Master of Science Management and Leadership
Capstone Report

Change Leadership During Innovation In A Transportation Nonprofit

Zoe DeVito

December 2019

Western Governors University

- Table of Contents -

Executive Summary

Private 501(3)(c) nonprofit, Via Mobility Services, provides paratransit services for older adults and people with disabilities in and around Boulder, Colorado. Although it provides a robust service of about 100,000 trips for 3,000 clients every year, Via denies trips to more than 2.5% of client requests every month. Challenges with Via's business operations contribute to the problem, partly because of the use of inefficient route planning software. Via can resolve the business operations problem by testing efficient software that automates some trip management functions. This solution begins with the implementation of a pilot project to test the new software and associated operational changes. If the pilot model is successful and helps Via overcome the problem, then it should replace Via's historical operations model.

Client relationship management also contributes to the problem because trip denials and inflexible planning are frustrating to clients. Besides implementing the pilot and increasing trip management flexibility, enhancing Via's Riders' Advisory Council can help resolve the issue. Not only will such a council engage clients, but it will also allow clients to guide the development of the pilot and other services and solutions. Another contributing factor to the problem involves organizational change management. While some employees are eager to change, others take pride in their work and Via's long-standing human services contribution to the community, and are not prepared to change. This conflict creates roadblocks in implementing the pilot, but listening and communicating may resolve these differences. In the long term, the recommended solutions may positively influence Via's return on investment and social return on

investment. Via might also experience the growth of its employees, fleet, and Riders' Advisory Council membership, and client base.

Background

This year, Via Mobility Services (Via) is celebrating its 40th anniversary of providing paratransit service for older adults and people with disabilities in and around Boulder County, Colorado. Paratransit is a door-through-door transportation service in an accessible vehicle with a trained and supportive driver. In line with typical nonprofit culture, most of Via's employees are invested in the mission to "enhance the independence of older adults and people with disabilities with mobility options" (Via Mobility Services, 2018b). Via is a private, 501(3)(c) nonprofit organization governed by a 15-member board of directors. Other leaders include the Chief Executive Officer (CEO), Chief Financial Officer (CFO), Director of Operations of Paratransit Service, and several other department heads. The structure is a hierarchy, with authority and control in the hands of leaders like the CEO and department heads (Tharp, 2009). Then, managers, supervisors, and front-line employees fill the ranks. Of its approximately 300 employees, about 90% work full time.

Via's target markets are older adults and adults with disabilities who can not or choose not to drive a personal vehicle. By 2030, every Baby Boomer will be older than age 65, and one in every five Americans will be of retirement age (U.S. Census Bureau, 2018). During this time, many Baby Boomers will stop driving and owning a personal vehicle. Boulder County, which coincides with Via's primary service area, is a hotspot for aging Baby Boomers. More specifically, by 2030, more than one in every five Boulder County residents will be 60 years old

and older (Boulder County Aging Services Division, 2015). Via is currently operating at capacity, serving about 3,000 clients with a little more than 100,000 paratransit trips every year; However, Via only meets a fraction of the growing market demand. No direct competitors exist in Via's service area territory, meaning that the unserved populations are not receiving the mobility services that they need, contributing to a local human services crisis.

Via is a large nonprofit. Its annual budget is about $22 million, $6 million of which supports the paratransit program. Historically, Via anticipates running its paratransit program at a deficit. Private donations, earned-income contracts (EICs), and grant funding sources fill the financial gap. In addition to Via's headquarters in Boulder, it also operates a satellite facility in Denver, dedicated to a significant EIC. In recent years, the average cost per paratransit trip has risen while private donations, EICs, and grant funding has remained relatively flat. At the same time, the demand for service is higher than ever, especially given the community's historically large and aging population of Baby Boomers who do not drive.

Currently, Via's Community Engagement and Business Development Officer is leading the research and development (R&D) phase of a new, potentially more efficient, paratransit operations model. As the Change Champion of the pilot, the officer delegates R&D tasks to two subordinates in the Business Development department, and garners support and resources from other department leaders. The Change Champion and a subordinate participate in a committee facilitated by the county to develop training material for older adults and anticipates leveraging the resources for training its clients for the pilot. Plans toward launching the pilot are in development, with the Change Champion anticipating launching in 2020.

Business Challenge

Via's goal is to maintain a monthly paratransit trip denial rate of 2.5% or less. Monthly paratransit trip denials rates rose in 2018 and continue growing beyond the goal, up to 5.67%, in the Boulder service area (Via Mobility Services, 2019c). One contributing factor to the challenge is inefficient operations software that requires time-consuming manual intervention to manage. Another factor is the rapidly growing aging population of Baby Boomers generating demand that Via is not currently meeting. Also, the rising demand for town-to-town trips requires the expenditure of more resources compared to in-town trips that were more popular in the past and contributes to the challenge.

Business Operations

Leadership Analysis

In most service areas, Via does not achieve its monthly denial rate goal. The business operations problem stems partly from inefficient operations software, causing Via to operate at capacity and not scale to meet its target market's demand for service. Instead of fixing symptoms, it is crucial to solve the problem at the root cause. According to Andersen and Fagerhaug (2006), "root cause analysis is a structured investigation that aims to identify the true cause of a problem and the actions necessary to eliminate it." Root cause analysis describes a variety of tools and techniques used to solve business problems, for example, brainstorming, data collection and analysis, and implementing a solution. Flow charts are useful for root cause

analysis, like those in Appendix C describing Via's current processes for its paratransit service. There are two flow charts, one describing the processes of scheduling and managing trips one to seven days before service, and the other describing different day-of service processes.

Via's ability to meet the demand for service is restricted in part by its trip management software, which requires manual intervention from staff. Processes begin when a client (Rider) speaks with one of Via's reservationists on the phone to request a paratransit trip one to seven days in advance of service. The reservationist enters the trip request information into the database. In turn, the scheduling software answers the question: Can the trip request be accommodated? If it can, then the new trip is entered into a database with pre-existing trips. The schedule of trips in the database populates a daily manifest (route plans) for drivers to fulfill the trip requests.

If an initial trip request cannot be accommodated, then the reservationist puts it on a waitlist. If changes are made to the existing schedules, and a waitlist trip can be accommodated, then the reservationist calls the rider back to confirm whether or not their request is still valid. If it is, then the trip is scheduled and added to an employee driver's manifest of trips. However, if the request is no longer valid or has expired, then it is put into a denial list. Most unaccommodated trips are placed on a waitlist until they definitively cannot be accommodated, and then are placed on the denial list. Considering that service demand varies month-by-month and demonstrates a seasonal trend, Via provides about 8,000 trips every month and denies around 350, resulting in an average 4.4% trip denial rate (L. Bitzer, personal communication, October 23, 2019). The denial rate in any given service area is typically above Via's goal of 2.5% or less a month.

On the day of service (and if there are no changes to the manifest), drivers fulfill trip requests as planned in the manifest. A variety of changes typically occur during service, whether the cause is from unexpected traffic delays, a rider not showing up for a scheduled pick up, a vehicle experiencing an accident or other day-to-day situations. Dispatchers track changes in real-time, approving changes in the database and relaying them to drivers as they are on the road using a 2-way radio system. If no changes occur, then the driver fulfills the manifest as-is, although that is an atypical situation.

Recommendations

The core issue with the current software used for business operations is inefficiency resulting in the denial of more than 2.5% of all paratransit trip requests every month. Via's Change Champion, the Community Engagement and Business Development Officer, is attempting to solve the problem by developing a pilot to test a new operations software that might increase operational efficiency. The Change Champion anticipates that new software will achieve increased efficiency by automating processes and reducing the amount of manual intervention required from staff. The idea is that Via can provide more trips and achieve its target monthly denial rate if its employees spend less time managing changes with daily operations. Refer to Appendix D for a flow chart associated with the pilot's processes.

The new processes reduce the amount of manual intervention required compared with Via's historical operations. One of the most noticeable changes is the automation of waitlist processes. Reservationists neither need to think about whether a waitlisted request will fit into a changing schedule, nor have to call clients to confirm if their trip request is still valid. Instead, all trip requests and changes populate in a database, and the new software program determines

which trips are scheduled for every driver using autonomous dispatching. However, some clients are not able to easily use a computer or smartphone and will require manual help from a live reservationist by phone, like they do today. Differing dramatically from Via's current operational processes, another prominent change is the lax of time restrictions on planning. Where Via's current processes require that clients schedule trips up to a week in advance, the pilot is more flexible, allowing same-day requests and long-term scheduling up to one year in advance. Also, while clients can still call in a trip request, the new model increases their options to manage trips online or using an application on their smartphone. The pilot's processes also eliminate the need for unique day-of service processes, as shown in Appendix C Figure B.

The new software creates hyper-efficient schedules for drivers in-real time − a significant difference from current operations − compared to current operations where drivers receive a daily, written manifest. During a service day, dispatchers monitor changes while vehicles are on the road, communicating with drivers to help them adapt. The new software removes the dispatcher from that role, replacing them with automated re-scheduling based on vehicle GPS positioning, rider needs, and other information. The software continuously communicates with vehicles as they are in service. A significant difference for drivers is the change from a written manifest received the day before service to instructions in real-time, more similarly to how an Uber driver sees trip details.

One of leadership’s primary responsibilities is to the interaction of all functional areas required to maintain the business. If Via does not change, it may decline, overburdened by rising costs and an inability to serve the market demand. Launching the pilot is the first phase of a solution, followed by data collection and analysis, and − if evaluated as appropriate − the

adoption of the pilot's processes instead of Via's traditional operations model. The solution resolves the business operations problem because the pilot's model will theoretically allow Via to scale to the growing demand for paratransit service.

Implementation Resources

Activity	Resource	Additional Details	Hard/Soft Dollar Cost
License new operations software	Software IT Director	The IT Director will license the new operations software.	$100,000 Hard $, one-time cost A $20,000 licensing fee will apply every year after the first year.
Install new operations software on existing infrastructure	Software Tablets (one in every vehicle) Desktop computers (in call center) IT Director and Subordinate (Delegating leadership style)	The IT Director, with support from a subordinate, will install the new operations software on (1) the existing tablets used to display trip information in vehicles for drivers and (2) the existing computers in the call center.	N/A
Create and implement employee training	HR Manager, with input from all department leaders (Supporting leadership style) Training department employees (Coaching leadership style)	The HR Manager will lead the development of employee training on how to use the new software. Input from all department leaders is key to developing effective training. Then, employees from the	N/A

	Meeting room	Training department will coordinate employee training sessions.	

Client Relationship Management

Leadership Analysis

Client relationship management (CRM) is a leadership responsibility that is adversely impacted by the business challenge. The limitation of the operations software is correlated with a negative experience for clients because they do not receive the level of service that they want. Trip request denials are increasing because of the substantial rising demand for paratransit service, making it difficult for Via to keep the monthly denials of all trip requests under the maximum goal of 2.5%. For example, in 2018, the denial rate in Via's primary service area, Boulder, varied between 1.73% and 5.67% every month (Via Mobility Services, 2019c). In rural mountain communities, trip denials tipped over 10% in certain months, adversely affecting ridership.

Via was successful in reducing the denial rate in a high-demand area by adding vehicles and brokering overflow calls to other local human services transportation resources in one of its primary service areas. Despite this, Via does not meet the demand for paratransit service in its territories. Via received this direct feedback from a client in a recent survey: "I am very grateful to Via, because in the past when I needed it the most got help. Lately, it is practically impossible to get a ride" (Via Mobility Services, 2018a).

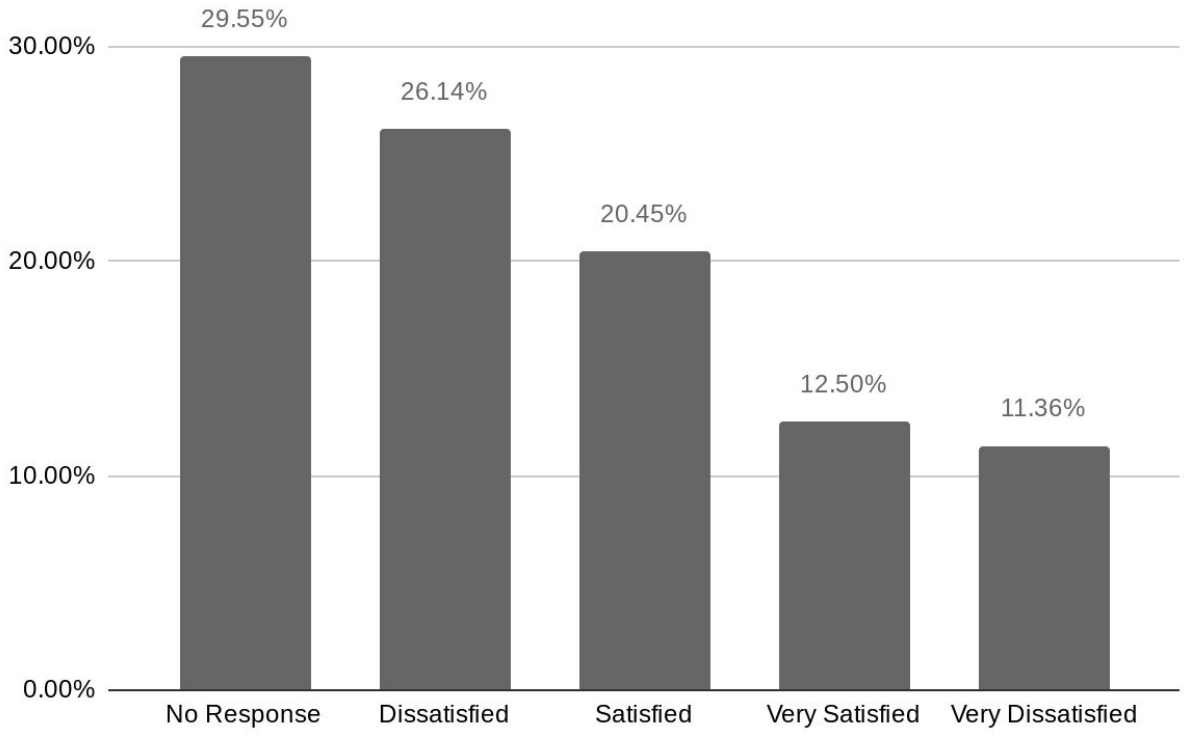

Figure A. Pareto Chart of Client and Caregiver Satisfaction with Via's Paratransit Service. Adapted from Via Mobility Services. (2018a). *Client and Caregiver Satisfaction Survey.* Internal Via Mobility Services report: unpublished.[1]

Same-day cancellations rose from 2017 to 2018 by 13.5%, creating availability for same-day trip requests (Via Mobility Services, 2019c). However, clients are rarely able to secure same-day ride requests. The demand for same-day ride requests is high because many riders, who are older adults or people with disabilities, need to gauge their ability to travel on a day-by-day basis. For example, some clients have a medical issue, and their doctor wants to see

[1] This informal survey shows ratings of satisfaction with Via's paratransit service. Notably, Via's formal biennial surveys, conducted every other year since 1999, measure client independence and self-sufficiency relating to Via Paratransit using a larger sample of clients. During the last survey in 2017, 98% of Via's clients agreed or strongly agreed that Via helps them to be more self-sufficient and 96% agreed or strongly agreed that we help them to be more independent; these statistics are up from 91% and 86% respectively from the 2015 report (Via Mobility Services, & National Research Center, 2018).

them that day. Others live with a long-term disability like chronic pain and experience a variety of pain levels every day. One rider shared in the same survey: "I have real problems with pain since I shattered my leg last December…I love the service, but I can never predict how I will feel on any given day. I would be so happy if I could phone you and ask for a ride the same day and know it has a good chance of happening. I can't use Via otherwise, knowing you have a punitive rule of canceling rides" (Via Mobility Services, 2018a). From some clients' perspectives, Via's service does not meet their needs.

Another reason why clients are dissatisfied is because of the service's limited connectivity between towns. Town-to-town services do not service all towns where clients want to travel, and the existing town-to-town services only operate a few days a week. A different rider from the survey shares: "...one of my main doctors is in Lafayette [several towns away from where I live], and you only go there once a week at certain times which means I may have to wait a long time for the ride home, and I can't get to the doctor on the days I need to for procedures" (Via Mobility Services, 2018a). Via's leaders have a responsibility to maintain relationships with their clients, but an inability to deliver service that meets clients' demands connects into the overall business problem.

Recommendations

Clients in every industry expect innovation (Berkovi, 2014), like Via's clients who want paratransit service with more flexible scheduling that meets their unique needs as people with limited mobility. Changing Via's service model is one significant way that Via is attempting to meet its clients' needs, as discussed in the previous section about Business Operations. Besides changing operations, another way that Via can strengthen its CRM is by inviting current clients

to participate in the development of services. Specifically, engaged clients who work together to research for a service-based firm results in increased client interest and net promoter score (Berkovi, 2014). Via currently engages with clients during regular “Town Hall” events, where the CEO and Business Development and Communications staff promote and host forums at libraries, senior centers, recreation centers, and other hotspots commonly visited by clients. During the Town Halls, clients share their experiences with the CEO, who listens and answers questions. Via’s clients, although frustrated with the limitations of the paratransit service, are forgiving and compassionate with its employees who demonstrate listening and good-faith efforts. One recommendation is to continue hosting Town Hall events.

Another solution is to leverage Berkovi's concept and further develop Via's Riders Advisory Council (RAC). RAC, established in the fourth quarter of 2018, is a group of Via's clients who engage in the development of the pilot. Through 2019, RAC grew to six members and represents a diversity of Via's clients, including people who live with disabilities like paralysis and blindness, those who have used Via's services for a temporary mobility limitation like knee surgery, and an adult with developmental disabilities and their caretakers. However, there are some barriers to entry into RAC, and the group does not represent all client segments. For example, quarterly meetings are scheduled from 3:00 p.m. to 4:00 p.m. on a weekday, but several clients who want to participate in RAC have day jobs and cannot join at that time. Via's service ends at 4:30 p.m. on weekdays, eliminating flexibility in accommodating client trips outside of work hours. Most of RAC's members use Via's paratransit service to get to and from meetings; Scheduling poses a challenge because of the current limitations of the service. Furthermore, RAC members who use Via's service pay a service fee to and from meetings,

creating a financial barrier for its clients, nearly 25% of whom live at or below the federal poverty level.

Solutions for overcoming these barriers start with expanding service hours and moving quarterly meetings to a weekday evening or other time that is more convenient for Via's clients. The adoption of the pilot operations model may make this possible. Increasing operational efficiency solves the problem of the limited availability of trips, thereby helping RAC members attend meetings, and all clients to have the flexibility that they want. Via may consider leveraging RAC and forming a sub-committee of clients who focus specifically on advocating the needs of other clients. For example, a RAC Relations sub-committee may interview and survey Via's clients, then make recommendations directly to the Director of Operations of Paratransit Service. Another sub-committee might train clients on how to use the pilot's trip management smartphone application. Also, offering RAC members a benefit, like free trips to and from meetings, makes them accessible, attractive, and facilitates relationship-building. Enhancing Via's RAC resolves the CRM problem because it uses direct feedback from clients to improve satisfaction with its services.

Implementation Resources

Activity	Resource	Additional Details	Hard/Soft Dollar Cost
Schedule quarterly meetings after normal work hours	Software Business Development department employees (Supporting leadership style)	The solution requires adopting the pilot operations model to expand service hours. Business Development department	$100,000 Hard $, one-time cost A $20,000 licensing fee will apply every year.

	Meeting room	employees create meeting agendas and prepare the meeting room.	No additional fees apply for using the meeting room.
Create RAC member benefits	Vouchers for 2 free one-way trips to and from meetings (Supporting leadership style)	At minimum, Via can offer RAC members free trips. Also consider asking strategic partners for benefits, like other rideshare service credits.	$90 Hard $ cost per member, recurring quarterly

Organizational Change Management

Leadership Analysis

Another leadership responsibility contributing to the business challenge involves resistance to change. Reasons why people resist change include that "people are familiar and comfortable with the way things are now, they fear change they believe might negatively impact them, and the process of change is poorly managed by the organization" (Okes, 2009). Some of Via's employees resist change, and the population is culturally split. One subculture is motivated by innovating the transportation industry, and another subculture is motivated by Via's historic paratransit program and perceives that Via needs to persist. The culture split is partly facilitated by the ineffective communication of plans surrounding the pilot, resulting in excitement for some and resistance from others. This division contributes to the overall business problem because resistance slows the progress of change and implementation of the pilot.

Employees who contribute to the ongoing R&D phase of the pilot are enthusiastic. The Community Engagement and Business Development Officer is the pilot's Change Champion,

advocating for the pilot and building the resources needed to test a new operations model. The Change Champion collaborates with other department leaders and the CEO who agree that something needs to change. The Director of Operations of Paratransit Service supports the pilot with feedback and resources but is concerned that it will not solve the business challenge. The pilot will launch within the City of Boulder and does not address operational inefficiencies caused by town-to-town trips (L. Bitzer, personal communication, October 23, 2019). While trips within city limits are typically between three and five miles long, town-to-town trips average fourteen miles, depleting significantly more fuel and time resources.

Also, some employees are concerned about the change, especially front-line drivers who may work in the pilot's designated service area. Those who are aware of the pilot have unanswered questions about how the changes will affect their roles. The pilot plans change frequently and are unclear, further facilitating confusion about the change. Neither a launch date nor a final project timeline is set, causing some employee's relevant questions to be unanswerable, like: When do we need to develop and launch employee training? Also, Via's employees have not yet had an opportunity to try the new software to learn how it functions and plan for relevant operational changes.

Recommendations

Via's leadership team can complete a collaborative interdepartmental change management plan for implementing the pilot. Lead by the Change Champion, department leaders will test the new software, finalize the pilot project timeline, and design, develop, and execute training. Organizational change management "involves recognizing that any change will meet some level of resistance and thus taking action to reduce or mediate it so the change will be more

successful and less stressful" (Okes, 2009). The inclusion of key internal stakeholders like department leaders will support the pilot's success. Examples of relevant actions include providing input in the project timeline and developing new policies and procedures. The Change Champion can strengthen the other department leader's support for the pilot by incorporating their operational pain points into the development of key performance indicators (KPIs).

KPIs are specific "measures that can be tied to a team or a cluster of teams working closely together for a common purpose"; They are goal-oriented and "give ownership" to people within the organization (Parmenter, 2015). Also, the Director's concerns about town-to-town trip inefficiencies are valid; Expanding the service area from the City of Boulder to Boulder County may accommodate high-demand town-to-town trips and increase Via's overall routing efficiency. Collaboratively creating indicators based on the goal of overcoming the operational challenges helps to resolve the change management obstacle. Furthermore, integrating a diversity of perspectives from people in the organization promotes the uncovering of additional problems, resources, and ideas about Via's operations that, when integrated into the change management plan, will buttress its success.

The recommendation above relates to horizontal trust between coworkers of approximate rank, and Via's leaders must also account for vertical trust between managers and employees. "Horizontal trust is the willingness of a worker to be vulnerable to the actions of coworkers, whose behavior and actions they cannot control...trust is also needed for knowledge acquisition and dissemination processes" (Krot and Lewicka, 2012). Successful change management requires thoughtful communication. Via's employee drivers and other staff need a high level of communication, including answering their questions and training them to prepare for success.

After Via's leaders reach consensus on the pilot plans, then they can effectively communicate changes with their subordinates. Questions from employees will form the basis of a Frequently Asked Questions document that is accessible to employees in break rooms and the online driver portal.

Answering questions is a critical component of communicating, as is engaging them with benevolence. According to Krot and Lewicka, benevolence has "the greatest effect on vertical trust between employees and managers" (2012). Examples of benevolent actions include favors, empathy, and willingness to account for others in decision-making processes. One way that Via can accomplish this is by inviting employees to participate in a launch party to celebrate the start of the pilot service, where leaders recognize staff members for the critical roles they play. Besides involving employees in the development of different aspects of the pilot, Via's leaders can facilitate the celebration helpful (even if critical) employee feedback, and objective results tracked by the KPIs, and milestones. Aligning and tracking employee goals with business goals also reinforces mutual partnerships between employees and managers.

Implementation Resources

Activity	Resource	Additional Details	Hard/Soft Dollar Cost
Create a Google Form survey for employees to submit feedback	Communications Manager, with input from all other department managers (Supporting leadership style) Google Forms	Communications Manager will design the survey and receive feedback from department leaders. Then they will create a FAQ based on the responses, publish it	N/A G-Suite Subscription Soft $, one-time cost

		online and post print outs in break rooms.	
Create a FAQ document based on feedback in the Google Form	Communications Manager (Supporting leadership style) Google Forms Google Docs	The FAQ should be updated every week as additional questions arise, continuing through the duration of the pilot.	$50 Printed copies Hard $, on-going cost as supplies are needed
Department leaders share information about the pilot with supervisors	Two computers Meeting rooms	Leaders share feedback survey with subordinates and directs them to two laptops in employee break room that can be used to access the FAQ form and document, as well as regular updates on the pilot. Department leaders present and answer questions at employee meetings.	$0 Computers exists prior to this project and employees already use them to access company information.
Host an inclusive launch party	Community Engagement and Business Development Officer, Directors of Operations, with support from subordinates (Supporting leadership style)	Staff from the Business Development department will plan the party and coordinate email invitations, a photographer, food and beverages, and door prizes for employees. They will use a PA system to	$1,000 Hard $ cost, variable and possibly covered by sponsors

	MailChimp (email blast) Photographer Food and beverages Door prizes for employees PA system Party room	announce information about the pilot, answer questions, and recognizing staff, especially those affected by the pilot.	
Develop a feedback/rewards system	HR Manager, with input from all department leaders (Supporting leadership style)	An effective feedback/rewards system aligns employee goals with business goals.	$0 No cost, unless hiring a third-party consultant to help develop the feedback/rewards system.
Develop key performance indicators	Meeting Room with a white board and markers Director of Operations and Business Development, Community Engagement Officer (Supporting leadership style)	Director of Operations and Community Engagement and Business Development Officer discuss operational pain points and accept responsibility for different parts of the pilot.	$0 No cost, unless hiring a third-party consultant to help facilitate meetings with the directors.

Long-Term Organizational Impacts

Via's mission service does not yield a positive return on investment (ROI) and plans to operate the program at an annual deficit. Although Via could make money on the paratransit program, it provides more trips at cost to serve a larger population of older adults and people with disabilities in the community (B. Patterson, personal communication, November 18, 2019). Clients pay a $5.00 fare for trip in-town and $10 to ride from one town to another (Via Mobility Services, 2019e). Some clients pay a reduced fare, and more than 20% qualify for free rides because they live at or below the federal poverty level (Via Mobility Services, 2019a). The fare is a modest fraction of the actual cost of operating the service; Via's average cost per paratransit trip was $33.45 in 2018 and rose to $46.00[2] in 2019 (Via Mobility Services, 2019a). Fuel, maintenance, and employee salaries are the primary costs associated with trips, all of which are becoming more expensive every year. The operational inefficiencies caused by the software and resource-draining town-to-town trips contribute to Via's average clients served per hour: 2.28 clients per hour year-to-date in 2019 (Via Mobility Services, 2019d). During the pilot, Via aims to triple the average clients served per hour, reducing the average cost per trip to about $15.34. If the average cost per trip continues rising with the trend, then Via will also need to continue scaling the number of clients served per hour to keep operating costs low.

Instead of using ROI, nonprofits can determine their social return on investment (SROI), a tool that "shows the double bottom line: the financial impact and the social impact" (Stombaugh, 2019). Although Via's SROI is not published, the social impacts of Via's paratransit

[2] $46.00 is an estimate; The actual average cost per trip will be published in Via's 2019 Annual Report.

service are meaningful and valuable to society, like reducing and preventing the social isolation of older adults. Flowers et al. (2019) "found that a lack of social contacts among older adults is associated with an estimated $6.7 billion in additional Medicare spending annually." Social isolation also is correlated with health risks like increased mortality (American Cancer Society, 2018), which Via's transportation services mitigate.

Vias' paratransit service includes trips to hospitals and other medical facilities like dialysis centers. According to the Metro Denver Economic Development Corporation (2018), "for every dollar spent at a Colorado hospital, two dollars were generated for the broader Colorado economy, creating $33 billion in total economic activity." These activities will increase significantly over the next few decades as the Baby Boomers age. Via also provides a connection with family and friends, recreation centers, and other vital social resources. Not only that, but Via's clients develop relationships with drivers and other riders, like Kati P., who shares, "I felt there's a little community on this bus that I needed to explore" (Gomez, 2016). Vias' paratransit service contributes value to a vulnerable individual's wellbeing and the local healthcare industry. It also brings clients to retail shopping centers, places of worship, work, recreation centers, and other locations. Even though the ROI of the paratransit program is negative, the SROI is excellent. It may be worthwhile to calculate Via's SROI and leverage it to attract new donors.

If the pilot is successful and the operations model replaces Via's current paratransit processes, then the fleet will require additional vehicles to keep up with the rising demand for service. In the next two to five years (after the pilot is completed in December 2020), Via will need to acquire more vehicles through federal capital grants, private donations, or purchase at a dealership. While Via already procures vehicles using these sources, there is a need to

accumulate enough high-quality sources to secure the funding needed to purchase more and more new vehicles every year as the paratransit service grows. Via may consider expanding the Business Development department lead by the Change Champion by hiring additional grant writers, donor relations coordinators, and other fundraisers. Increasing efforts to secure new funding sources, like private foundations, is necessary to amass the financial resources needed to expand the fleet continually.

Via's personnel is growing at a rate of 4% every year (Via Mobility Services, 2019b). The turnover rate was 30.3% over the last 12 months, with the most turnover occurring with new drivers within the first six months of employment; While the rate is high, it is less than the 47.3% industry benchmark (Via Mobility Services, 2019b). The average tenure for Via employees is 5.2 years, conveying the idea that employees who make it past the six-month milestone stick around. If Via adopts the pilot's operations model, they can reasonably expect the personnel growth rate to rise, especially for driver staff. However, the number of reservationists and dispatchers, whose workload may decline with the use of automation, will not grow but fall. Via's hiring managers may anticipate losing reservationist and dispatch staff by attrition and may continue replacing on an as-needed basis.

In the next few years, Via may realize that RAC members also stay engaged, like its long-term employees. As RAC influences the development of the pilot by helping to tailor Via's paratransit service with its target market's needs, the group may change. RAC may transform from making recommendations to collaboratively developing the business with activities like establishing measurement standards for Via's SROI and working with tenured staff to collaboratively develop solutions to operational challenges. RAC will continue contributing

feedback and promotion of its services. In turn, RAC members will gain insight into Via's strategy, community with other clients, and access to Via's employees who are dedicated to serving them.

References

American Cancer Society. (2018, November 16). *Social isolation linked to higher risk of death.* ScienceDaily. Retrieved November 18, 2019 from www.sciencedaily.com/releases/2018/11/181116110632.htm

Andersen, B., & Fagerhaug, T. (2006). *Root cause analysis : simplified tools and techniques.* ASQ Quality Press. Retrieved from http://search.ebscohost.com.wgu.idm.oclc.org/login.aspx?direct=true&db=cat07141a&AN=ebc.EBC1884171&site=eds-live&scope=site

Berkovi, J. (2014). *Effective Client Management in Professional Services : How to Build Successful Client Relationships.* Farnham, Surrey, England: Routledge. Retrieved from http://search.ebscohost.com.wgu.idm.oclc.org/login.aspx?direct=true&db=nlebk&AN=841524&site=eds-live&scope=site

Boulder County Aging Services Division. (2015). *Boulder County Aging Services Area Plan* [PDF]. Retrieved January 16, 2019, from https://assets.bouldercounty.org/wp-content/uploads/2017/03/aaa-area-plan-2011-2015.pdf

Flowers, L., Houser, A., Noel-Miller, C., Shaw, J., Bhattacharya, J., Schoemaker, L., & Farid, M. (2017). *Medicare Spends More on Socially Isolated Older Adults.* AARP Public Policy Institute. doi: 10.26419/ppi.00016.001

Gomez, R. (2016). *Kati P., age 89* [Photograph]. Boulder, CO: Via Mobility Services.

Krot, K., & Lewicka, D. (2012). *The Importance of Trust in Manager-Employee Relationships*. International Journal of Electronic Business Management, 10(3), 224. Retrieved from http://search.ebscohost.com.wgu.idm.oclc.org/login.aspx?direct=true&db=edb&AN=83524838&site=eds-live&scope=site

Metro Denver Economic Development Corporation. (2018, February). PDF. Denver.

Okes, D. (2009). *Root cause analysis : The core of problem solving and corrective action*. Retrieved from https://ebookcentral.proquest.com

Parmenter, D. (2015). *Key performance indicators : developing, implementing, and using winning KPIs.* Wiley. Retrieved from

http://search.ebscohost.com.wgu.idm.oclc.org/login.aspx?direct=true&db=cat07141a&AN=ebc.EBC1895928&site=eds-live&scope=site

Stombaugh, H. (2019, July 13). *How to Use SROI to Show Nonprofit Impact*. Retrieved November 17, 2019, from https://www.thebalancesmb.com/using-sroi-to-show-your-nonprofit-s-impact-2501977.

Tharp, B. (2009). *Four Organizational Culture Types*. [PDF]. Retrieved October 5, 2019, from https://pdfs.semanticscholar.org/b0e2/fd342fcf402920e264f15070276b79be1e25.pdf

U.S. Census Bureau. (2018). *Older People Projected to Outnumber Children for First Time in U.S. History*. Retrieved January 16, 2019, from https://www.census.gov/newsroom/press-releases/2018/cb18-41-population-projections.html

Via Mobility Services. (2019a). *2018 Annual Report to the Community*. 2018 Annual Report to the Community. Boulder, CO.

Retrieved from https://indd.adobe.com/view/b6bb331a-8f23-4b23-a16f-2968aa3c8d41

Via Mobility Services. (2018a). *Client and Caregiver Satisfaction Survey.* Internal Via Mobility Services report: unpublished.

About 5% of Via's clients and caregivers (176 individuals) responded to a survey about their overall satisfaction with it's paratransit service.

Via Mobility Services. (2018b). *Mission and History*. Retrieved November 18, 2019, from https://viacolorado.org/about/mission-and-history/.

Via Mobility Services. (2019b). *Paylocity Employee Report*. Internal Via Mobility Services report: unpublished.

Via Mobility Services. (2019c). *RouteMatch Denial Rate Report*. Internal Via Mobility Services report: unpublished.

Via Mobility Services. (2019d). *RouteMatch Executive Summary Report for January 1, 2019 to November 16, 2019*. Internal Via Mobility Services report: unpublished.

Via Mobility Services. (2019e). *Transportation Services*. Boulder, CO.

Via Mobility Services, & National Research Center. (2018). *Via Mobility Services 2017 Rider Survey*. Boulder, CO.

Appendix A

[redacted]

Appendix B

[redacted]

Appendix C

Flow Charts of Via's Current Processes

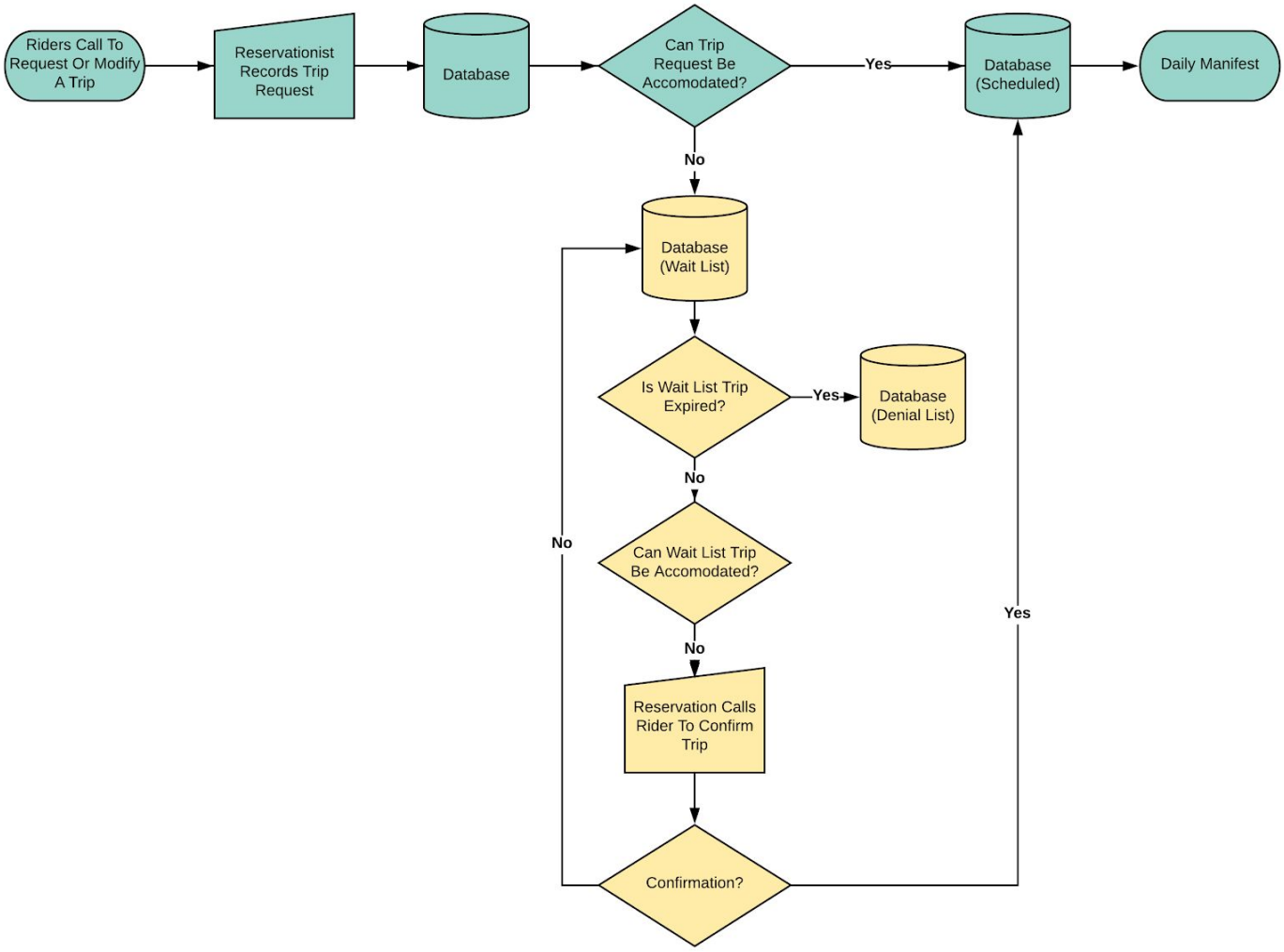

Figure A. Via's Current Processes To Manage Paratransit Trips (1-7 Days In Advance Of Service).

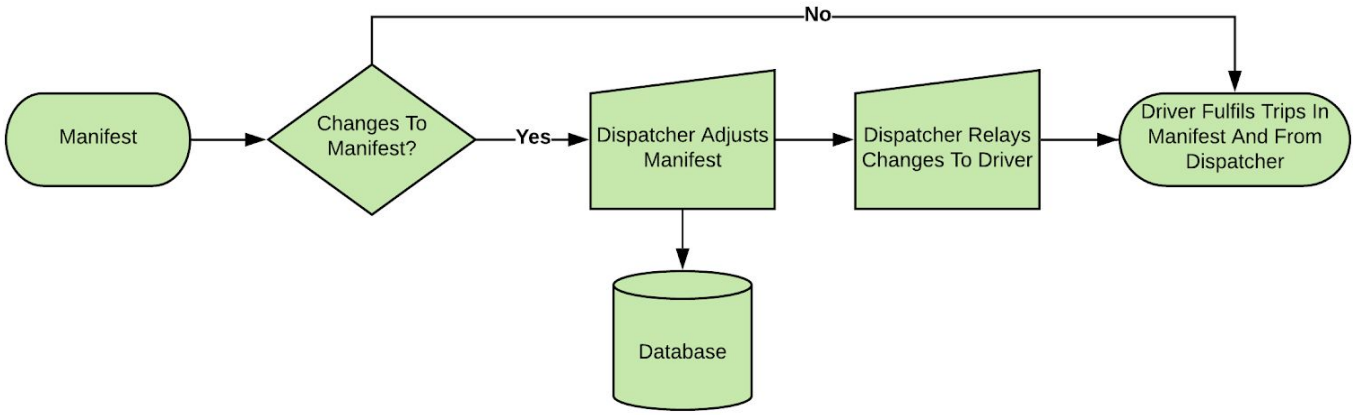

Figure B. Via's Processes To Fulfil Paratransit Trips (The Day Of Service).

Appendix D

Flow Chart of Via's Pilot Processes

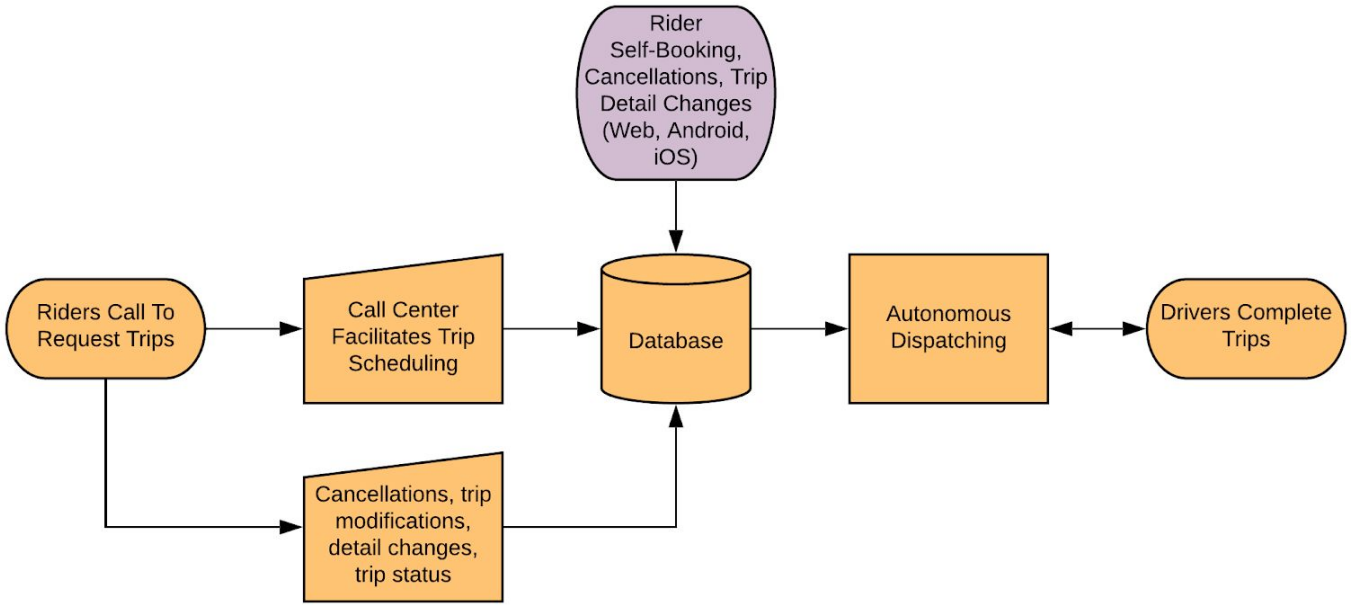

Figure A. Pilot Trip Management Processes (Continuous).