Oregon

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MEMORANDUM

DATE: November 1, 2010

TO: Michael Ward, PTD Administrator
For: Oregon Public Transit Advisory Committee

FROM: Jean Palmateer, STF Program Manager
Joni Bramlett, Capital Program Manager
Lee K. Lazaro, Operations & Policy Analyst

RE: **Report – STF Discussion Forums**

Background

The roles and responsibilities of public transit agencies and transportation service providers in Oregon is growing and evolving. With that evolution come new challenges, and new opportunities for STF Agencies and transit agencies.

PTD staff noticed that STF Agencies and transit agencies appear to be experiencing increased stress, as demonstrated by limited oversight of contracts, inconsistent reporting, lack of understanding of grant requirements, and other indicators. These problems are not limited to small transit agencies with limited staff – they also appear in larger transit agencies.

With respect to the Older Adults and People with Disabilities programs (5310 and STF; also JARC and New Freedom) Program Managers Joni Bramlett and Jean Palmateer decided to host a series of Discussion Forums throughout the state to explore these issues. The timing of the forums was prior to the 2011-2013 Discretionary Grant program announcements, so that if there were significant concerns regarding the programs or roles and responsibilities, PTD would be able to address the issues in the 2011-13 program design.

Forum Results

A series of five STF Discussion Forums were held during the past summer in La Grande, Salem, Medford, Redmond and Portland. A total of 72 people attended the meetings, which included STF Agency representatives; lead transit agencies; sub-recipient transit providers; and some industry vendors.

The focus of these meetings was to explore, with the agencies in attendance, the following issues:

1. *Are the requirements for the STF Agencies understood?*

This question pertained to the requirements of the STF Agency as defined by STF law (planning, program management, oversight, reports, etc.); and the activities associated with the federal programs, primarily 5310 (planning, discretionary grant program management, other lead agency obligations).

Responses:

- Yes, STF Agencies generally understand what they are required to do. Agencies also expressed that they like the way the STF and 5310 programs are designed. The program design provides ample local control and opportunity for developing local transit services, because the two funding sources can be planned in conjunction with each other. Transit agencies in attendance generally agreed that the program design met their needs.

- STF Agencies and transit agencies expressed that the roles/responsibilities of the STF Advisory committees was sometimes difficult to manage – primarily due to lack of clear direction to STF Committee by the STF Agency. Guidance from PTD was requested.

2. *What are the STF Agency limitations to meeting these requirements?*

This question pertained to what PTD staff members have observed in terms of late reports, lack of oversight, etc. (This question was also discussed with the transit provider agencies who have similar problems.)

Responses:

- STF Agencies expressed that time available to manage the program is very limited, particularly as the numbers of grants managed has increased in recent years. Many of the forum participants carry multiple program responsibilities, of which transit is only one. Some counties stated that they also have hiring limitations: positions are not being filled, and qualified staff is hard to find.

- STF Agencies expressed that the $2,000 administrative funds provided by the STF program is not sufficient to pay for program management. PTD staff noted that agencies are not prohibited from directing more STF funds to administration, or charging an administrative component to all grants, to help cover costs. Most agencies stated that they did not wish to "cut" into existing grant funds for this purpose, and thus reduce the amount of funds going to operations/service provision.

- STF Agencies and lead agencies expressed interest in expanding their roles, particularly with respect to owning the fleet for the regional area and leasing vehicles to providers. However, several did not think that their governing boards

would approve of that role change as it increases oversight responsibility and may negatively impact relationships between agencies.

- Tribal STF Agencies have unique needs and issues, including politics and communication with tribal councils.

3. *What may PTD do to assist STF Agencies in meeting requirements?*

Responses:

- Agencies generally agreed that more attention and resources directed to administration would improve the programs.

- Many participants appreciated the technical support previously provided by the Association of Oregon Counties (AOC) with respect to the Coordinated Plan development. Participants recommend that AOC provide agencies with Coordinated Plan update assistance, and also explore providing assistance as needed in management of the grant programs.

- PTD needs to get out in front of new programs and policies, and communicate early and clearly regarding any changes.

- PTD needs to be more "hands-on" with agencies, making site visits and also spending more time with tribes.

- PTD should sponsor regular meetings at regional levels to foster coordination and peer assistance.

- Participants expressed appreciation for PTD support in the procurement of vehicles, such as the state price agreements, and the new guidance documents for asset preventive maintenance.

- Participants were generally lukewarm to additional money for administration as they recognize that the funds, even if dedicated for that purpose by PTD, would ultimately still come from existing grant programs and thus would reduce funds for operations/service provision.

4. *What are other issues or concerns for STF Agencies?*

Responses:

- Grant reporting came up over and over, in many contexts, and at all five sessions:
    - Quarterly reporting is one activity cited as causing time and stress to both STF Agencies and transit providers;
    - Participants stated that the time spent on reporting has greatly increased;

- Coordinating reporting activities between entities is confusing;
- Agencies questioned the usefulness of some information required;
- A big learning curve for the forms and process is required;
- There is a perceived lack of compassion by PTD staff for agency struggles with reporting.
- At one session attended by smaller STF Agencies, the agencies expressed support of the new report and reimbursement request forms, but not the Budget Detail Worksheet.

- Unfamiliarity of PTD staff – many new names and lack of knowledge regarding staff assignments.

- Participants expressed mixed feeling regarding communication. In some sessions, participants expressed that PTD communications to agencies are muddled and inconsistent; but in other sessions, participants felt communication is clear and changes are well-communicated.

- Participants stated that they liked and appreciated the increased e-mail contact with PTD staff related to training and other program management notices.

- Participants generally like the content of the PTD website.

- Participants like the training programs offered by PTD, and want more.

5. *What are good outcome measures for elderly and disabled transportation services?*

This question pertained specifically to reporting STF/STO program progress, performance, service, and expenditures, but could also address measures for other funds.

Responses:

- All sessions identified transit performance "basics" – E&D rides, one-way trips, hours of service, miles traveled, cost-per-mile and cost-per-ride

- There was widely varied input on additional performance measures, although most participants agreed that qualitative performance measures would be useful, if the data is available.

- Participants want to use anecdotal information (e.g. transit stories); generally understood that anecdotal information is not statistically relevant, but is useful for certain purposes such as for Legislators.

- Issues identified related to collecting qualitative data are:
  - Difficult to gather qualitative data from customers;

- Data should measure mobility – how does mobility improve the quality of life, allow seniors to stay in their homes longer? For example, reduced medical and care-giving costs.
- Participants at all five sessions recommended a standardized on-board customer survey tool, with instructions and training to capture information from riders – PTD could assist in funding development of this tool.

➢ Concerns regarding the use of data reported:

- Participants expressed concern regarding use of data: who would be receiving it, in what context?
- PTD should avoid comparing transit agencies and communities against each other – comparisons should be within the agency (i.e. year-to-year, community-to-community).
- Performance comparisons can make rural transit look inefficient, because of long distances traveled and relatively lower ridership than in urban areas.
- Tribal concerns: workload data was gathered in the past; lots of effort made to collect it; data was never used and no service enhancement came out of it; also, tribal council permission would be required to survey members.

➢ How often should STO/STF progress be reported, and who should report?

- Annual reporting was the nearly unanimous consensus at all sessions;
- It was generally agreed that STF Agencies should be responsible for data-gathering from providers, and reporting milestones and performance to PTD.