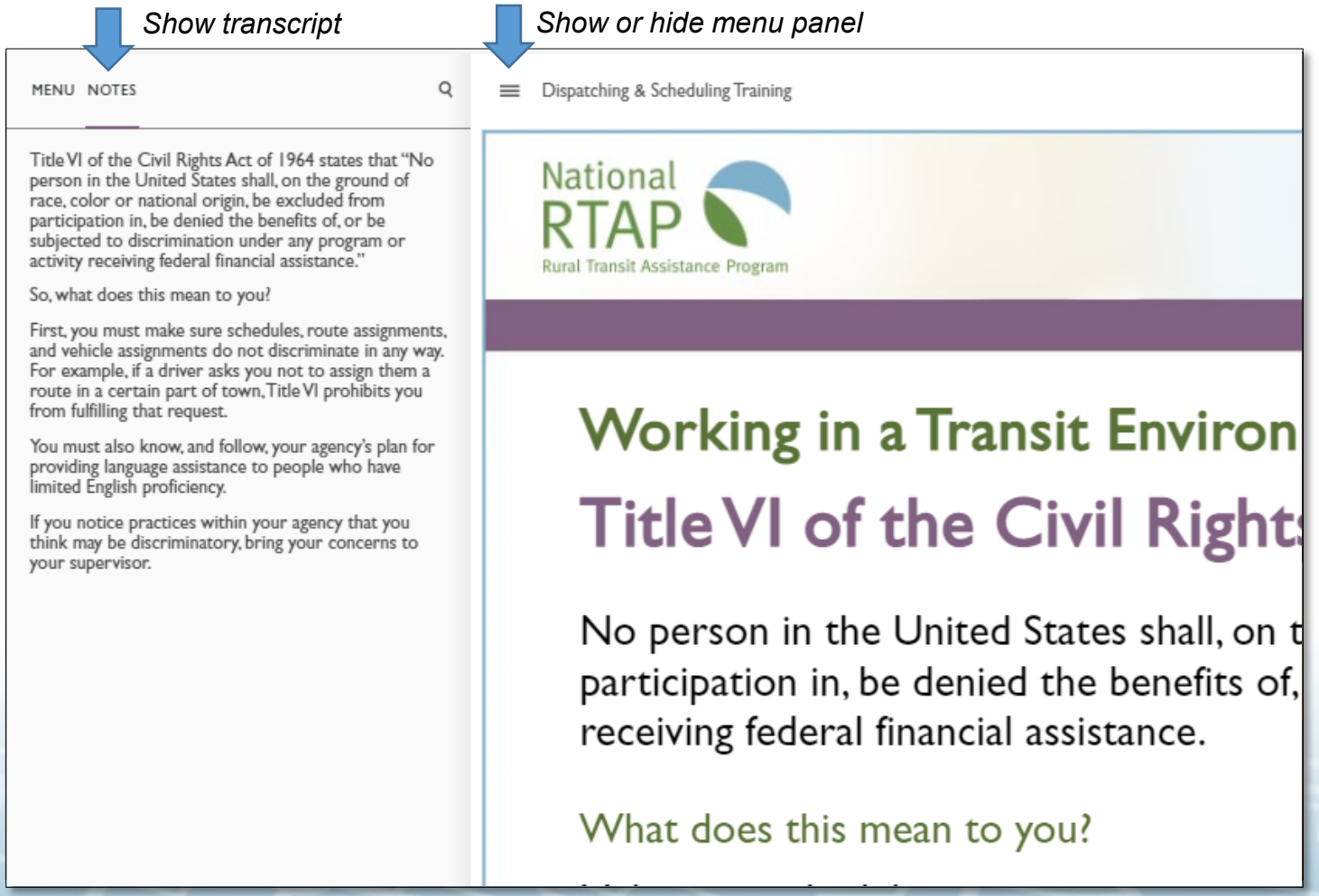
Use the following methods to handle difficult or angry callers.

- 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, and 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 driver?"
- Repeat their response with empathy.
  - "You're upset because you lost your bag and you believe you 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 driver to look on the bus," "I can look in the lost and found," and "I can write up 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 won't be able to help you and I will have to end this call. However, if we can communicate calmly, I can continue assisting you in resolving this issue."
- If the customer persists with their hostility, transfer them in accordance with agency escalation policy.
  - Notify the caller that you are transferring them and identify the person to whom you are transferring them.
  - Put the caller on hold. If you have not already done so. Note the caller's name, the reason for their call, options offered, and the caller's contact information.
  - Remain on the line until either the transfer is complete, or no one answers.
  - If 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 them know they will be contacted as soon as someone is available. Then, simply end the interaction by wishing the caller a good day.
- Always document and properly file your communications. Make sure any required follow-up calls or actions are completed.

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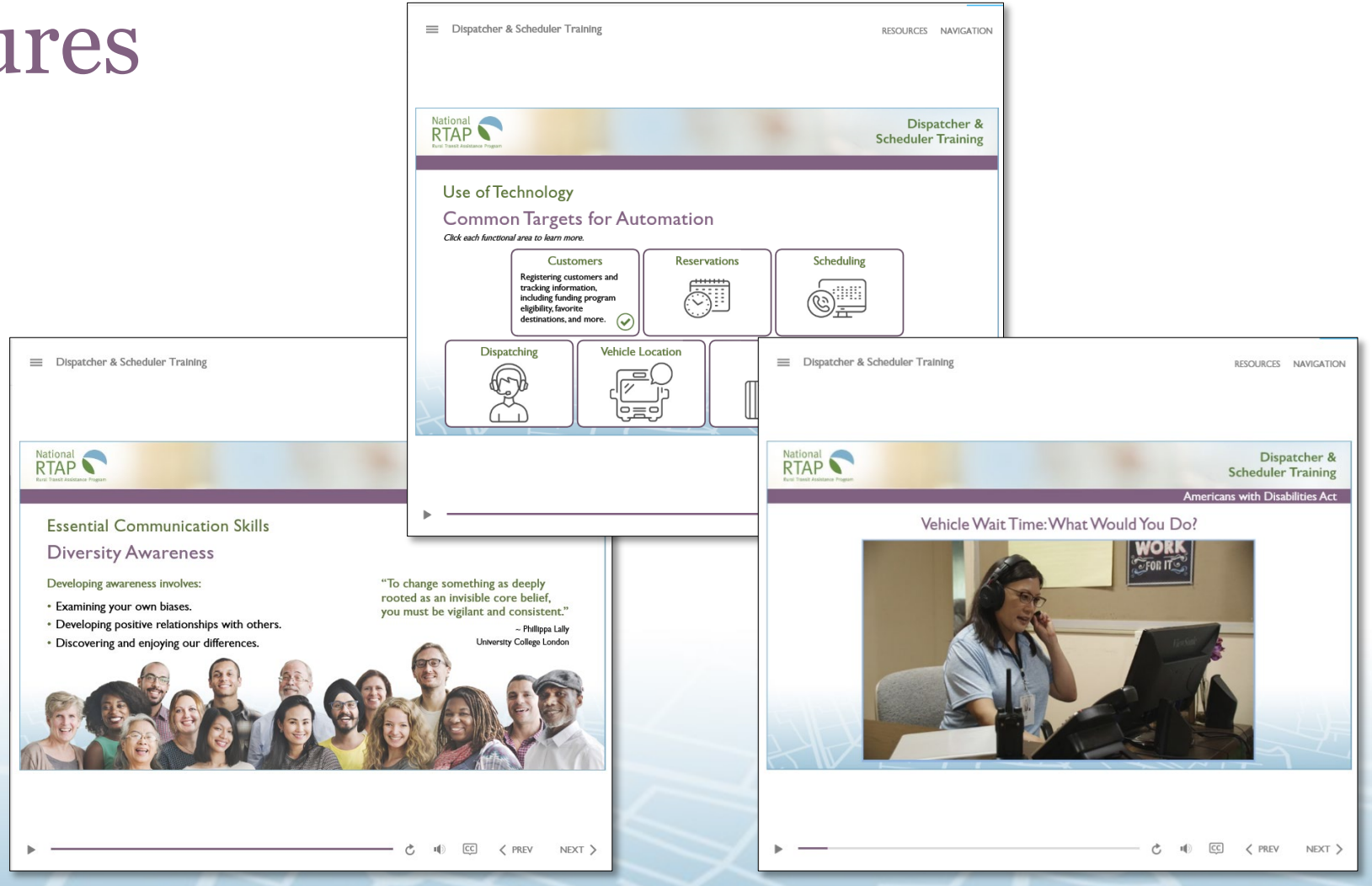
eLearning Features

- Duration: approximately 4 hours
- You can start and stop any time, taking the course at your own pace
- The course includes:
  - Menu navigation
  - A transcript of the narration



eLearning Features

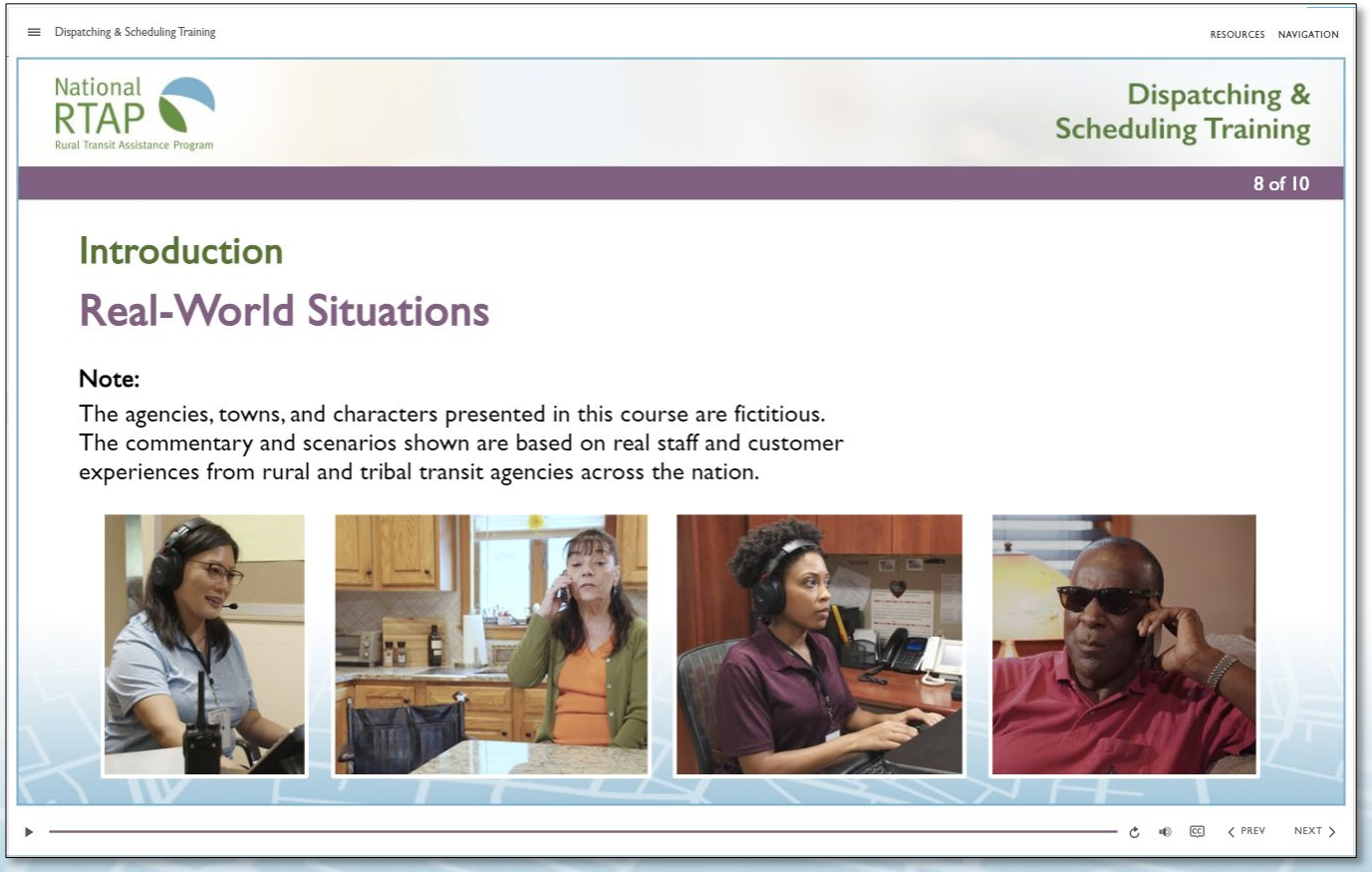
- Voiceover narration
- Click to reveal and other interactions
- Video commentary
- Video scenarios



eLearning Features

Video commentary and scenarios include the following topics:

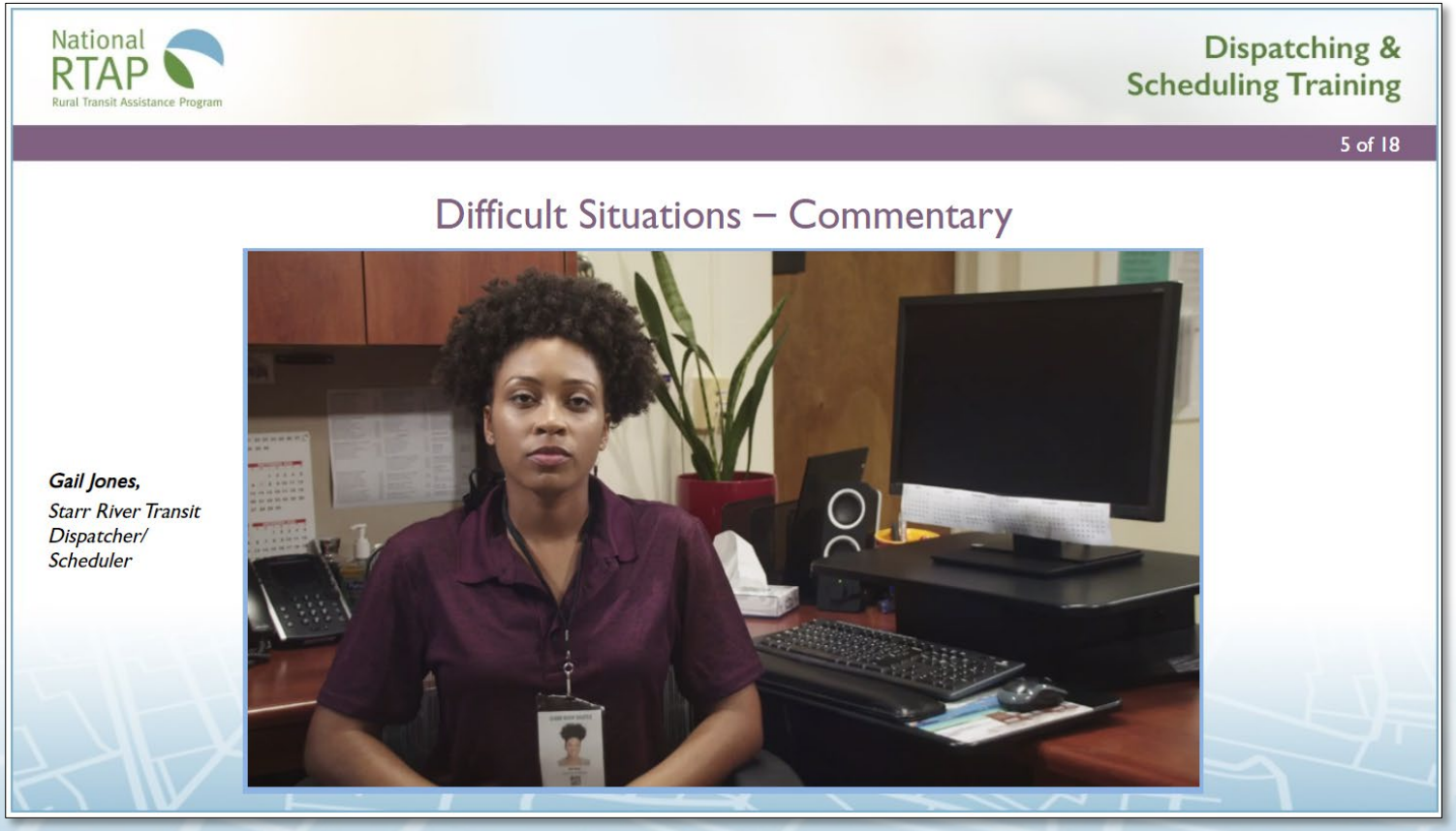
- Role of dispatcher and scheduler
- Interactions with passengers
- Taking trip requests
- Adjusting schedules
- Emergency situations



eLearning Features

Video sample: Difficult Situations

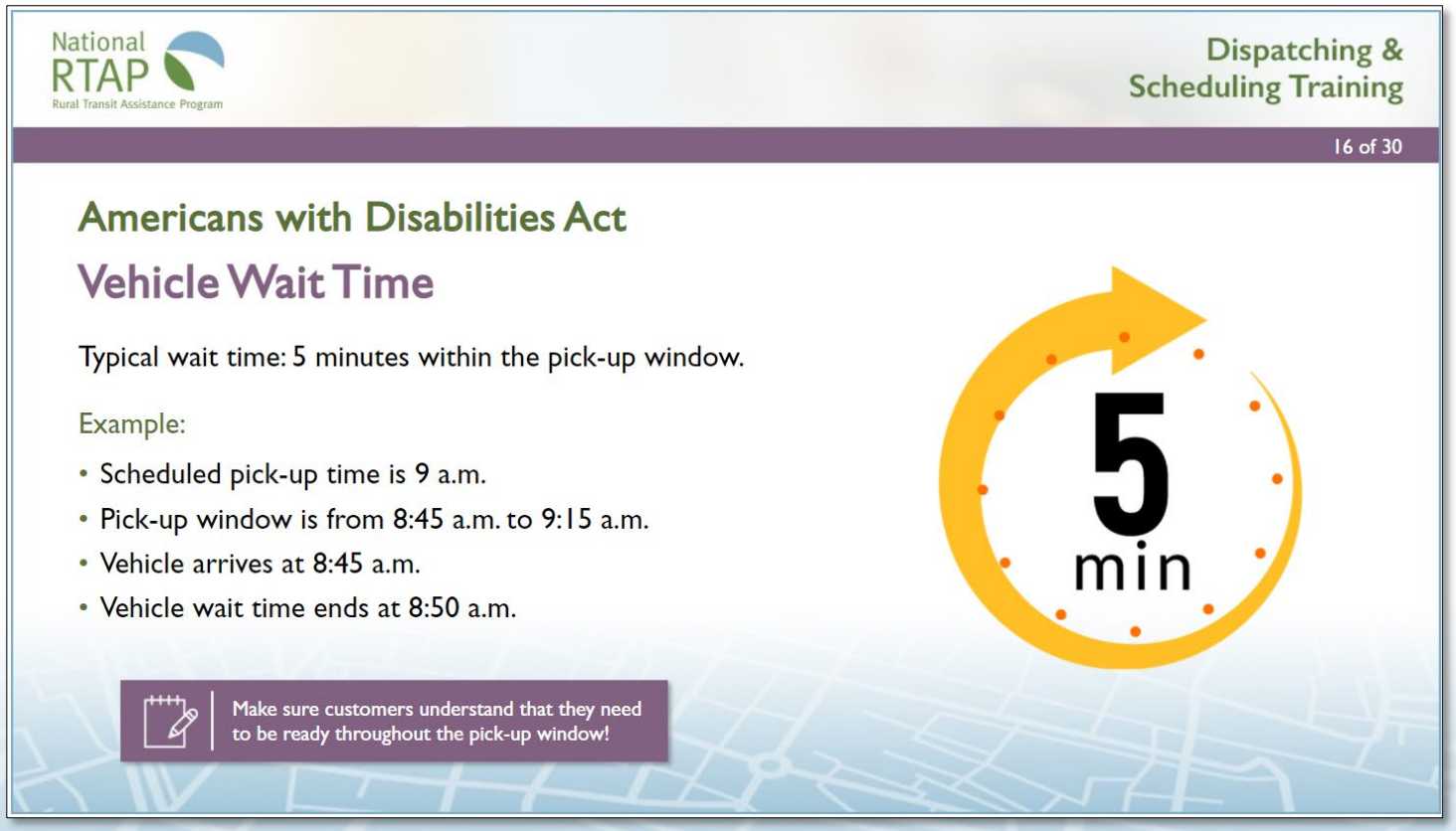
Click to play video segment.



eLearning Features

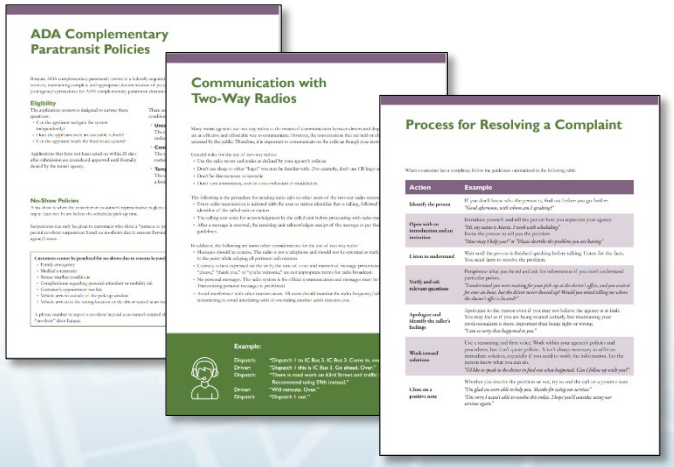
Segment of application showing screen samples with a video and question.

Click to play sample segment.

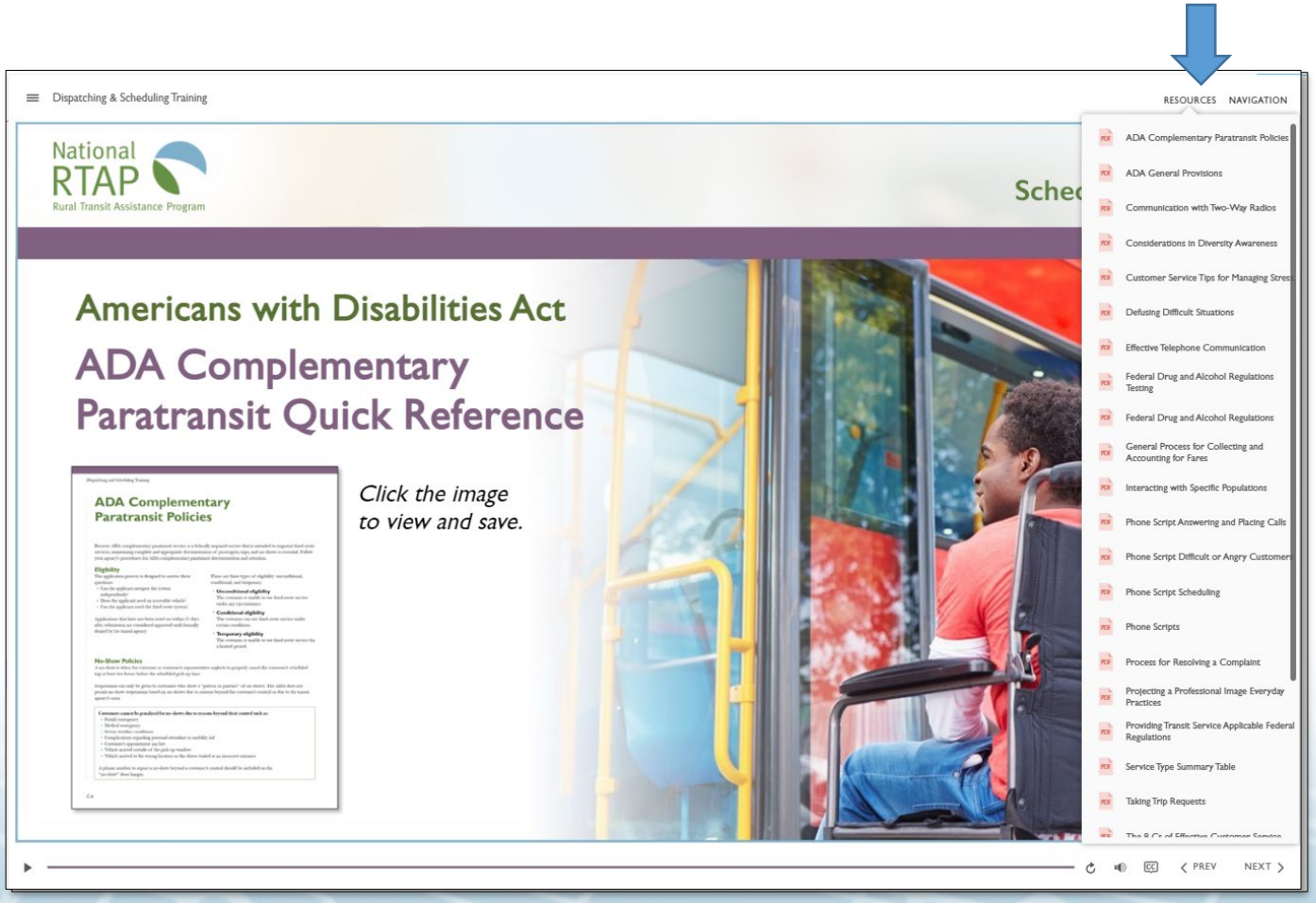


eLearning Features

- Links to PDF quick reference documents are:
  - Provided from within the course.
  - Available from the Resources link.

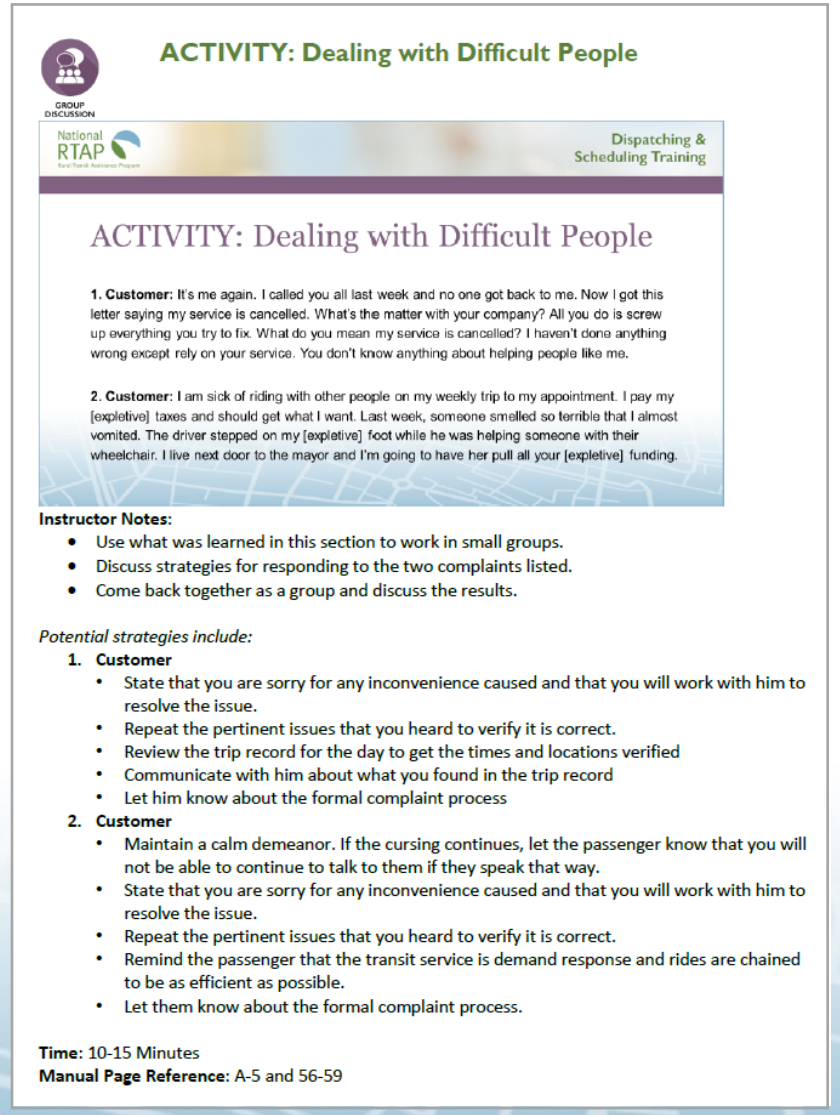


All quick reference content from the manual is included in the eLearning



Instructor-Led Training

- PowerPoint presentation
- Instructor guide
- In-person activities
- Videos available on YouTube or a disc
- Certificate of completion
- Course feedback form



ACTIVITY: Dealing with Difficult People

GROUP DISCUSSION

National RTAP — Dispatching & Scheduling Training

ACTIVITY: Dealing with Difficult People

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.

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

Instructor Notes:

- Use what was learned in this section to work in small groups.
- Discuss strategies for responding to the two complaints listed.
- Come back together as a group and discuss the results.

Potential strategies include:

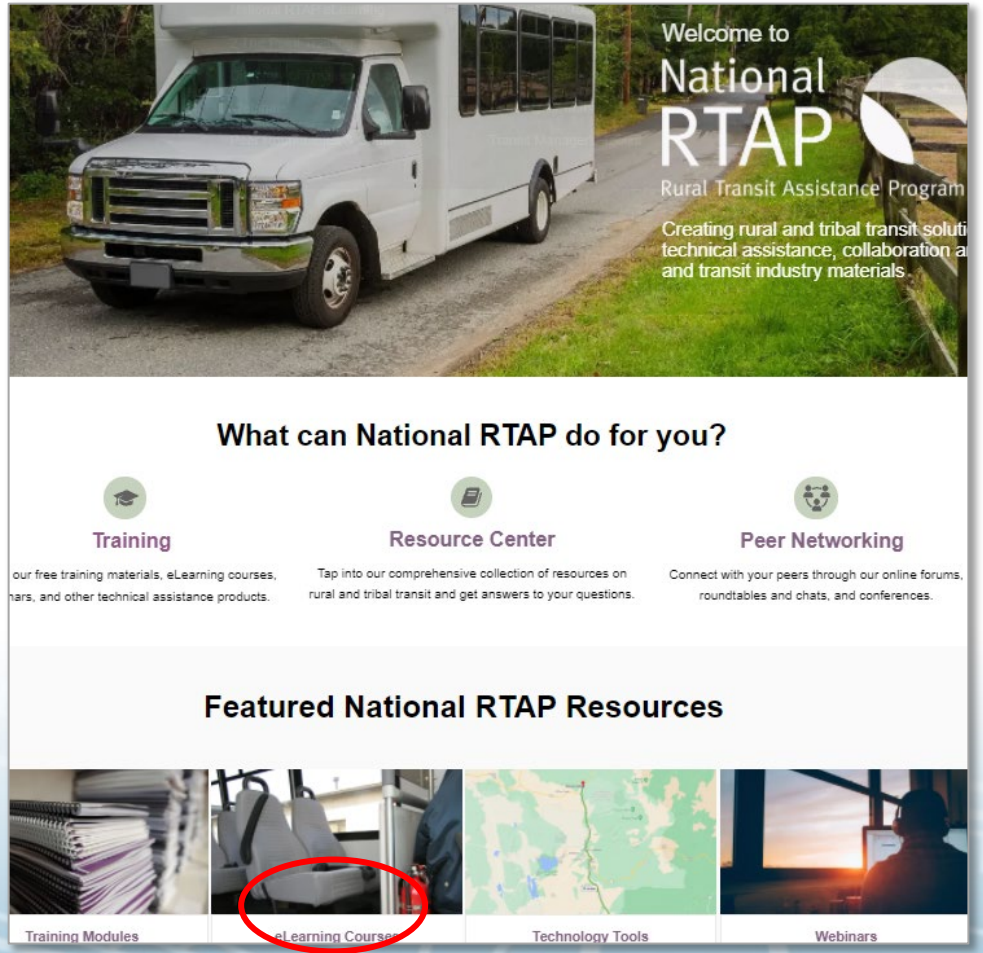
1. **Customer**
   - State that you are sorry for any inconvenience caused and that you will work with him to resolve the issue.
   - Repeat the pertinent issues that you heard to verify it is correct.
   - Review the trip record for the day to get the times and locations verified
   - Communicate with him about what you found in the trip record
   - Let him know about the formal complaint process
2. **Customer**
   - Maintain a calm demeanor. If the cursing continues, let the passenger know that you will not be able to continue to talk to them if they speak that way.
   - State that you are sorry for any inconvenience caused and that you will work with him to resolve the issue.
   - Repeat the pertinent issues that you heard to verify it is correct.
   - Remind the passenger that the transit service is demand response and rides are chained to be as efficient as possible.
   - Let them know about the formal complaint process.

Time: 10-15 Minutes
Manual Page Reference: A-5 and 56-59

Accessing the eLearning Course

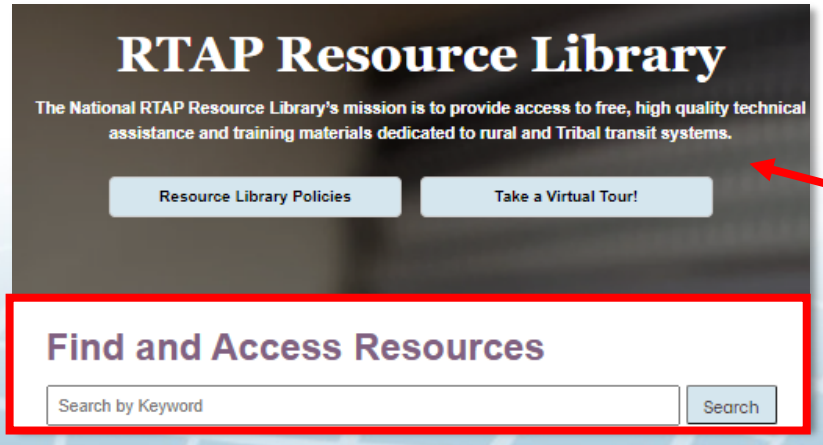
- Available at National RTAP eLearning: elearning.nationalrtap.org/. Registration is required but is free and all courses are free.

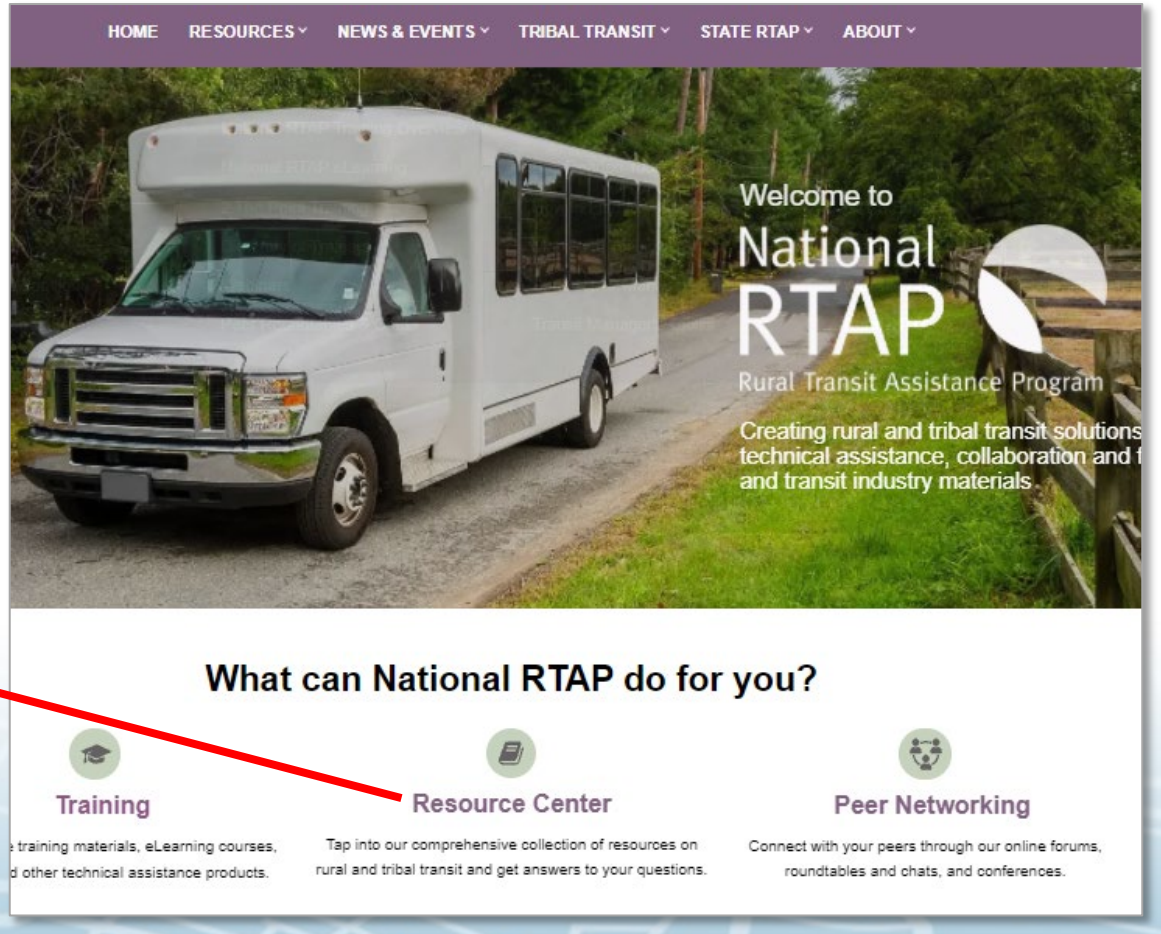




Accessing the Course Materials

- The manual and instructor materials are available at: www.nationalrtap.org/Resource-Center/Resource-Library. You can order up 100 copies at a time. Everything is free.
- The videos are also available on National RTAP's YouTube channel in the Dispatching and Scheduling playlist at: www.youtube.com/channel/UCc4brioxdz-zWOcgNOuOKXw/playlists





National RTAP
Rural Transit Assistance Program

Dispatching & Scheduling Training

Guidance for Managers



How to Support your Dispatchers and Schedulers

What do dispatchers and schedulers need?

- Encouraging, supportive, and available manager
- Training on components of the job and any technology used
- A safe and comfortable workspace with the necessary tools and reference information easily accessible
- Cooperative team with regular opportunities for open communication
- Technology that works and aids in the completion of the job
- Space to take a break, vent, relax

Finding Great Staff

- Social media advertising
- Postings at Tech School, University, or Community College Career Centers
- Outdoor temporary signs
- Word of mouth from current employees (with recruitment bonuses)



Important Skills/Temperament/Experience

Dispatchers

- Customer service
- Multitasking
- Thinking on the fly
- Composure

Schedulers

- Teamwork
- Math or analytical skills
- Ability to make decisions quickly

Best Jobs that Dovetail with this Work

Dispatchers

- Retail/food service
- Social service
- Call centers

Schedulers

- Shipping companies/postal service
- Logistics
- Supply chain management

Developing a Training Plan for Schedulers and Dispatchers

Training	Course Location	Initial Training	Frequency of Refresher
Employee Policies	Locally developed	First Week	Annually
Ridership Policies	Locally developed	First Week	Every 6 months
Drug and Alcohol Program	National RTAP or Drug and Alcohol Testing Contractor	First Week	Annually
Americans with Disabilities Act	National RTAP	Second Week	Annually
Emergency Procedures for Rural Transit Drivers	National RTAP	Second Week	Annually
Customer Driver Service	National RAP	Second Week	Annually

Creating a Dispatcher/Scheduler Workspace

Documents to keep close by:

- Agency policies and procedures (tab the specific ones you refer to often)
- Sample scripts/language to use with challenging customers
- Contact information for volunteer driving organizations and taxi companies that offer services that your agency doesn't provide
- Contact information for social service organizations, the library, and other organizations that serve transit-oriented customers
- Contact information for transit agencies from nearby communities (in case a regional trip needs to be coordinated)
- Pictures or quotes that make you smile – you will sometimes need a positive reminder when you are on the phone

Encouraging a Teamwork

- Regular meetings that include the driver, dispatchers and schedulers
- Daily check-ins that include operations manager/staff, dispatchers and schedulers
- Cross training (or job shadowing)
- Emergency scenario training
- Training on appropriate use of the two-way radio

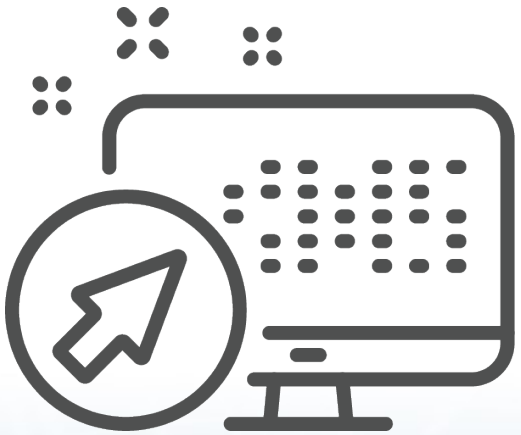


Technology - Off-the-Shelf Applications

- Off-the-shelf applications are easily accessible and cost effective.
- Common off-the-shelf applications in the transit industry include:
  - Spreadsheet and database applications
  - Shared-document applications
  - Calendar applications



Technology - Proprietary Applications



- The number and uses of proprietary transit applications is growing quickly.
- In general, the applications can be used by agencies to:
  - Collection and retention of passenger information
  - Computer-aided route and schedule building
  - Automated transmission of schedules to drivers and dispatch
  - Change and cancellation management and re-routing/scheduling
  - Quick reference to vehicle routes and schedules in real time

Benefits of Integration and Automation

- Configure maximum travel times by trip purpose or funding source.
- Highlight for a scheduler's review multiple trips booked to arrive at or depart from the same address within 30 minutes.
- Automatically flag requests from passengers who have been suspended and block bookings during the period of suspension.
- Track historical travel times to provide more accurate estimated times.
- Highlight and resolve duplicate customer trip and customer file entries.
- Quickly identify trips that cannot be accommodated so they can be referred for taxi dispatch or alternative service

Transit Communication Systems

- There are many forms of communication between schedulers and dispatchers, including:
  - Voice communication via two-way radio
  - Voice communication via cellular phones
  - Mobile data terminals or tablets



Considerations when Choosing a Technology Solution

- What hardware might the agency need to run this technology?
- Will the agency need new computers, an additional server, or more cloud storage?
- Is the technology being considered a short-term solution or is it a long-term solution for issues the agency expects to face?

Considerations when Choosing a Technology Solution (Cont.)

- What is the plan for implementation?
- Is there adequate time/budget for training?
- Can staff be taken off shifts for training?
- Can vehicles be taken out of service to install in-vehicle items?
- Is there budget availability for annual operating costs?

Q&A Session

- Please type your question(s) into the Q&A box.



Thank You!

- The recording and slides will be posted to nationalrtap.org/webinars.
- Please fill out the brief survey after the webinar.
- If you have any questions or need assistance, please contact us at info@nationalrtap.org or 888-589-6821.