



**MONTANA**

Department of Transportation

**DRB**  
CONSULTING

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# Final Report

Prepared for the Montana Rural Transit Assistance  
Program (RTAP) Planning Study

December 2024

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# MONTANA RTAP ANNUAL TRAINING PLAN

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## Approach

FTA allocates resources to RTAP programs to support nonurbanized transit activities in four categories: training, technical assistance, research, and related support services. FTA defines technical assistance as “programs, processes, and resources that provide targeted support to a community, region, organization, or other beneficiary to help them access and deploy federal funding and build local capacity to develop, design, and deliver transportation plans and projects.”

This work plan outlines a plan for both training and technical assistance/related support services. It’s our understanding that to effectively engage transit agencies in training, there will also need to be a 1:1 support component with each agency to understand their training needs, and that work would fall more under technical assistance/related support services.

## Current Training

- Manager Refresher Training (MDT)
- Fall Conference (MDT)
- PASS Train the Trainer (MTA), Spring Conference
- Wheelchair Securement (MTA), Spring Conference
- Spring Conference (MTA)
- DRIVE Training (OPI)
- Drug & Alcohol Training, every few years
- MPOs host training occasionally
- PASS Training at individual agencies, open to other providers
- Scholarships to CTAA conference and National Bus Rodeo

## Roles & Responsibilities of MDT and Consultant

**MDT:** Direct strategy for RTAP program and administer FTA program funding and any administrative issues related to public transit.

**Consultant:** Implement strategy for RTAP program, report on outcomes, coordinate with MDT to understand transit agency needs and develop resources related to MDT’s work with transit systems.

Consultant and MDT would participate in National RTAP bi-annual peer RTAP manager meetings to learn from other programs and identify new resources to share.

# MONTANA DOT ANNUAL TRAINING PLAN CONT.

## Goals

- All agencies aware of training resources
- More agencies participating in training, especially those who were less engaged previously.

## Communications Plan

We recommend that MDT develop an RTAP website that shows upcoming training events and information and distribute the information on the website regularly through email communications using an email management system, such as MailChimp. Email communication would coordinate with the existing communication channels, including the Quarterly MDT newsletter and others to ensure that communications are consistent and not duplicated.

The **website** would include:

- A calendar showing all upcoming training, including training from MTA and MDT, such as the Rodeo and conferences, and training from transit operators that is open to other operators (resource sharing).
- Registration pages for each training event
- Linking to MTA and FTA and other resources
- Resource guides for common transit and training challenges
- Links to on-demand and online training from National RTAP, CTAA, and others
- Scholarship application and reimbursement
- Reporting tools for MDT and transit operators
- Training checklists and guides to understand the expectations for participation in training
- Form to share training topic requests and training needs

Resources from the website could be shared to the resources part of BlackCat, but BlackCat wouldn't be set up to display all the above information in the same way that a website would.

**Email communications** would include:

- Regular reminders of upcoming training (weekly, monthly, or other rhythm)
- Announcements when new training is added
- Bite-sized training resources and toolkits for transit managers
- Reminders for training (1 week before, 1 day before)
- Post-Training Survey

**Training Recipients:** Training would focus on providers of Tribal Transit and rural transit including operators funded through FTA Section 5311 and 5310. Other agencies can participate as allowed by MDT.

# MONTANA DOT ANNUAL TRAINING PLAN CONT.

**Balance of Training Plan:** Driver training is most time intensive and frequent, manager training includes the most variety and in-person time and maintenance and dispatch are tailored to their unique needs and capacity.

## Training Plan by Role

### All

**De-escalation Training/Managing Challenges on Your Bus:** This training would be developed as a custom training with qualified training provider(s) and would cover the following topics/scenarios:

- Human Trafficking
- Difficult/unruly passengers
- Bus fires and emergency procedures
- Emergency procedures for drug-related incidents
- Emergency procedures for medical emergencies
- Active shooter training
- Incident/Accident procedures and reporting

It could be offered as a 1 or 2-day training regionally, with bite-sized training components that attendees can bring back to their transit systems, such as short PowerPoints to train drivers or recommended videos, checklists, or worksheets.

### Managers/Trainers

*Recommended Timing from the Survey: 8am-noon Tuesday-Thursday*

### **Technical Assistance**

To meet the goal of engaging all transit systems, not just those already actively involved, the consultant would meet with each system individually at least once annually to understand their unique situation and work with them to recommend a training strategy.

### **Peer Roundtables**

Peer groups could be an opportunity to get transit managers together to share resources and ideas, such as around pros and cons of different dispatch software. We recommend quarterly virtual meetings. The consultant would facilitate and share learnings from the roundtables out on the website or other resources.

### **Regional Workshops**

Once a year in 3? regions (summer or winter?). Hosted at MDT facilities or at 5307 systems. Topics to include de-escalation topics (included above) and/or transit manager topics:

# MONTANA DOT ANNUAL TRAINING PLAN CONT.

## Mentorship Program

Consultant would draft a description of the program (yearlong?) that can be shared with transit operators.

**Option 1:** Create two short applications: mentor and mentee and match people based on location and application information (similarities, etc.).

**Option 2:** Market program at statewide and peer roundtables. Individuals can come to MDT as a pair to be added to the mentor-mentee program.

**Option 3:** Combination of options 1 and 2.

Create a loose curriculum/structure for meetings and quarterly online meeting check ins for all mentors/mentees to review status, ask questions, and get support.

## Webinars

Every other month webinars could be a good vehicle to share resources and training on a variety of requested topics with transit managers. Training needing more time could be introduced through webinars and expanded on at conferences or regional workshops.

## Bite-Sized Staff Training Resources (PowerPoints, Videos, etc.)

This could include updating existing resources, when possible, to include more relevant videos and up-to-date information and training.

## Training at Fall Conference

If there is space on the agenda, RTAP funds could be allocated to bring in a trainer for short training sessions as part of the MDT fall conference.

## Training at Spring Conference (MTA)

If there is space in the agenda and it's appropriate, RTAP funds could be allocated to support training at the spring conference, such as past topics:

- PASS Train the Trainer CTAA?
- Wheelchair Securement (Train the Trainer?) Q'Strait

Or other topics to be coordinated with the consultant, MDT, and MTA.

**PASS Train-the-Trainer** could also be offered via CTAA's virtual courses via a scholarship or coordinated as an in-person workshop, regionally if there is enough interest.

# MONTANA DOT ANNUAL TRAINING PLAN CONT.

## Bus Operators

*Recommended Timing from the Survey: 8am-2pm Tuesday and Wednesday*

### Passenger Assistance Safety & Sensitivity (PASS)

**Online:** Establish a relationship with a provider of PASS training online (CTAA or other) that can register bus operators through the consultant. Consultant would assist operators in getting set up for training and tracking progress and certification.

**In-Person:** Regional quarterly 1-day new driver training classes, likely offered back-to-back in different regions depending on trainer availability.

### Entry-Level Driver Training (ELDT)

Coordinate with MDT to understand transit systems needs and capabilities. Solutions could include train-the-trainer support, resource sharing strategies (exploring if small urban systems are willing to bring rural system drivers into their training), and scholarships to CDL courses at universities or other ELDT providers.

### Defensive Driving

Offered online through the Risk Management and Tort Division (RMTD) (scheduled webinars) or Coaching Systems (on-demand) or in-person through a qualified trainer (if desired).

### Winter Driving

Offered online through RMTD (scheduled webinars) or Coaching Systems (on-demand).

### Driver Skills

Short driver training skills courses could be offered through providers like the National Safety Council, with topics like:

- Speed management
- Weather and road conditions
- Avoiding fatigued driving
- Backing and parking lot strategies
- Etc.

If needed, the consultant could also create short training PowerPoints for managers to use with their drivers on key topics.

# MONTANA DOT ANNUAL TRAINING PLAN CONT.

## Maintenance

### Wheelchair Lift Repair and Maintenance

The consultant would work with MDT to identify lift maintenance trainers that could work with the types of vehicles and lifts used in Montana. BraunAbility could provide some/all of this training. The trainer would travel to each agency or through a corridor to provide training to each transit system.

### Vehicle Maintenance Management and Compliance (VMMC)

This is a comprehensive vehicle maintenance course from CTAA that covers preventive maintenance, fleet management, and technology. The intended audience would also include transit managers. It could be offered online through scholarships to attend CTAA's virtual courses or coordinated as an in-person training if there is enough interest.

## Dispatchers

Customer service training was a lower priority in the focus groups and dispatch training didn't come up as a direct need, so for this, we recommend working with the transit agencies to connect them to the online Dispatching & Scheduling training through National RTAP and listening for further requests for more in-depth or in-person training as requested.

## Scholarship Plan

Scholarships are a key part of the training plan as they would provide a way for transit systems to attend training — online and in-person, both out of state and in-state. The advantage of using a scholarship for some training is that because the recipient pays for the training up front there are fewer no-shows for training.

The consultant would work with MDT to understand the current scholarship policy and budget, including limits on funds, how reimbursement form questions are used, and ways to streamline the application process through the website, if interested. These tools can reduce the time spent entering data for both the agency and MDT and enhance reporting. For example, when the application and reimbursement are part of the same website form, the recipient only needs to update their expenses for reimbursement, instead of entering all the data twice and some parts of the application can be pre-populated from their user account, such as their name, address, etc.

With MDT approval, scholarships could also fund technology purchases for transit agencies, including dispatch software training or computers for online training.

# MONTANA DOT ANNUAL TRAINING PLAN CONT.

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## **Advisory Committee Plan**

An advisory committee would engage transit system representatives in the work of overseeing the RTAP program. It provides helpful insight into training needs and creates a highly engaged group of transit agencies that can help to amplify RTAP programs to their peers. Having representatives from partners like MTA can also help coordinate training with partners and improve communication.

The consultant would help coordinate the committee and lead meetings, which could include 12-15 participants and meet monthly, every two months, or quarterly virtually.

## **Partnerships Plan**

Consultant and MDT would identify key partners in the state who know of training needs. If appropriate, there could be a representative from those groups on the advisory committee, and if not, meetings could be set once or twice a year with the consultant, partner, and MDT to review training needs and share the training plan for awareness and collaboration.

## **Metrics & Reporting**

Reporting would be updated quarterly and shared at Advisory Committee meetings to include:

- Training Participation by Agency
- Training Participation and Registration by Event
- Survey Result Summary
- Training Feedback
- Scholarship Use and Participation

## **Annual Training Budget**

The 2024–2028 statewide management plan lists state RTAP funds as of FFY 2024 as \$321,156 in carryover funds and \$154,417 in annual apportionment. We recommend that an annual budget is set using the annual apportionment and the carry-over funds divided evenly among the years that the funds are available before they expire.



= Month Training Will Occur  
= Continuous

# MONTANA DOT ANNUAL TRAINING PLAN CONT.

	Calendar Year 2025												Calendar Year 2026											
Training	Jan-25	Feb-25	Mar-25	Apr-25	May-25	Jun-25	Jul-25	Aug-25	Sep-25	Oct-25	Nov-25	Dec-25	Jan-26	Feb-26	Mar-26	Apr-26	May-26	Jun-26	Jul-26	Aug-26	Sep-26	Oct-26	Nov-26	Dec-26
<b>Bus Operators</b>																								
Passenger Assistance Safety & Sensitivity (Online)																								
Passenger Assistance Safety & Sensitivity (In-Person)																								
Defensive Driving (Online)																								
Winter Driving (Online)																								
ELDT Coordination																								
Driving Skills (Online)																								
Montana DRIVE Adult Driver One-Day Workshops (OPI)																								
<b>Managers/Trainers</b>																								
Technical Assistance																								
Fall Transit Workshop (MDT)																								
Spring Conference (MTA)																								
State Bus Roadeo																								
Manager Refresher Training																								
Tribal Transit Workshop																								
Regional Workshop																								
Peer Roundtables																								
Mentorship Program																								
Transit Management Topic Webinars																								
<b>Maintenance</b>																								
Wheelchair Lift Repair & Maintenance																								
VMMC (Virtual Sessions or In-Person) — Month TBD																								
<b>Dispatch</b>																								
Customer Service (Online)																								

# MONTANA DOT ANNUAL TRAINING PLAN CONT.

Role	Course Title	Duration	Location	How Often Offered	Mandatory/Recommended	Trainer	Delivery Method	Estimated Cost (approx.)
All	De-escalation Training/Managing Challenges on Your Bus	6-8 hours	3 Regions	Annually	Recommended	TBD	In-Person	~\$6,000-\$7500 per class
All (or Managers)	Peer Roundtables	1 hour	Online	Quarterly	Optional	Facilitated by Consultant	Online (Live)	Labor cost
Dispatcher	Dispatching and Scheduling Training for Rural Transit Systems	Self-Paced	Online	Continuous	Recommended	National RTAP	Online (Self-Paced)	Free
Driver	Passenger Assistance Safety & Sensitivity (PASS)	4-8 hours, self paced	Online	Continuous	Strongly Recommended	CTAA or Other Online Provider	Online (Self-Paced)	\$25-50 per student
Driver	Passenger Assistance Safety & Sensitivity (PASS)	8 hours	Regionally	Quarterly	Required?	TBD	In-Person	~\$800 per class
Driver	Defensive Driving	4 hours	Online	Continuous	Strongly Recommended	Coaching Systems/National Safety Council	Online (Self-Paced)	~\$32 per student
Driver	Defensive Driving	4 hours	Online	TBD	Strongly Recommended	RMTD	Online (Live)	Unknown
Driver	Winter Driving	4 hours	Online	Continuous	Recommended	Coaching Systems/National Safety Council	Online (Self-Paced)	~\$32 per student
Driver	Winter Driving	4 hours	Online	TBD	Recommended	RMTD	Online (Live)	Unknown
Driver	Montana DRIVE Adult Driver Summer Workshops	8 hours	Lewistown, MT	Weekdays June-August	Recommended	OPI	In-Person	\$375 per student
Driver	National Safety Council Driver Modules - Speed Management - Avoiding Aggressive Driving - Lane Management - Intersections - Avoiding Impaired Driving - Avoiding Fatigued Driving - Weather and Road Conditions - Backing and Parking Lot Strategies	1 hour or less	Online	Continuous	Recommended	Coaching Systems/National Safety Council	Online (Self-Paced)	\$10.75 per student
Maintenance	Wheelchair Lift Repair and Maintenance	4 hours	Along a travel corridor/each agency individually	Annually	Strongly Recommended	BraunAbility?	In-Person	TBD
Maintenance	Vehicle Maintenance Management and Compliance (VMMC)	8 hours	TBD	TBD	Optional	CTAA	In-Person	\$6,500 per class
Maintenance	Vehicle Maintenance Management and Compliance (VMMC)	7 hours	Online	TBD	Optional	CTAA	Online (Live)	\$600-750 per student
Managers	Regional Workshops	8 hours	Regionally	Annually	Strongly Recommended	TBD	In-Person	~\$6,000-\$7500 per class
Managers	Mentorship Check Ins	1 hour	Online	Quarterly	Optional	Consultant	Online (Live)	Labor cost
Managers	Technical Assistance Meetings	1 hour	Online	Annually	Strongly Recommended	Consultant	Online (Live)	Labor cost
Managers	PASS Train-the-Trainer	8 hours	Online	TBD	Recommended	CTAA	Online (Live)	\$600-750 per student
Managers	Topic Webinars	1.5 hours	Online	Every other month	Recommended	TBD	Online (Live)	Range, but outside trainers in the \$1,000-2,000 range

# MONTANA DOT ANNUAL TRAINING PLAN CONT.

<b>Transit Manager Training Topics</b>
RTAP 101: How to take advantage of training tools
Procurement
HR Basics
Public Engagement & Managing TACs
NTD Reporting & BlackCat
Policy Training and Checklists
Civil Rights: Title VI, Title II and ADA
Disability Etiquette
Coordinated Transportation Planning
Marketing
Fleet & Facility Asset Management
Incident/Accident Procedure & Reporting
Insurance for Small Transit Agencies
Drug & Alcohol Program Management (coordinate with existing training)
Program Updates (as/if needed?) <b>(Required)</b>
Project Administration
Building Websites for Transit
Planning

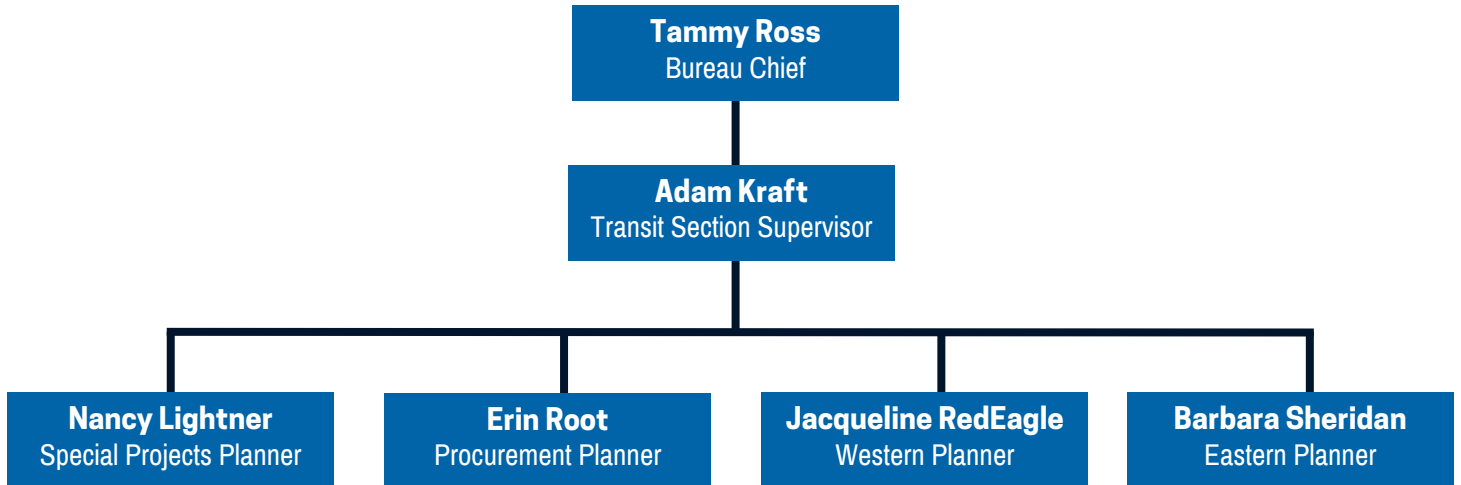
## MONTANA DOT ANNUAL TRAINING PLAN CONT.

STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
What is MDT RTAP currently doing well?	What are the areas for improvement?	What opportunities exist for MDT to improve training?	What factors could negatively impact MDT RTAP if not mitigated?
High levels of trust between transit providers and MDT.	Clear and consistent communication.	Communications strategy for a central location for training resources and opportunities (e.g. website) and how and how often to communicate training opportunities and reminders.	Future federal funding could be reduced if current funds are not used before they expire. In reality, the bigger threat is not having the resources to use the funds provided by FTA before they expire.
MDT staff is engaged with transit providers and responsive to requests for help.	The scholarship process can be complex and overwhelming, somewhat due to the complexity of federal requirements for funding.	Hosting in-person training at each transit provider whenever possible could reduce drive time/travel logistics and increase participation.	Global pandemics and other government shut downs can make training delivery challenging.
Funding is available to support training.	Transit provider awareness of available training resources within Montana and nationally, such as National RTAP resources and training.	Partnerships with transit stakeholders, like MTA, HHS, and others to collaborate on training and rider needs.	Driver shortage affects retention and hiring and may affect a transit provider's ability to participate in training.
Partners like MTA and HHS are invested in training and want to be included in training efforts.	Training isn't always easy to attend leading to low turnout or participation.	Transparency with transit providers and partners about how RTAP funding is budgeted and spent.	Challenges in hiring younger employees affects succession planning and workforce sustainability.
Driver training at OPI in the summer is well-liked and effective behind-the-wheel training.	Unclear expectations from MDT could be contributing to inconsistent training between transit providers.	Fentanyl, Narcan, and de-escalation training to assist with unique challenges of transporting passengers over long distances. There is a need to clarify the difference between recognizing drug use in passengers and responding to a medical challenge, as well as distinguishing between drug and alcohol regulations for staff vs. drug and alcohol policies and procedures for riders.	Lack of policies and procedures can be a liability for transit providers.
The small size of the MDT RTAP team means that the team is nimble and adaptable to changing needs and priorities.	Deeper understanding of the unique challenges of running a transit agency. It's in good shape, but can always be better.	Including rural and small urban context in training to make training more relevant and engaging.	Accidents and litigation from inconsistent driver training.
MDT is researching ways to expand RTAP, including the rural needs study and RTAP coordinator.	Offering training at the right time with the right format so people can attend.	5307 transit providers are willing to host training for 5311 providers and open their training to others. A transit facility in Billings and Mountain Line have offered their training facilities.	Insufficient frontline staff conflict de-escalation training could lead to injuries and retention issues.
Long term relationships with many of the transit providers, many decades of relationship-building.	Lack of coordination between MTA and MDT doesn't result in a unified program and can be redundant. Coordination between MTA and MTA members isn't always consistent around training priorities and resources.	Connecting compliance reviews and accident/incident with training.	Turnover in the MDT program. It is a very small team and any turnover can negatively affect being able to manage the RTAP program.
	Transit providers may not have the technology (hardware, software) they need to effectively do their work and participate in training and reporting (NTD and BlackCat).	Collaborating with National RTAP and other state RTAP programs and training programs to understand best practices and share resources.	Changing of funding authority and state and local match: Without the spending authority, the funds can't be used. Spending authority is approved for several years and without it, the work can't be performed.
	Site visits and 1-on-1 training can be expensive from both a staff time and funding perspective.		Changes in administration (state, federal, local) can change transit allocations and operations.

# MONTANA RTAP RECOMMENDATIONS & REPORT

## Current MDT Processes and Services Organizational Structure

Montana DOT’s transit office administers Montana’s RTAP program. The transit section’s organizational structure includes:



The transit team has many responsibilities, but for RTAP the Transit Section reviews and approves scholarship applications and reimbursement forms, plans and coordinates training events, funds training opportunities and the Montana Transit Association (MTA), and shares training resources and information through newsletters and other communications channels.

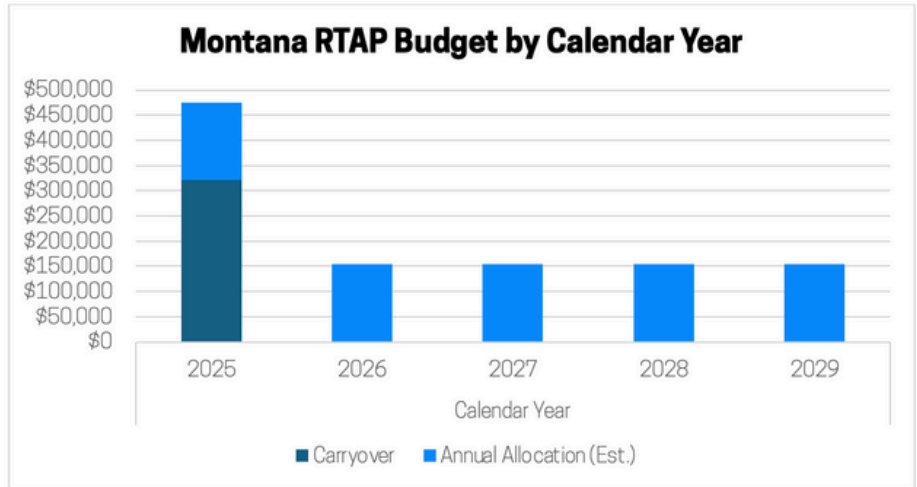
## Financial Charts Showing MDT RTAP Dollars Available and Annual Allocation

	Calendar Year				
	2025	2026	2027	2028	2029
<b>Carryover</b>	\$321,156				
<b>Annual Allocation (Est.)</b>	\$154,417	\$154,417	\$154,417	\$154,417	\$154,417

This chart is based on data from the Montana 2024–2028 Statewide Transportation Improvement Plan (STIP) as of Federal Fiscal Year (FFY) 2024. Defined in the STIP, “carryover is the process by which unobligated funds remaining at the end of a 12-month budget period may be carried forward to the next budget period to cover allowable costs in that budget period.” The STIP reports \$321,156 in carryover funds for RTAP. Annual allocations from FTA expire three years after they are received.

# PROCESSES & SERVICES & STRUCTURE CONT.

We recommend that the carryover funds be added to the budget years below, divided equally among the years they can be used. For example, if \$90,000 was available through 2027, \$30,000 would be added to the budget years for 2025, 2026, and 2027. The chart below shows all carryover funds in 2025 because we do not know the exact amount of carryover funds as of this report or the amount of carryover funds by year of expiration.



## Peer RTAP Program Review

The DRB team analyzed RTAP program data from the National RTAP and the Federal Transit Administration (FTA) to identify six RTAP programs that are peers to Montana. Peer programs were selected based on similarity in RTAP apportionment, size of the state, population, and characteristics of their rural providers, such as the distance between rural transit agencies. Three states have participated in interviews so far and the information they provided is outlined below:

	North Dakota	South Dakota	Utah	Montana
<b>2024 Annual Allocation</b>	<b>\$117,334</b>	<b>\$142,844</b>	<b>\$149,069</b>	<b>\$154,417</b>
<b>Program Management Type</b>	<b>In-House</b>	<b>In-House</b>	<b>Third Party</b>	<b>Hybrid</b>
<b>Why did you decide to administer in that way?</b>	It's always been this way.	Administering their program in-house works for them. They don't see a need for a consultant to do what the DOT staff can do.	The DOT has a small staff and wouldn't have the capacity to administer it in-house. The state's transit association manages the program, and they were the only respondent to the RFP.	n/a

## PEER RTAP PROGRAM REVIEW CONT.

	North Dakota	South Dakota	Utah	Montana
<b>Program Management Type</b>	<b>In-House</b>	<b>In-House</b>	<b>Third Party</b>	<b>TBD</b>
<b>What are the goals for your RTAP?</b>	No identified goals	No specific goals, but funds go primarily to scholarships, with some amount budgeted for annual transit association conference training (in the ballpark of \$20k) and occasional in-person training from the DOT, such as drug & alcohol training.	No formal goals. The DOT's priority is making sure the funding is used for the benefit of the true rural transit agencies and not just for the urban agencies that provide service out to the rural areas.	In process of identifying goals. Some include: New managers feel more confident in their roles and experienced managers feel more engaged.
<b>What metrics are used to measure success?</b>	Informal survey of transit providers to make sure needs are being met and identify training needs.	<ul style="list-style-type: none"> <li>• Purpose of training requests</li> <li>• Scholarship denials</li> <li>• Scholarship approvals</li> <li>• How much each agency spends in RTAP funds</li> </ul>	<p>The association reports on:</p> <ul style="list-style-type: none"> <li>• Budget categories and expenditures</li> <li>• Type of training</li> <li>• Number of trainings</li> </ul> <p>Historically, there hasn't been a lot of oversight of the metrics.</p>	<p>In process of identifying metrics. Some include:</p> <ul style="list-style-type: none"> <li>• Number of people trained</li> <li>• Engagement in training by transit provider (measuring participation across all, not just heavy participation from one group) Job roles participating (driver, manager, etc.)</li> </ul>

## PEER RTAP PROGRAM REVIEW CONT.

	North Dakota	South Dakota	Utah	Montana
<b>Program Management Type</b>	<b>In-House</b>	<b>In-House</b>	<b>Third Party</b>	<b>TBD</b>
<b>How is the scholarship program managed?</b>	<p>They used to have a scholarship application and reimbursement form.</p> <p>This is the first year that transit providers are budgeting for training as part of their operating grant using RTAP funds. Transit providers still need to get approval to use those funds for out-of-state training. They complete reimbursement forms after the training and costs must fall within the appropriate/approved ranges as identified by the DOT.</p>	<p>There is a fillable request for funds (scholarships) form and a fillable reimbursement form that the DOT administers. Funds are first come, first served. Each applicant receives an RTAP number. The DOT reviews the application and information about the training to determine if it would be helpful. If it is nonstandard training, the applicant must provide a post-training report, which may include a presentation at the quarterly subrecipient meeting. There is a cap on the amount of scholarship funding a single agency may use in a year to attend out-of-state events. There is no cap on in-state events like the annual conference to encourage wide attendance. Reimbursement forms must be submitted within 90 days of the event.</p>	<p>The association awards scholarships. There is no criteria or monitoring. The DOT is not involved, but they would like to be more involved.</p>	<p>Scholarship application fillable form emailed to the DOT for review.</p> <p>Reimbursement fillable form emailed to DOT for review.</p>



## PEER RTAP PROGRAM REVIEW CONT.

	North Dakota	South Dakota	Utah	Montana
Program Management Type	In-House	In-House	Third Party	TBD
<b>Do you have an RTAP website?</b>	<p>No separate website. There is not a lot of information about their state RTAP program on their website. The transit providers are very familiar with the National RTAP website, and the DOT refers transit providers there for resources.</p>	<p>No separate website. Scholarship forms are available on the DOT webpage.</p>	<p>No separate website. Training is listed on the association's website (ursta.org). No mention of the state RTAP program or scholarships on the association's website.</p>	<p>No separate website. Scholarship forms, program information, and training resources are on the DOT website.</p>
<b>If you have contracts with training providers, with whom and what training do they provide?</b>	<p>Dakota Transit Association (DTA) (joint transit association of ND and SD) hosts an annual conference; both states provide RTAP funding for speakers. In the past, they used NDSU for training on creating 3-and 5-year plans. They use Easterseals for ADA and travel training. They use CTAA and in-state trainers to provide PASS training. RTAP also pays for the top two state Rodeo winners to go to CTAA. RLS has provided Procurement Training. The DOT provides training in-house for BlackCat (new modules) and webinars on the grants process.</p>	<p>Most training is provided by DOT staff. Larger transit providers have staff who are PASS-certified trainers. Those agencies provide training to smaller agencies and the smaller agencies request RTAP scholarships to pay the larger agency for the training. Drug &amp; Alcohol training provided by NTI.</p>	<p>The association has an annual contract with a travel trainer who provides wheelchair securement and safety training, otherwise they procure training with providers as needed.</p>	<ul style="list-style-type: none"> <li>• Manager Refresher Training — MDT</li> <li>• Fall Conference — MDT</li> <li>• PASS Train the Trainer — MTA, Spring Conference</li> <li>• Wheelchair Securement — MTA, Spring Conference</li> <li>• Spring Conference — MTA</li> <li>• DRIVE Training — Office of Public Instruction</li> <li>• Drug &amp; Alcohol Training, every few years — National Transit Institute</li> <li>• MPOs host training occasionally</li> <li>• PASS Training at individual agencies, open to other providers</li> </ul>

# PEER RTAP PROGRAM REVIEW CONT.

	North Dakota	South Dakota	Utah	Montana
Program Management Type	In-House	In-House	Third Party	TBD
<p><b>How are training opportunities communicated to transit providers?</b></p>	<p>They use email and email lists by segment. For example, they have a list for rural, small urban, etc. They do not have newsletters.</p>	<p>Information about upcoming training is sent out in a biweekly DOT email. This includes in-state and out-of-state trainings, drug and alcohol program updates and relevant trainings from National RTAP's email of training opportunities. Announcements are sent out for any training that occurs between regular emails. The DOT is in constant communication with transit providers.</p>	<p>The association sends emails. The DOT is on their email list but does not have visibility to the transit contact list. The DOT follows up by sending an email via their .gov list. The DOT is not confident that the association's communications are getting to the right people, i.e., rural transit. Training is not provided frequently so communication is infrequent. Training seems to center on annual conference and sporadic training.</p>	<p>Moving Montana Transit quarterly newsletter for training resources and upcoming events.</p> <p>Email announcements and constant communication with transit providers.</p>
<p><b>Any additional information you'd like us to know?</b></p>	<p>Their DOT has 4 total employees in the transit section — 3 employees and a supervisor. They each manage 1/3 of the agencies and they each have programs they oversee such as Drug and Alcohol. One person manages RTAP.</p>	<p>They may switch to ND's model of a contract for each transit system with a budget for training expenses that can be utilized.</p> <p>ARPA funds caused some carryover funding, but they are mostly back to spending all of the allocated funds.</p> <p>Dispatch training hosted by a transit provider had 7 of the 13 or 14 agencies in attendance.</p>	<p>The DOT did not previously have the capacity to direct the strategy for the RTAP program before but now do.</p> <p>They are a small department; there are 5 staff members and a couple of part-time consultants they use as needed to augment their team. With the exception of one person, everyone has 3 people or less in their department.</p>	<p>5 staff members in the transit section for comparison to the other agencies.</p>

## PEER RTAP PROGRAM REVIEW CONT.

	North Dakota	South Dakota	Utah	Montana
Program Management Type	In-House	In-House	Third Party	TBD
<p><b>Any additional information you'd like us to know?</b> <b>CONTINUED</b></p>		<p>The DOT does trainings on transit topics after their staff attend national trainings, such as procurement training.</p> <p>They requested the results of this peer survey, if available.</p>	<p>They are interested in other ways to administer their RTAP program, such as partnering with their state LTAP (Local Technical Assistance Program) center. They see that some other state agencies do this, and that LTAPs are sometimes operated out of universities. Their state association is operated by volunteers and has trouble with follow-through. They are looking for more accountability. They are considering doing a similar needs study to MT in a year. The state association is on year 3 of a 5-year contract. Next year, year 4, the DOT plans to evaluate their options and</p>	

# RTAP PROGRAM ADMINISTRATION OPTIONS & PROS AND CONS

## Options: In-House, Hybrid, or Third Party

The data below was gathered from the peer survey (above), National RTAP’s [State RTAP Manager’s Toolkit](#), and discovery for this project.

### In-House

Pros	Cons
<ul style="list-style-type: none"> <li>• More funding can be allocated to scholarships vs. training coordination.</li> <li>• The DOT has direct influence over how the program is administered.</li> <li>• More regular contact with the transit providers to understand their needs.</li> </ul>	<ul style="list-style-type: none"> <li>• Managing RTAP can be time consuming for the DOT, leaving less time for the DOT to focus on other priorities.</li> <li>• There is a cost to the state to hire staff to manage RTAP programs because RTAP funds cannot be used to fund the salaries or benefits of state DOT employees.</li> <li>• When RTAPs are managed in-house it’s usually just one aspect of the staff’s responsibilities, and ease of administration can take priority over training that is more complex.</li> </ul>

### Hybrid

Pros	Cons
<ul style="list-style-type: none"> <li>• Collaboration between the consultant and the DOT can improve training outcomes.</li> <li>• All the benefits of an in-house program and a third-party program combined.</li> </ul>	<ul style="list-style-type: none"> <li>• Coordinating division of responsibility can be challenging and time consuming.</li> <li>• Transit providers may be confused about who to reach out to for RTAP assistance without a clear communication framework.</li> <li>• Some of the cons of both in-house and third-party methods apply.</li> </ul>

# RTAP PROGRAM ADMIN & PROS AND CONS CONT.

## Third Party

Pros	Cons
<ul style="list-style-type: none"><li>• DOT staff has more time to dedicate to other projects and priorities.</li><li>• Consultants can often respond to needs more quickly.</li><li>• Consultants have more time and resources to develop thorough training and communications strategies.</li><li>• Consultants sometimes have more flexibility and capacity to travel to training sites.</li><li>• Having a consultant team provides another resource for transit providers to reach out to for help in addition to the DOT.</li><li>• The DOT does not need to hire additional employees to manage their workload (coming out of state funds) and they do not add to the increasingly large workload of DOT staff.</li><li>• Consultants can manage an external website for the program that connects to the DOT, with more flexibility in website format and functions.</li></ul>	<ul style="list-style-type: none"><li>• The costs and time associated with the RFP solicitation, review and selection process.</li><li>• Potential for less direct contact with transit providers.</li><li>• Potential for less oversight of the program strategy and implementation.</li></ul>

## FINAL RECOMMENDATIONS

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National RTAP hosted a peer RTAP forum in 2012 where state RTAP managers shared key questions for state RTAP managers to consider when determining how to administer their program:

- How involved does the manager want to be in the daily activities associated with program delivery?
- How much time does the State DOT staff have to spend on the RTAP program?
- What kind of staff resources does the program have?
- What are the state subrecipients' needs?
- What is the budget for the program?
- Is there another entity in the state that would be a natural fit to deliver the State RTAP program?
- Does the state have travel restrictions that would prevent State DOT staff from visiting training sites?

The DRB team understands that the MDT staff wants to be involved in the RTAP strategy but has limited time and resources for the coordination and implementation of the program. There is a high statewide demand for training from transit providers and a budget surplus/carryover funding from past years' RTAP allocations. The state does not have restrictions that would prevent MDT staff from visiting training sites, but site visits are time consuming due to the distances between transit providers in the state. Sharing the roles, responsibilities, and workload with a consultant would be beneficial.

Through data gathered in the survey, focus groups, the Strengths, Weaknesses, Opportunities & Threats (SWOT) analysis, and discussions with MDT, **we recommend that MDT work with a third-party consultant to administer their RTAP program.**

This recommendation is based on the following factors:

1. The MDT transit section is a small team with many responsibilities and a high workload.
2. Transit providers are short staffed and have limited time to manage training programs.
3. There is a high demand for training and an identified need for additional communication and one-on-one support to understand RTAP and all the ways it can support Montana transit providers.

National RTAP's biennial [state RTAP manager survey](#) shows a trend toward third-party and hybrid program management, from two-thirds of all programs administering their programs in-house in 2010 to half of all programs in 2022.

Transit providers have limited time to travel to training and maintain training records based on current demands on their time. Administering the RTAP program through a consultant can reduce workload for the transit systems by making training registration easier, training locations more accessible, and training documentation provided automatically.

## FINAL RECOMMENDATIONS CONT.

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Working with a third-party consultant also provides the DOT with a partner to help facilitate MDT's relationships with MTA, MPOs, and other transit stakeholders in Montana. Facilitation of an advisory committee and other planning meetings can help improve relationships and provide a common space to work on shared goals for knowledge transfer related to public transit.

Consultants have more time and capacity to track metrics and goals and ensure engagement across all transit providers eligible for training, including Tribal Transit. They can work with training partners to customize training for Montana audiences and fill training gaps identified in annual needs surveys.

FTA Section 5311(b) funding for state RTAP programs is authorized to be used in-house, through a third-party consultant, or a hybrid of both options. When using a consultant, the consultant services can be for a period of 3–5 years. National RTAP has guidance for states looking to outsource their programs, including [sample RFPs](#) and other tools on their website.

The FTA funding for RTAP authorizes a state's RTAP to be managed with contracted services. As noted, this can be for an interim time period (3 to 5 years) allowing the MDT team and partners such as MTA to work with a consultant to implement a training program for the state's transit systems.

The data gathered as part of this study shows that administering the program through a third-party consultant would combine the transit knowledge and strategic direction of the MDT staff with the resources and expertise of a consultant team — ultimately leading to improved training outcomes across the state.

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*MDT Survey*

*Overview*

*August 20, 2024*

*Prepared by:*

*DRB Consulting + Big Sky Public Relations*

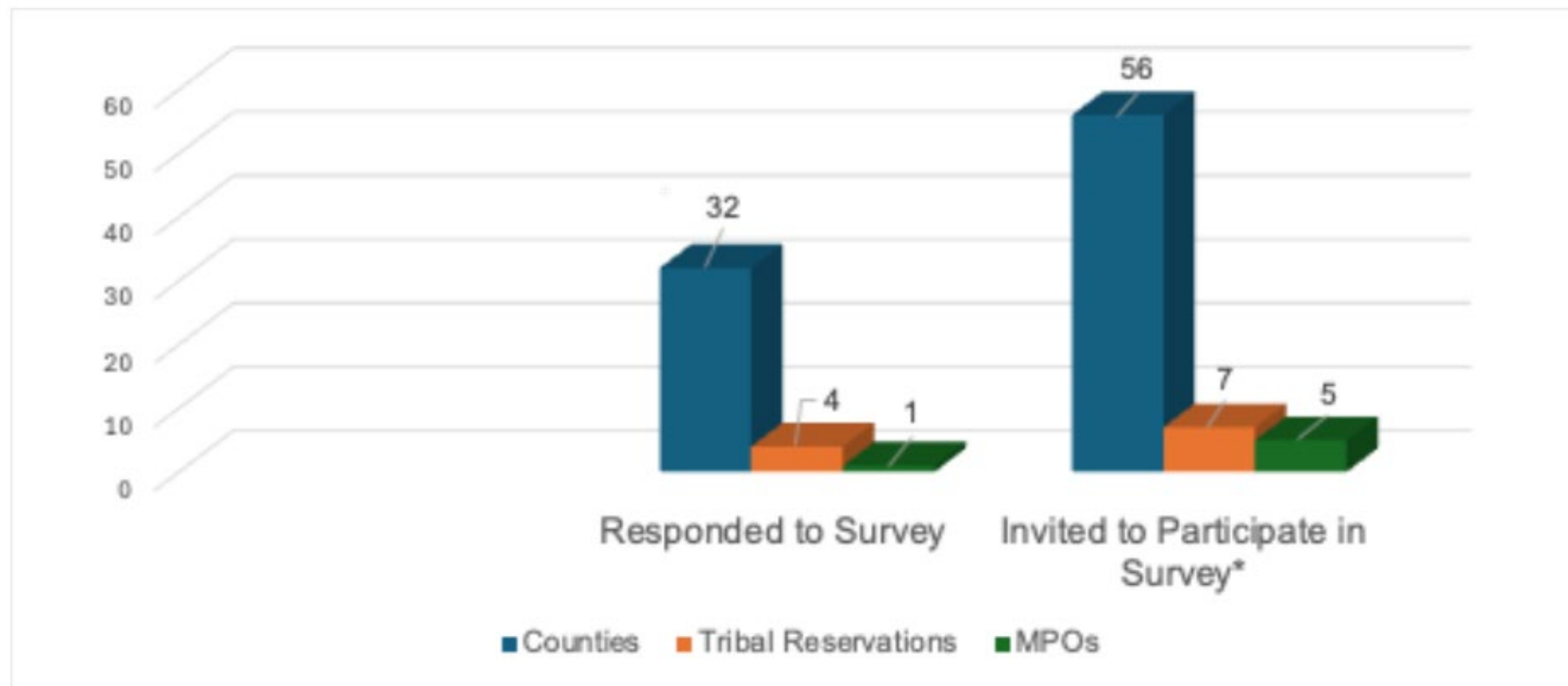


## SURVEY – PARTICIPATION

We heard from 54 participants across:

- 4 Tribal Nations
- 32 Counties
- 1 MPO

Invited vs . Res ponded Breakdown by County, Tribal Res ervation and MPO



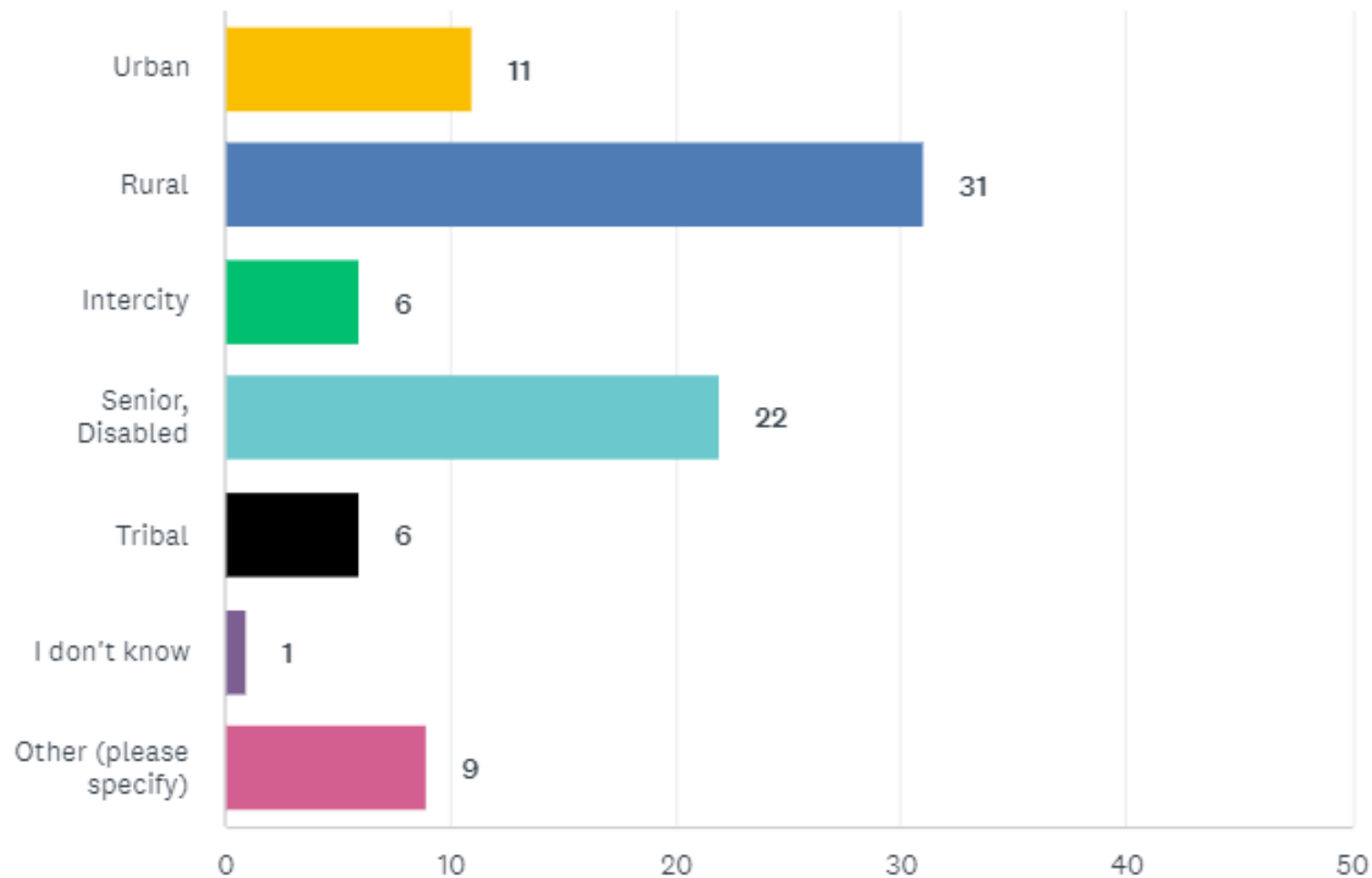
*\*Represents the emails provided by MDT. This number does not account for the survey being shared beyond that list.*

# SURVEY – AGENCY PRIMARY AREA OF SERVICE

## Question 2

What type of transit agency/organization(s) do you represent? Select all that apply.

Answered: 54 Skipped: 0



Of the other responses:

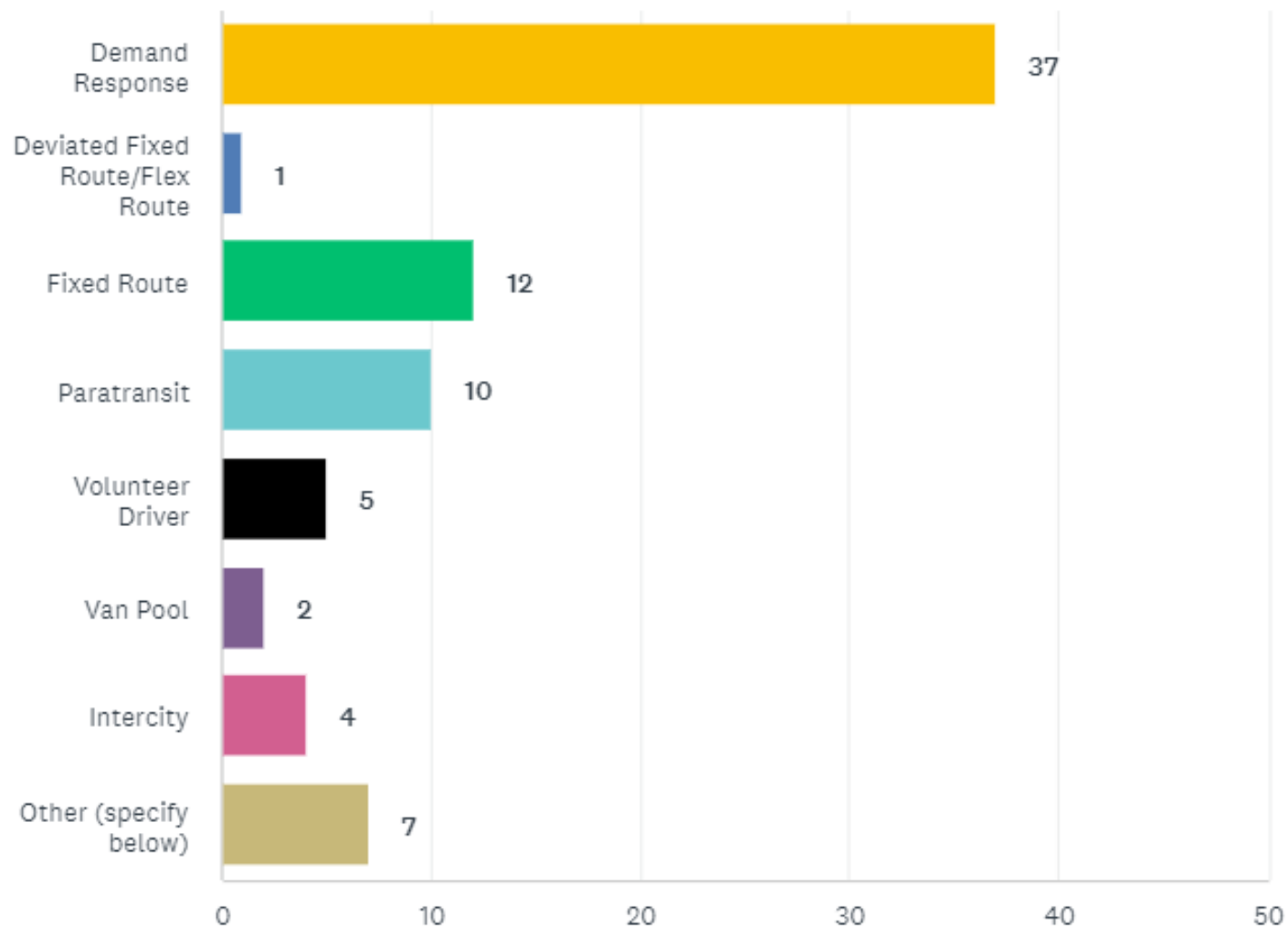
- 4 could be grouped with senior, disabled
- 3 from MDT
- 1 University
- 1 vanpool

# SURVEY – TYPE OF SERVICES

## Question 3

Select the type of transit service(s) your agency/organization provides. Select all that apply.

Answered: 53 Skipped: 1



Of the other responses:

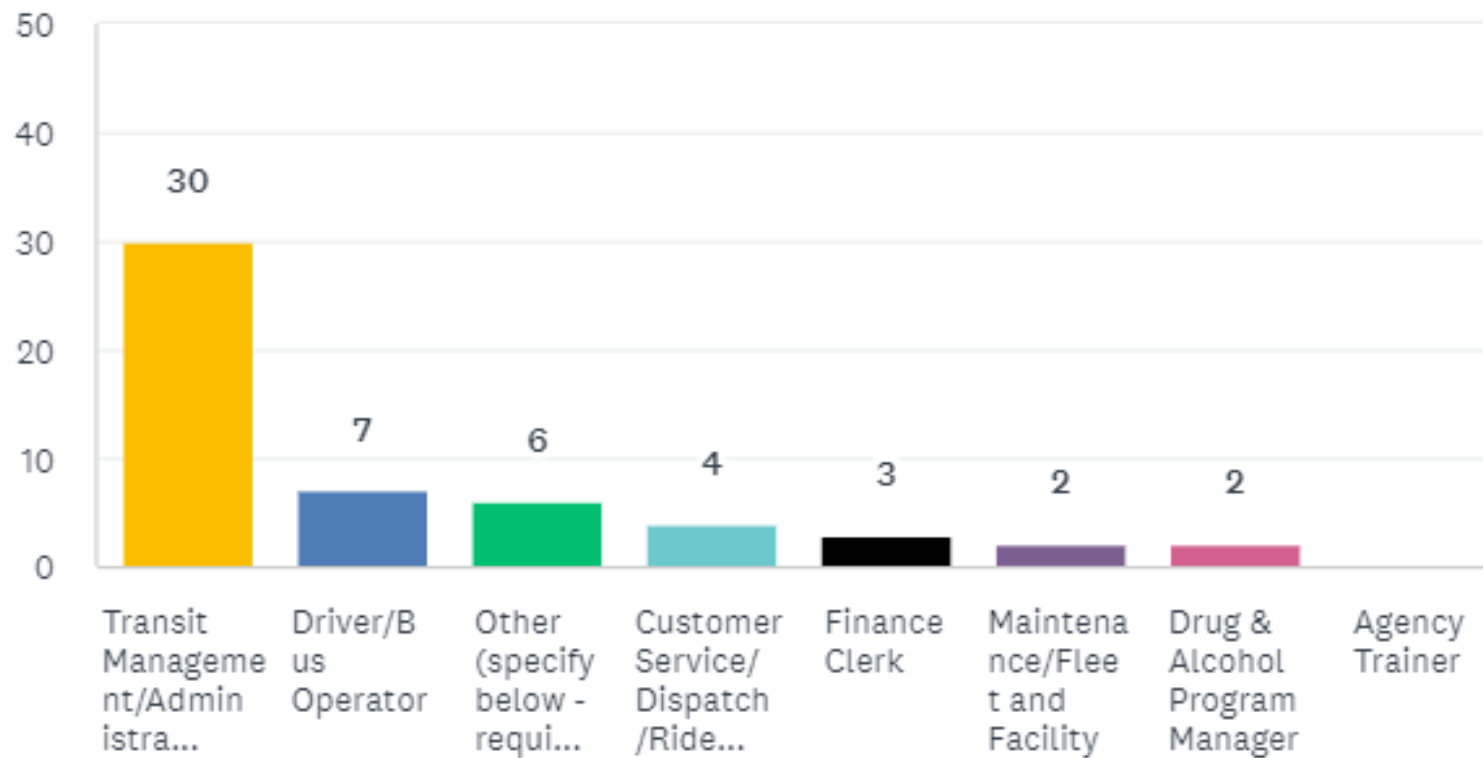
- 1 could be grouped with demand response
- 4 were MDT staff or someone with oversight of all types
- 2 didn't provide enough detail to be classified

# SURVEY – PRIMARY ROLE

## Question 4

What is your PRIMARY role at your agency? This will determine the questions you are asked for this survey. You will have the option to answer questions for additional roles you work/supervise later in the survey. (SELECT ONE)

Answered: 54 Skipped: 0



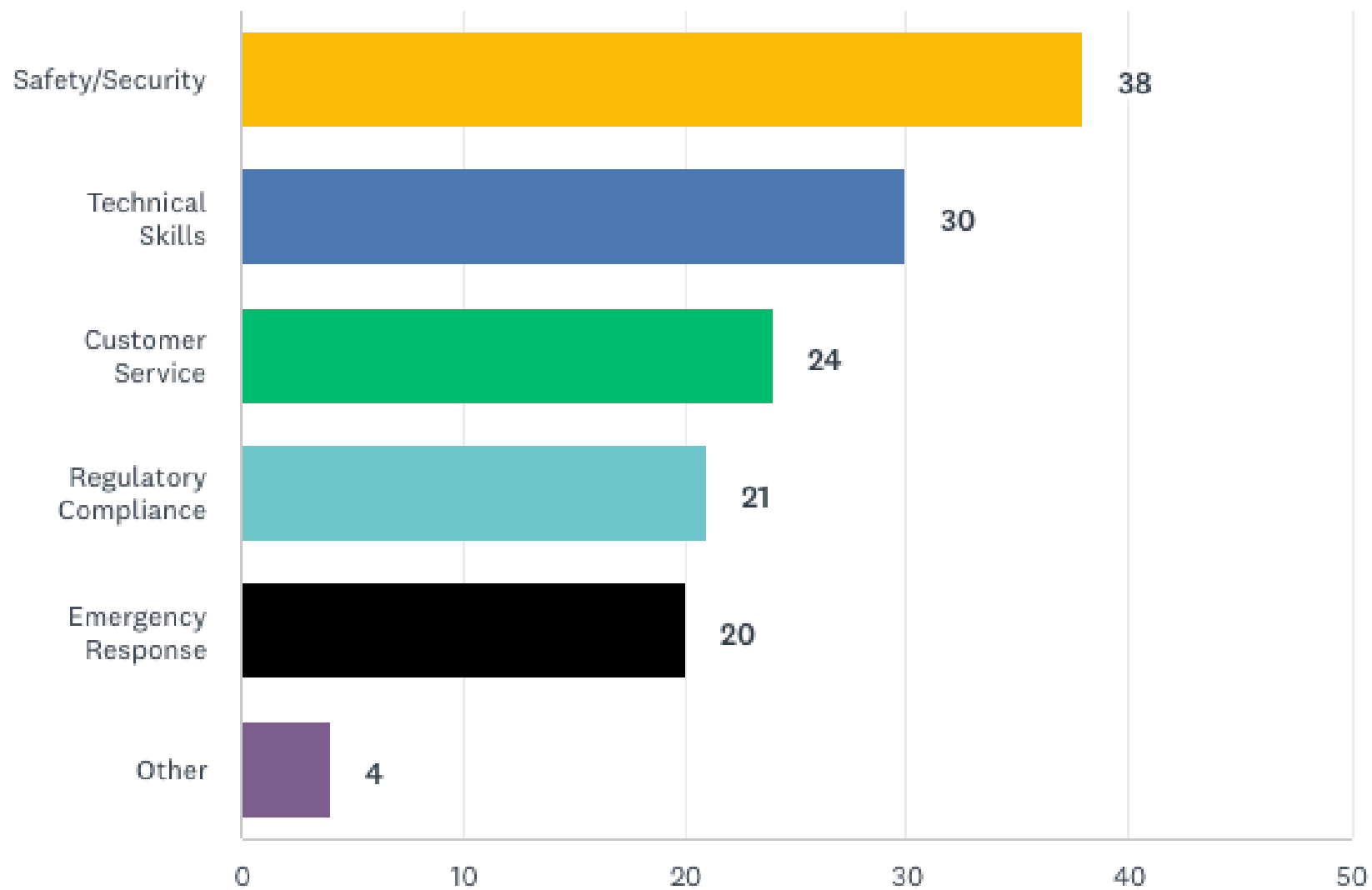
Of the other responses:

- 1 is both a dispatcher and driver
- 1 is a dispatcher
- 2 are MDT staff
- 1 could be grouped with Finance Clerk
- 1 is a volunteer driver

## SURVEY – TRAINING CATEGORIES (ALL)

What areas of training do you believe is needed in your agency? Select all that apply.

Answered: 51 Skipped: 3



**Top 3 Training Needs:**

1. Safety Training
2. Technical Skills
3. Customer Service

## SURVEY – ICON KEY



### Managers

Includes transit managers/administrators, finance clerks/managers, drug and alcohol program managers, and people who selected “other”



### Drivers



### Dispatchers

## SURVEY – TRAINING TOPICS (MANAGERS/ADMINISTRATORS) – TOP 6

### Question 1 1



Please indicate your interest in the following:

Answered: 40   Skipped: 14

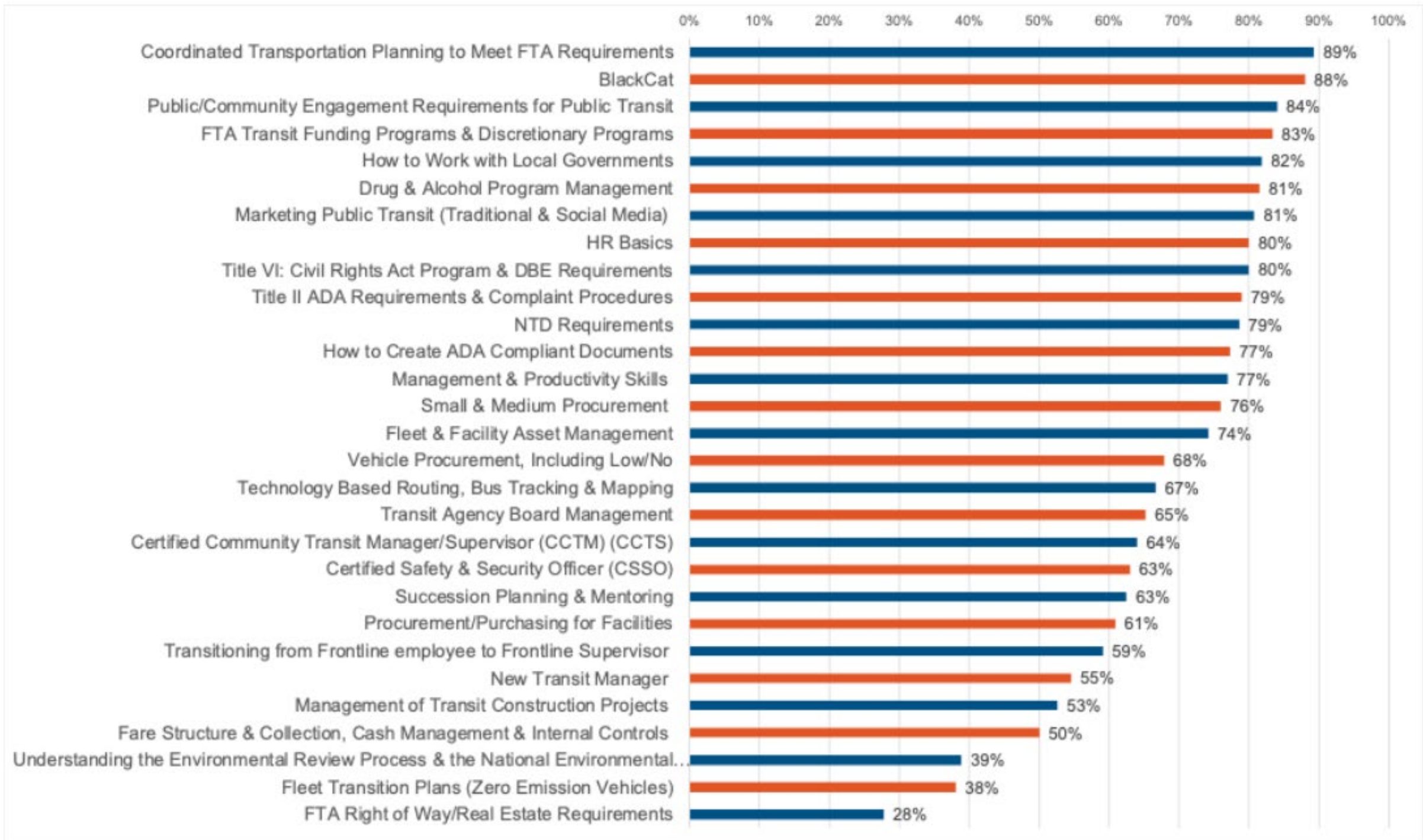
Top 6 training topics for managers:

1. Coordinated Transportation Planning to Meet FTA Requirements
2. HR Basics: Managing Recruitment & Retention; Employee Performance; Policies & Handbooks
3. Fleet & Facility Asset Management
4. NTD Requirements
- tied* 5. Drug & Alcohol Program Management
6. BlackCat

# SURVEY – TRAINING TOPICS (MANAGERS/ADMINISTRATORS)

## Question 11

Of the *people who responded to each topic*, what percent was interested?





## SURVEY — LOWEST RATED TRAINING TOPICS (MANAGERS/ADMINISTRATORS)

### Question 11



Please indicate your interest in the following:

Answered: 40   Skipped: 14

#### Bottom 5 training topics for managers:

1. FTA Right of Way/Real Estate Requirements
2. Understanding the Environmental Review Process & the National Environmental Policy Act (NEPA)
3. Fleet Transition Plans (Zero Emission Vehicles)
4. Fare Structure & Collection, Cash Management & Internal Controls
5. Management of Transit Construction Projects

*Note: This list is based on the number of people who rated the topic as “interesting,” when you sort by the highest number who rate it as “not interesting,” the list is slightly different, because it may measure people who feel more strongly that a topic is not interesting.*

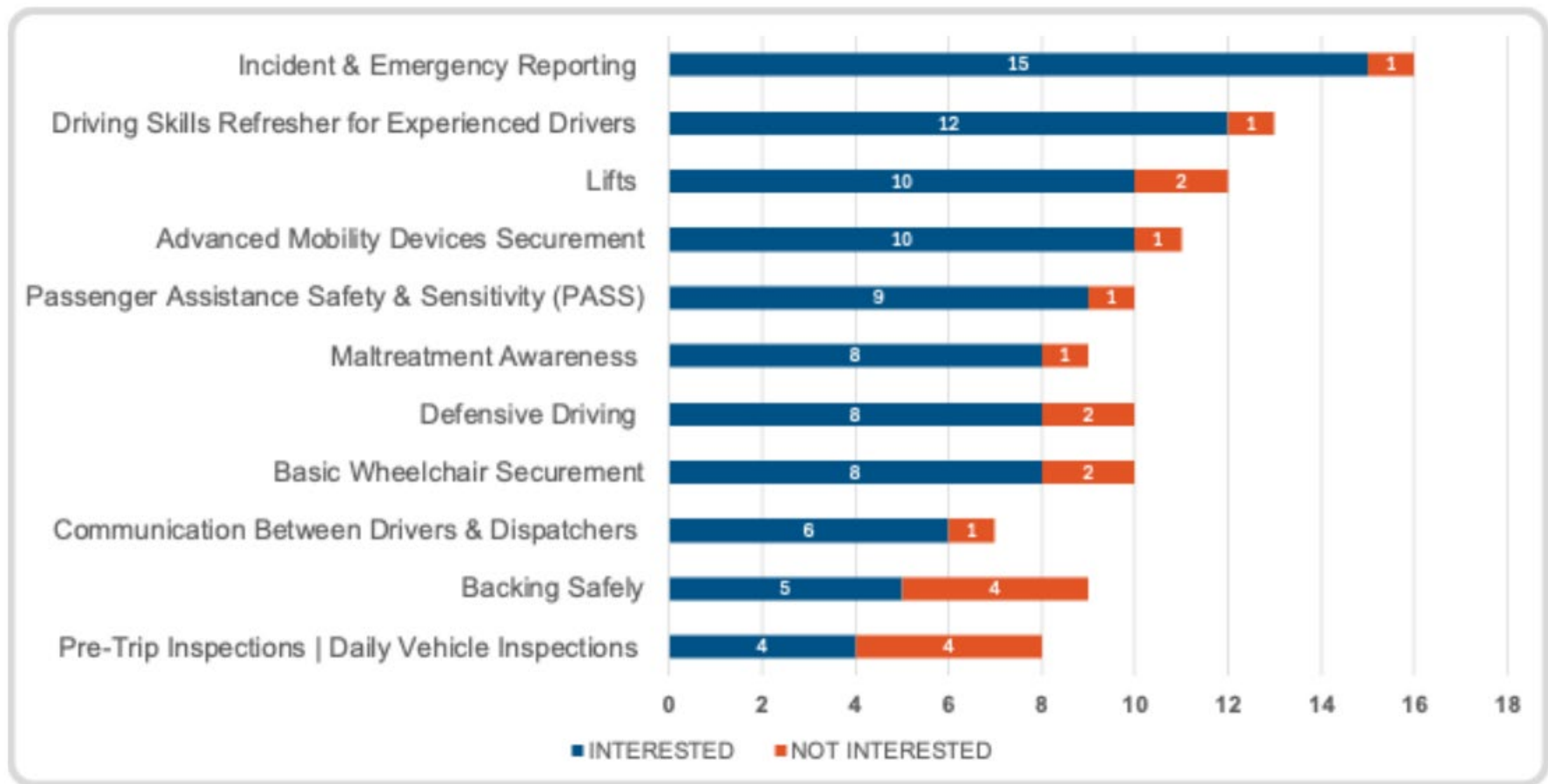
# SURVEY – TRAINING TOPICS (DRIVERS)

## Question 14

Please indicate your interest in the following:



Answered: 17 Skipped: 37



*Note: This chart only shows interested and not interested. Other responses included, neutral, n/a, and unsure.*

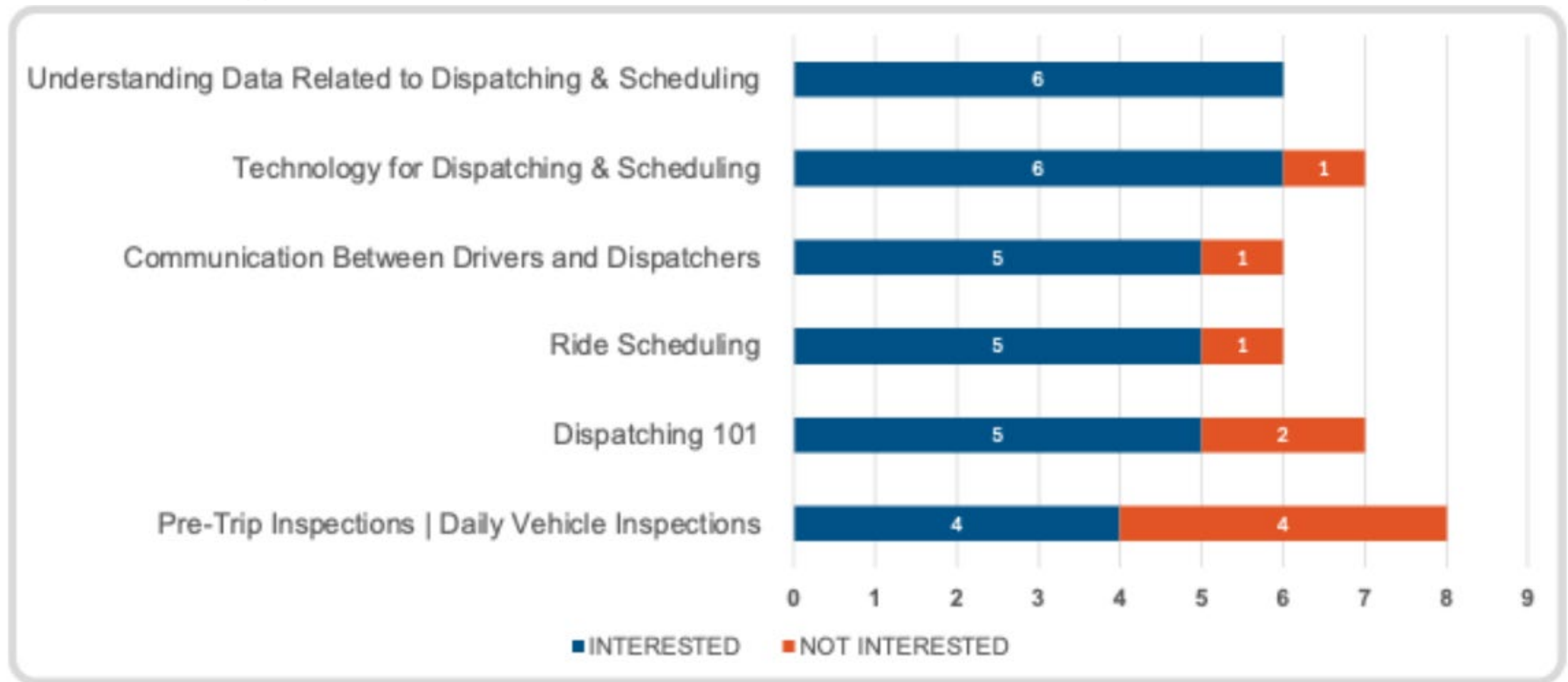
# SURVEY – TRAINING TOPICS (DISPATCHERS/SCHEDULERS)

## Question 17



Please indicate your interest in the following:

Answered: 10    Skipped: 44



*Note: This chart only shows interested and not interested. Other responses included, neutral, n/a, and unsure.*

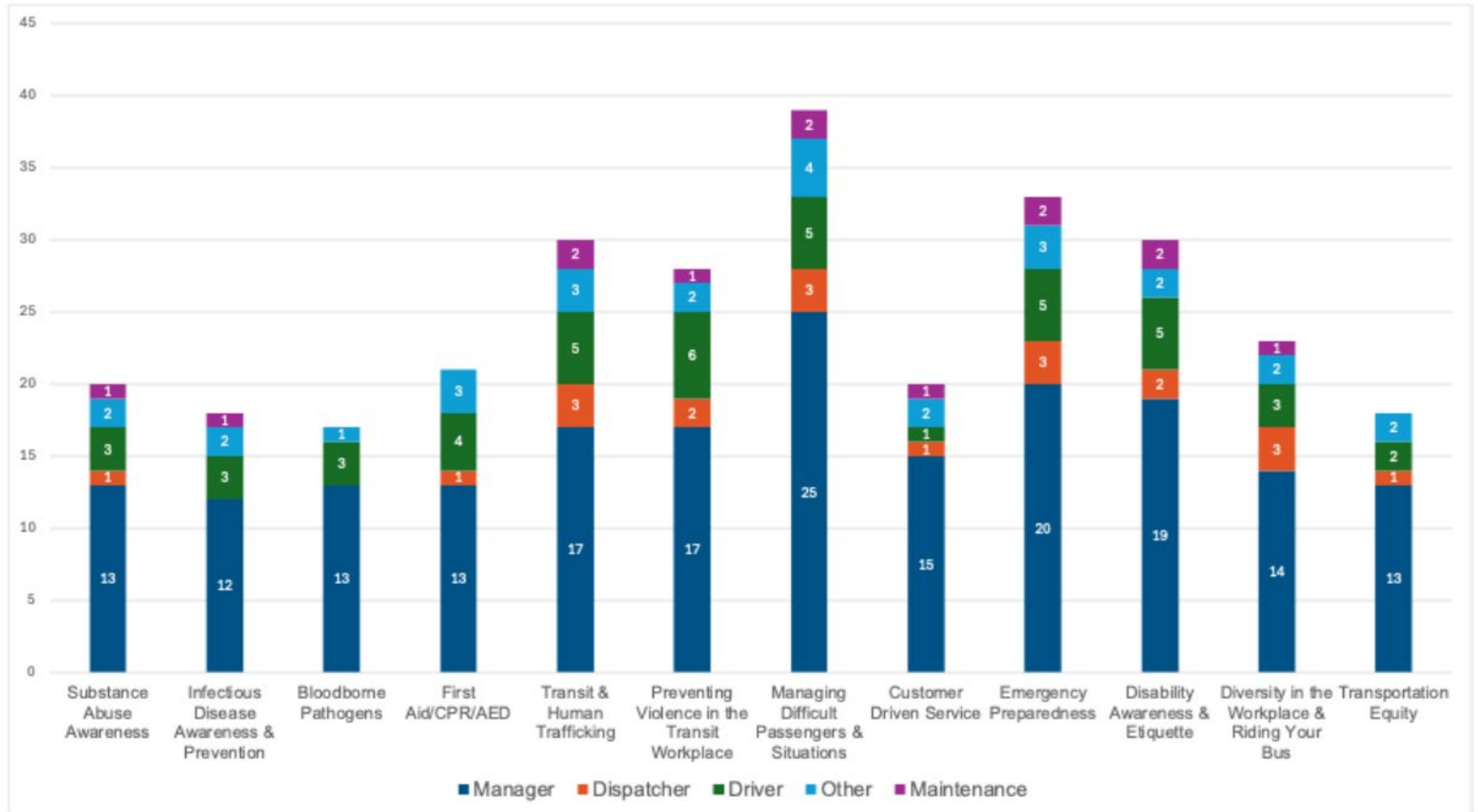
## SURVEY – TRAINING TOP 5 TOPICS BY ROLE



Training	Manager	Dispatcher	Driver
Coordinated Transportation Planning to Meet FTA Requirements	X		
HR Basics	X		
Fleet & Facility Asset Management	X		
NTD Requirements	X		
Drug & Alcohol Program Management	X		
Understanding Data Related to Dispatching & Scheduling		X	
Technology for Dispatching & Scheduling		X	
Communication Between Drivers and Dispatchers		X	
Ride Scheduling		X	
Dispatching 101		X	
Incident & Emergency Reporting			X
Driving Skills Refresher for Experienced Drivers			X
Lifts			X
Advanced Mobility Devices Securement			X
Passenger Assistance Safety & Sensitivity (PASS)			X

# SURVEY – ALL-STAFF TRAINING INTEREST BY ROLE

## Question 27



## SURVEY – KEY ALL-STAFF TOPICS BY ROLE

### Questions 27



#### Managers

Managing Difficult  
Passengers &  
Situations

Emergency  
Preparedness



#### Drivers

Preventing Violence in  
the Transit Workplace

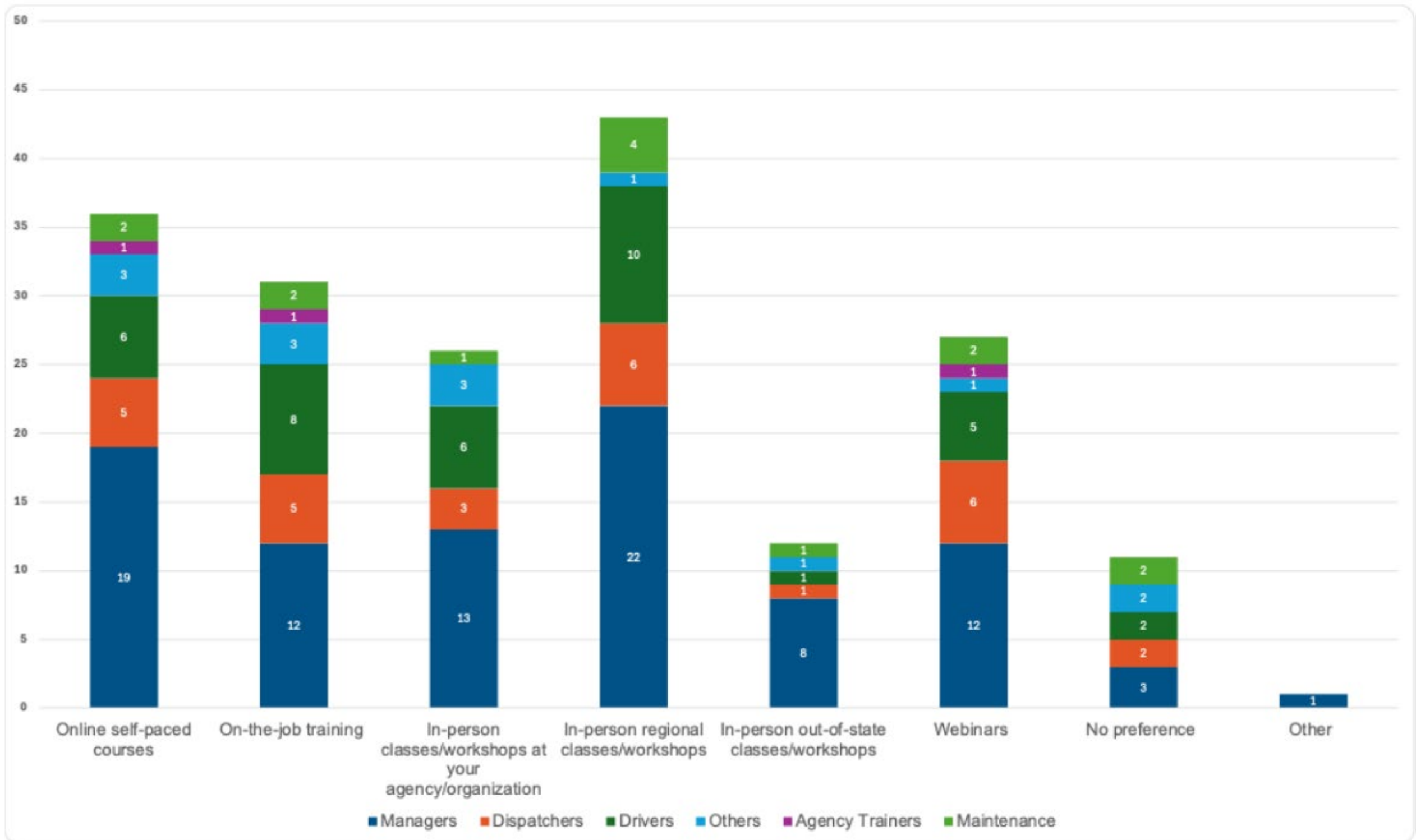
Transit & Human  
Trafficking



#### Dispatchers

Diversity in the  
Workplace & Riding Your  
Bus

# SURVEY – PREFERRED TRAINING DELIVERY METHOD



*Note: This includes responses from other roles on behalf of a role, for example, a manager answering questions about driver preferences.*

# SURVEY – WHEN TO OFFER TRAINING

## Questions 32 & 33



	Managers	Drivers	Dispatchers
Month/ Time of Year	Sept., Oct., April & May (Fall and Spring)	May & Sept. (Fall and Spring)	Sept. & Oct. (Fall)
Days of Week	Tue-Thu (s light preference for Tues day and Wednes day)	Mon-Fri (s light preference for Tues day and Wednes day)	Mon-Fri (s light preference for Monday)
Time of Day	Morning 8-10:59 am	Morning & Mid-Day 8am-2 pm	Mid-Day 11 am-2 pm

### Key Takeaways:

- September and October are the best months for training
- Management prefers mid-week mornings for training
- All role prefer training between 8am and 2pm during weekdays
- Weekends, evenings, and early morning trainings are rarely/never ideal

*Note: The driver and dispatcher categories received fewer responses so it may be worth doing additional surveying to understand their training preferences.*



## WHAT MONTANA RTAP DOES WELL (TOP 5)

### Question 29

What does Montana's Rural Transit Assistance Program (RTAP) do well?

Answered: 40   Skipped: 14

Top 5 areas Montana RTAP does well

1. Instructors are knowledgeable
2. Training prepares me to do my job better
3. Training is easy to comprehend
4. Training includes support materials I can refer to later
5. Scholarship application process

# WHAT MONTANA RTAP DOES WELL (ALL)

## Question 29

What does Montana's Rural Transit Assistance Program (RTAP) do well?

Answered: 40 Skipped: 14



## MONTANA RTAP IMPROVEMENTS (TOP 5)

### Question 30

What would you recommend as improvements to the state's Rural Transportation Assistance Program?

Answered: 40   Skipped: 14

### Top 5 Suggested Improvements

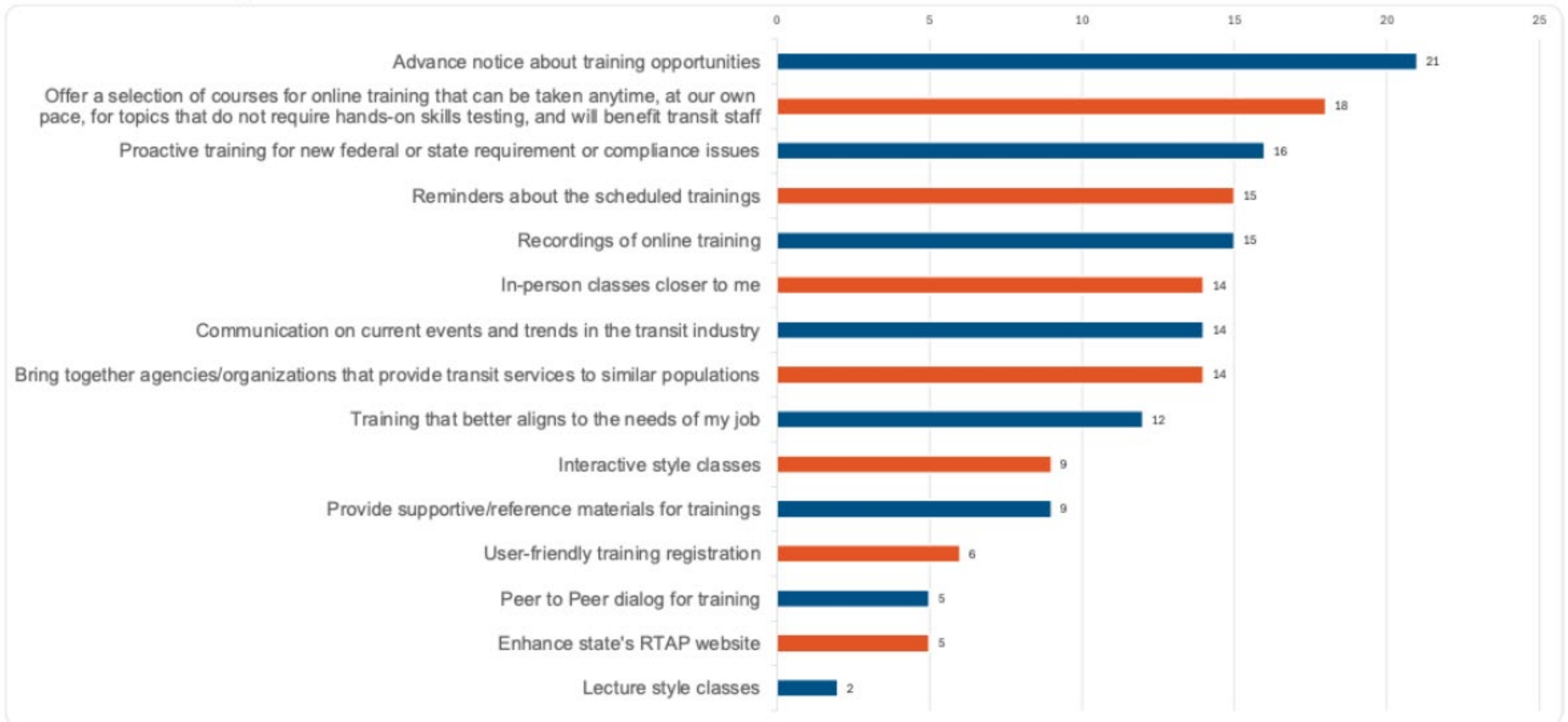
1. **Advance notice** about training opportunities
2. Offer a selection of courses for **online training** that can be taken anytime, at our own pace, for topics that do not require hands-on skills testing, and will benefit transit staff
3. Proactive training for new **federal or state requirement or compliance issues**
4. **Reminders** about the scheduled trainings
5. **Recordings** of online training

# MONTANA RTAP IMPROVEMENTS (ALL)

## Question 30

What would you recommend as improvements to the state's Rural Transportation Assistance Program?

Answered: 40 Skipped: 14



## INITIAL THOUGHTS

### SURVEY

- Survey response was good, despite it being summer
- We are assessing gaps in the responses for additional conversation at the focus groups

### TRAINING

- Training delivery preference is a mix of regional in-person training with webinars and online training
- Month, day, and time of training varies by role
- Most training was highly rated, but there are clear priorities for training across job roles

### RTAP

- Conflicting responses about what the MDT program is doing well & areas for improvement
- In general, responders are not aware of National RTAP resources

## CONTIUED EFFORTS & PRIORITIES

- Evaluating the data received
- Identifying gaps for conversation at focus groups
- Initiating annual training plan content
  - based on top training interests
  - based on priority categories
  - look for common themes across all job classifications
- Initiating SWOT analysis based on the data received from the survey & the focus group engagement