

# The Wingspread Conference On Transportation for People with Disabilities

## Action Agenda

August 2002

### Introduction

In July 2002, a statewide conference on transportation for people with disabilities convened at the Wingspread Conference Center in Racine Wisconsin. The overall purpose of the conference was to develop an action agenda to affect systems change in specialized transportation in Wisconsin. Systems change is important because it would create improved transportation opportunities for seniors and persons with disabilities. Improved transportation opportunities would make it possible for people to live more independently and participate more fully in community life. "Transportation connects people to life" is more than just a clever motto.

The Aging Network Operations Section, Bureau of Aging and Long Term Care Resources, Department of Health and Family Services planned and organized the conference with input from a variety of stakeholders across the state. Leaders in transportation and human service areas were invited to participate in the conference.<sup>1</sup> The Johnson Foundation co-sponsored the conference at Wingspread and provided the perfect atmosphere and support for the important work accomplished by the participants. One major outcome of the conference is this Action Agenda.

Included, as part of the Agenda, is a description and documentation of the process used by conference participants to arrive at action agenda items. As is often the case, the process is as important as the outcome.

### Purpose

The overall purpose of the conference was to address the condition of specialized transportation in Wisconsin, gather existing research and writings on these topics, and produce an action agenda for legislative and systemic change.

This seminal gathering of leaders in human service and transportation fields addressed three major objectives.

#### **1. Review and identify barriers to coordination/consolidation of transportation systems**

The goal of this workgroup will be to determine if coordination/consolidation of funds is feasible. Furthermore, they will explore the concept of multi-county regional systems

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<sup>1</sup> A list of participants is included as Attachment A.

that would provide for more cost-efficient services without sacrificing the specialized services needed by older people and people with disabilities.

**2. Identify barriers and solutions to insurance and employment/volunteer issues that prevent additional providers from entering transportation market and existing providers from coordinating with other groups**

Goal of this workgroup will be to determine what other states have done to resolve some of these issues and see what examples could be replicated in Wisconsin. They will also look for best practices within the state.

**3. Identify barriers and solutions to workforce issues that discourage providers from entering the transportation market and existing providers from staying in the market.**

- ✓ Identify legislative changes that would encourage multi-county, regional systems. (tax incentives, etc.)
- ✓ Workforce issues - finding and retaining both professional and volunteer drivers in an ever shrinking employment pool
- ✓ Exploring what have been effective driver training practices
- ✓ Exploring creative solutions - (cooperatives, consumer-owned companies, etc.)
- ✓ Explore ways to ensure existing laws (ADA) are enforced

**Goal of this workgroup will be to explore best practices for workforce recruitment and retention and recommend ways to eliminate some of the existing barriers.**

**Process**

The Conference started with a plenary session on the afternoon of July 23, 2002, which was devoted to a round robin session where participants were asked to introduce themselves, share how they were involved with transportation and one thing they would like to see come from the Conference. The following list of desired outcomes is a summary of this introductory session.

1. Assure that rural counties/providers are taken into consideration
2. The group sets clear goals to work on legislative changes
3. Develop good public policy that makes sense
4. Assure fair and just representation for consumers—their voice is not always heard by policy makers
5. Constructive legislative ideas for all providers—shared views and values
6. Preservation of providers both private and public
7. Coordination and cooperation between public and private entities
8. Ideas for ways to coordinate training state-wide
9. Ideas for ways to make system better and share with transportation task force—looking for better ways to coordinate transportation needs

10. Direction for DOT administrators—coordination and consolidation efficiencies
11. Assurances that dollars spent are well spent—most bang for the buck
12. Coordinate between agencies and providers and identify needs
13. Good public policy for mobility regardless of age
14. Multi-county responsive system for all people who need transportation
15. Break down barriers to specialized transportation—too fragmented. Why does it have to be specialized?
16. Develop trust between all people and agencies we represent
17. One united voice to speak for changes in the current system—eliminate “silos”
18. Look at the big picture and break down barriers
19. A system that values and maximizes volunteers
20. Systems change—find a state-wide solution and share information
21. Tackle insurance issues

As can be seen from the above list there are several themes in the comments that dovetail with the objectives of the Conference.

On Wednesday July 24, the group met in plenary session to hear a presentation by Robert P. Schmitt on the Pennsylvania experience with systems change in transportation. This served as a segue to a discussion of the purpose and format of the day’s activities.

Each participant was assigned to one of the following three work groups:

### **Group 1—Coordination and Consolidation**

*Facilitators: Dave Lowe and Gail Schwersenska*

Susan Larson	Ivory Peoples
Diane Maculan	Tim Aheehan
Eileen McRae	Diane Poole

### **Group 2—Workforce and Volunteers**

*Facilitator: Jim Schmidkofer*

John Doherty	Richard Hall
Scott Durren	Noreen Kuroski
Carol Eschner	Judy Lindholm
Ed Filemyr	Stephanie Sue Stein

### **Group 3—Insurance and Risk Management**

*Facilitator: Barbara Thoni*

Tom Frazier	Phil Kress
Kevin Gabriel	Larry Lansing
Gary Goyke	Mark Jones

Each group identified problems, issues, developed recommendations, and solutions for presentation later in the day. Groups deliberated all morning. After lunch, the groups reconvened and focused on developing recommendations to the general session. At 4:30 each group presented their findings in a plenary session facilitated by Robert Schmitt. The recommendations are presented as part of the Action Agenda.

On Thursday morning, the group reconvened to develop an action agenda. The process used here was to review the recommendations and action items produced by the groups the previous day and subject each item to the following fundamental questions?

### **Fundamental Questions**

- 1. Is it really worth doing, that is, will it produce a result that leads to improved transportation opportunities for consumers?**
- 2. What resources are needed to achieve the result?**
- 3. Who will be responsible for getting it done? Who will be the champion?**
- 4. By when will it be completed?**

Throughout the morning the group developed the Action Agenda described in the next section.

### **Action Agenda Elements**

As part of the process of developing the Action Agenda the group decided to refer to themselves as the Wingspread Transportation Group. They also adopted the mantra, “People getting to where they want to go.”

The Action Agenda is organized by work group topic as follows:

#### ***Topic Area: Coordination/Consolidation***

##### **Action Items:**

- 1. Needs Assessment/Transportation Inventory**—this item refers to the need to know more about the unmet transportation needs and the inventory of transportation services available. **The group felt that several studies have been done and that what is needed, at this point, is to collect this information and to synthesize it into a “picture” of the status of transportation for seniors and people with disabilities in Wisconsin.** After this, the group will be in a better position to determine if additional assessments and inventories are needed.

**Part of this action item is to write a letter to the Secretary of Transportation requesting that the Department complete its strategic plan by June 30, 2003 and to include in that plan consideration for improved transportation for people with disabilities and seniors. Also include a request to inventory public transportation in Wisconsin.**

**Team:**                   **Scott Durren, Leader**  
                                 **Dave Lowe**  
                                 **Rick Hall**  
                                 **Tim Sheehan**  
                                 **Gail Schwersenska**

**By When:**               **October 31, 2002**

- 2. Convene Interagency Transportation Work Group**—This involves establishing regular meetings of state agencies such as DOT, DHFS, etc. to explore legislative and policy issues that may need to be changed in order to improve transportation. The work group would take up the following issues:
  - **Expansion of 85.21 trust fund to permit use for coordination planning.**
  - **Consider the possibility of requiring, under 85.21, that the local Transportation Coordinating Committees meet on a regular basis and that they include consumer input.**
  - **Explore other issues that act as barriers to improved transportation for people with disabilities and seniors (ongoing task).**

**Team:**                   **Gail Schwersenska, Leader**  
                                 **Diane Poole**  
                                 **Dave Lowe**  
                                 **Scott Durren**  
                                 **Diane Maculan**  
                                 **Phil Kress**  
                                 **(Don Chatfield)**

**By When:**               **September 30, 2002**

- 3. Recommend Pilot project on central dispatch and/or brokerage**—The group felt that central dispatching and the concept of transportation brokerage has considerable potential for using existing funds more effectively and improving service quality.
- 4. Recommend Pilot to test Regional Transit Authority model**—The group also felt that a regional transit authority (or other regional entity) has potential for delivering

better service to a larger area that allows people to travel across county boundaries. Part of this item is to do research on the needed changes in state law to permit authorities.

Both of these items (3 and 4) are to be discussed by the Interagency workgroup and WISDOT.

**Team:**           **Diane Poole, Leader**  
                      **Dave Lowe**  
                      **Mark Jones**  
                      **Kevin Gabriel**  
                      **Consumer advocate (TBA)**

**By When:**      **October 31, 2002**

- 5. Compile transportation best practices from other locations in areas of dispatching, vouchers, and new models of service delivery**—This is an item everyone agreed to participate in by sending any information they have to the team leader (items 3&4). It consists of scouring the usual sources of information such as Project Action, National Cooperative Transit Research Program, APTA, CTAA, etc. to identify best practices in other areas.
- 6. Use of technology and equipment to enhance efficiency & increase productivity**—Explore technological possibilities to improve service; develop real-time communications between riders, drivers and dispatchers. This involves acquiring information on places that have used technology to improve services using similar sources of information to those listed in § item 5.
- 7. Develop a service model that matches customer demands with equipment and staff**—This item is also included in this teams work.

**Team:**           **Tom Sheehan, Leader**  
                      **Sue Larson**

**By When:**      **December 1, 2002**

***Topic Area: Insurance/Risk Management Work Group***

**Action Items:**

- 1. Request Joint hearings by Senate and Assembly Transportation Committees regarding transportation needs**—The request would be for hearings to be held around the state sometime in 2003 on the transportation needs of seniors and people with disabilities. This includes meeting with the new secretaries of WISDOT and DHFS to request support for hearings. If committees are not willing to have hearings, the Wingspread Transportation Group will hold their own hearings in Madison.

**Team:** Tom Frazier, Leader  
Gary Goyke  
Scott Durren  
Tim Sheehan

**By When:** January 31, 2003

- 2. Request Legislative Council to study issues—analyze safety, liability, drug & alcohol, training**—Include in this agencies such as OCI/DOT/DHFS/Consumers, providers. Before request is made the team needs to organize information on the magnitude of the issue so that a case can be made to the Legislative council to do the study. Much of the information gathered by other teams will be helpful.

**Team:** Gary Goyke, Leader  
Tom Frazier  
Scott Durren  
Tim Sheehan

**By When:** January 31, 2003

- 3. Create task force to determine alternate methods for providing transportation insurance and risk management**—The task force (Wisconsin Alternatives Task Force) will engage in the following activities:

- Identify funding source to study insurance alternatives (may require one full-time person for 6 months). Look to agencies, foundations to fund.
- Community Transportation Mutual Insurance Co. of Wisconsin. This is an example of a mutual that would be owned by provider members and currently allowed by law in Wisconsin. Task would be to explore feasibility as part of the study.
- TMICO—Transit Mutual Insurance Co. of Wisconsin (fixed-route providers). Talk with them to explore any possible areas of commonality and cooperation.
- Risk purchasing group—another alternative to explore.
- Best practices in WI and elsewhere—identify insurance best practices that may be helpful in addressing the insurance issues.

**Team:** Gary Goyke, Leader

**Tom Frazier  
Phil Kress  
Kevin Gabriel  
Mark Jones**

**By When: June 30, 2003**

***Topic Area: Workforce and Volunteers Work Group***

**Action Items:**

- 1. Develop a “picture” of the status of transportation in WI to advance the action agenda.** This is being handled by the team working on Needs Assessment/Transportation Inventory
  
- 2. Develop respected/valued workforce.** This involves the following:
  - Identify & disseminate training opportunities & work toward certification of drivers
  - Develop strategies to increase transportation employment opportunities
  - Reduce barriers to recruiting and retaining volunteer drivers
  - Explore innovative sources, outreach methods that target new populations for vol. & paid workers
  - Promote the use of rewards and recognition for staff

**Team: Sue Larson, Leader  
Carol Eschner  
Jim Schmidlkofer  
John Doherty**

**By When: December 1, 2002**

- 3. Convince government that public transp. \$ should meet everyone’s travel needs**—This item responds to the need to educate local officials about the importance of transportation in the lives of local citizens. It involves getting a list of local organizations’ meeting dates and the name of a contact person who deals with transportation. The list will include organizations such as the League of Municipalities, Wisconsin Towns Association, etc. The idea is for conference participants to either attend or enroll someone else to attend these meetings and request support for transportation improvements. The results of these efforts will be reported at the annual transit conference.

**Team: Gary Goyke, Leader**

**Mark Jones**

**By When: March 1, 2003**

- 4. Convince employers that meeting transp. needs of employees is in their (employers) best interest**—Three groups were mentioned as important to this item. They are Wisconsin Manufactures and Commerce, Chambers of Commerce, and the Department of Workforce Development. The task here is to take the outcomes from the Wingspread conference to formulate a strategy or policy paper, which would be presented to the Business Leadership Network. The purpose is to use this information to approach employers for their support.

**Team: Rich Hall, Leader**

**By When: March 1, 2003**

## **A Structure for Fulfillment**

The final group discussion was devoted to devising a structure to support the achievement of the action agenda items. The following questions were considered:

### **How will individuals in this group communicate after Wingspread?**

Jim Schmidlkofer will set up a Wingspread Transportation Group listserv on an independent server. Conference participants can use this listserv to communicate and share information such as reports on transportation. The listserv will be available in September 2002.

### **Who will be the leader(s)?**

Gail Schwersenska agreed to be the leader of the Wingspread Transportation Group.

### **How will you handle breakdowns?**

The group felt that breakdowns in progress would be handled through communication on the listserv, by general agreement among the group and the published action agenda.

### **Who will be accountable to whom?**

By agreement, team members will communicate with the team leader and the team leaders will communicate with Gail.

### **How will you measure progress and results?**

Tim Sheehan asked for three volunteers to establish benchmarks and devise ways to measure outcomes and results. Members of this team include:

Tim Sheehan, Leader  
Sue Larson  
Scott Durren  
Jim Schmidlkofer

The group also discussed a second meeting, possibly in the spring, to evaluate progress and to include other organizations in the process. Organizations mentioned included Business Leadership Network, Survival Coalition, UCP, the DD Council, and the Wisconsin Coalition for Advocacy.

## **Closing Comments**

At the conclusion of the conference, participants were given the opportunity to share their thoughts on the conference.

- I got a sense that I am not alone, that there are other people who care about this issue and this is empowering.
- I want to thank everybody for being here. In working with consumers, a major concern is whether or not people really care about how they (consumers) get to places they need to go. This experience, and the commitment of people here, has been encouraging. People will no longer feel alone.
- This is an important first step. Now we have important responsibilities to carry this forward. It is good to see everyone being of “one mind” on this important issue.
- After working on this issue for many years, we finally have some specific objectives/actions that we can work on together.
- The creativity of being part of this group was invigorating.
- We now have partners working on common goals. It was a privilege to be here to participate in honest dialog. We need to trust and commit to this vision. The Johnson Foundation made this possible.
- It is good to have new partners to work with.
- All the energy coming together makes me feel stronger. Information from here will go home with me to be planted.
- Being here was a humbling experience. What the group is about reminds me of a quote from a commencement address some time ago, that seems to fit here. That you are “planting trees under whose shade you do not expect to sit.”
- I feel honored to be here with this group.

- It is so great to be here to re-invigorate my ideas, to reflect on the big picture.
- Wow! This conference was incredible. I thank Gail for inviting me.
- I am very glad I came. I learned so much and now see many opportunities for change.
- We can do this. We have set our own agenda instead of having others set it for us, which has happened all too often in the past. I want to thank everyone. I thank Wingspread as well. I go away more committed than ever. A phenomenal experience to do the things we said we'd do.
- The Wingspread staff was great. It is important to keep the focus on the people we serve.
- What a wonderful place to have a meeting like this. Thank you Wingspread.
- Volunteers play an important role in transportation. The use of volunteers needs to be encouraged and considered.
- Thanks to the planning committee—what passion they had. We have what we need to change the system. Being here reminds me of some advice I once heard that is related to our purpose. It is this:

Have a story  
 Know it well  
 Tell it often  
 Tell it whimsically  
 Get others to tell it

For us:                      We now have a story  
                                     We know it well  
                                     We need to tell it often  
                                     We need to tell it whimsically  
                                     We need to have others tell it

So that ten years from now we can say, “Remember that Wingspread Conference...”

- I want to thank Wingspread for doing such a great job and doing it so professionally.