

## Chapter 12 – Training

The Office of Public Transit (OPT) administers the [Rural Transit Assistance Program \(RTAP\)](#), along with state funding programmed by the Iowa DOT, to sponsor fellowships and to conduct/coordinate transit training sessions for the transit community. Training opportunities are available to all public transit personnel, their service contractors, and planners. Transit managers are encouraged to provide **OPT's compliance and training officer** with suggestions for training seminar topics and specific courses that would enhance the professional skills of transit staff and to meet the needs of the transit community. OPT's objective is to coordinate with the transit community to provide the best possible training program and opportunities.

**Technical assistance** is provided through new manager orientation, compliance reviews and on-site monitoring of all small urban and regional transit systems. Recommendations for areas of improvement with emphasis on additional training are offered as a follow-up to ensure compliance with state and federal regulations. OPT staff are available for day-to-day assistance, sensitivity analysis, and regulatory investigations. Technical assistance on procurement/contracts and specifications are also available from the OPT.

**The Office of Public Transit Website** was developed to provide a source of information to transit systems and the public. The [website](#) includes information and resources on the criteria and application process for all of the programs administered by OPT, information on each of the transit systems, the Iowa Transportation Coordination Council, links to FTA rules and regulations, and much more. Transit Agencies are encourage to check OPT's website resources on a regular basis.

**The OPT Peer-to-Peer Program** is an opportunity for new transit managers to consult with experienced transit managers. OPT provides new transit staff the contact information of other transit system staff to whom they can direct questions, and OPT recommends that they use these contacts as problems arise. This peer-to-peer network expands to include existing staff interested in learning how other transit systems operate or more about specific project related information. Transit staff may choose to visit another system to learn new or different techniques regarding transit-related issues. It may also be used as a resource for transit staff to improve and enhance job skills. Alternately, a transit manager may invite a peer to visit their system to troubleshoot or offer advice. Expenses incurred by a peer-to-peer visit could qualify for an [Iowa Transit Training Fellowship](#) (staff salary is not eligible for reimbursement). To discuss a peer-to-peer contact, please contact the OPT [compliance and training officer](#).

### **Multi-State Technical Assistance Program (MTAP)**

The Iowa DOT is a member of [MTAP](#). Founded under the [American Association of State Highway and Transportation Officials \(AASHTO\)](#), and the [Standing Committee on Transportation \(SCOPT\)](#), MTAP is a network of states that provide a forum for state level discussion of public transportation issues and sharing of technical expertise on transit topics. For issues related to MTAP, please contact OPT [Director Michelle McEnany](#).

### **Iowa Public Transit Association (IPTA)**

[The Iowa Public Transit Association](#) advocates, unifies, and advances the interests of Iowa public transit systems. This professional organization also supports the professional development and improvement of the member transit systems by providing industry information, training, technical assistance, and other opportunities for networking, collaboration, and sharing of ideas and best practices.

**IPTA/Iowa DOT Transit Training Conferences** - Iowa DOT contracts with the IPTA to hold a minimum of three transit training conferences each year, which are open to all Iowa public transit systems - urban and rural. These conferences are funded by RTAP and State Transit Assistance with no or minimal registration fees. Sessions are offered on a variety of topics to meet the interest of all systems, large and small. At least once each year, an Expo is included. The Expo offers an exhibition of

vendors and equipment. It also allows conference participants the opportunity to talk with vendors and manufacturer representatives, and preview actual vehicles available for purchase.

**IPTA/Iowa DOT Transit Roadeo** - The Iowa DOT and IPTA sponsor an annual Transit Roadeo to promote and provide recognition for safe driving skills by Iowa's public transit vehicle operators. Transit operators from around the state meet at the current year's host site to compete and demonstrate their safe driving skills. Each operator performs a series of maneuvers that represent many of the actual situations they face as they carry out their daily duties. Funding for the roadeo is provided through RTAP and STA.

IPTA members, OPT staff, local organizations and volunteer groups provide judging for the competition. Competition is broken out into two categories: large bus and small bus. *Winners are offered an opportunity to represent the state of Iowa and their transit system on a 100% Iowa Transit Training Fellowship at the national or international competition.* Winners of the large bus category may compete at the next [American Public Transit Association \(APTA\)](#) National Roadeo conducted in conjunction with its annual meeting. Winners of the small bus category may compete in the [Community Transportation Association of America \(CTAA\)](#) sponsored Community Transportation Roadeo competition. Competitors in either national roadeo may participate at member rates when representing a transit system member of either APTA or CTAA.

### **Rural Transit Assistance Program (RTAP)**

Congress authorized the formation of the Rural Transit Assistance Program (RTAP) funded through the Federal Transit Administration (FTA). RTAP was established to offer a coordinated program in rural areas (under 50,000 population) for training, technical assistance, and research opportunities as well as other support services to improve the delivery of transit services by small urban and rural transit operators. FTA uses RTAP funding to support both a national level RTAP program, which is administered by the Neponset Valley TMA, and separate state level programs in each state.

The objectives of the RTAP are:

- to promote the safe and effective delivery of public transportation in rural areas and to make more efficient use of public and private resources;
- to foster the development of state and local capacity for addressing the training and technical assistance needs of the rural transportation community;
- to improve the quality of information and technical assistance available through the development of training, technology, and technical assistance resource materials;
- to facilitate peer-to-peer self-help through the development of local networks of transit professionals;
- to support the coordination of public, private, specialized, and human service transportation services; and,
- to build a national database on the rural segment of the public transportation industry.

**RTAP National Program** – At the national level, a steering committee guides the development of [National RTAP products and services](#) including: training materials, technical assistance briefs, peer-to-peer technical assistance network, web applications, and a National RTAP Chat, E-mail and Hotline.

- **Training materials** have been developed on a number of subjects that cover either new requirements or areas where there was a perceived lack of existing resources. These materials may include a video presentation, an instructor manual, and participant workbooks.
- **Technical Assistance Briefs** are a series of briefing papers designed to keep rural transit informed. These briefs include legislative and regulatory updates, as well as topics of specific interest to rural transit operators. The briefs also incorporate material that has been presented at workshops.
- The **peer-to-peer network** was established to allow local transit systems to access the knowledge base of other local transit professionals who have expertise on specific topics. Most peer assistance takes the form of technical assistance via telephone or e-mail.

- **Web applications** assisting small urban and rural transit agencies with website development and procurement are also available from National RTAP.
- **A National RTAP Chat, E-mail and Hotline**, offers answers to transit related questions, provides referrals to the peer network, and helps disseminate technical assistance and training materials. To receive more information, call a National RTAP specialist at 1-888-589-6821 or go to the [National RTAP](#) website for chat and e-mail capabilities.

**RTAP State Program** – OPT receives a portion of the state level RTAP funding based on Iowa's share of the nation's non-urbanized population. In consultation with IPTA, OPT commits Iowa's share of RTAP funding to technical assistance projects and training. OPT offers a video lending library, sponsors transit specific training seminars, assists with on-site training, coordinates a peer-to-peer program, sponsors an annual Transit Roadeo, and administers the Iowa Transit Training Fellowship Program, which can also be found in this chapter of the handbook.

**Marketing and Advocacy Information** – Marketing and advocacy assistance is provided through the OPT to help transit systems in their effort to increase public awareness and ridership. Along with brochures and various marketing materials, the Iowa DOT has produced, using RTAP funds, two videos that are offered free of charge to the public.

1. [Your Ticket to Safety: Blood Borne Pathogen Awareness for Transit Professionals \(1993\)](#). This blood borne pathogen video discusses hazards involved with contacting body fluids, the appropriate precautions, and clean-up techniques in a passenger transportation setting. It also addresses OSHA requirements and the concept of "universal precautions." [Your Ticket to Safety brochures are available to be downloaded from OPT's website.](#)
2. [Wherever Life Takes You \(2008\)](#) is a state-funded 10-minute video that can be used as a **marketing tool, also available on OPT's website.**
3. [Public Transportation Service in Iowa](#) (standard or large print) is a brochure, funded by the DOT **that lists the names and locations of Iowa's transit systems, Rideshare programs, and intercity bus carriers. These brochures are downloadable from OPT's website, or a hardcopy can be obtained by contacting OPT's administrative assistant.**
4. *Various other state-funded marketing materials*, as available, such as brochures, activity books, calendar strips, or other seasonal materials, can be ordered by contacting the OPT [administrative assistant](#), or downloading from the OPT publications and studies [website](#).

**RTAP-Funded Training Seminars** – OPT sponsors training sessions on transit topics in part with RTAP funds. These courses range from mini-workshops to multi-day courses on such issues as customer service, management, ADA, drug and alcohol program compliance, procurement or planning. All sessions are offered to Iowa public transit systems and transit planning agencies free of charge or for a nominal registration fee. For more information please see the [Iowa Transit Training Fellowship](#) guidelines in this section of the handbook.

Some of the types of training seminars that have been offered by OPT and conducted in Iowa are:

- Accounting (financial management)
- **American's with Disabilities Act (ADA) Service Requirements**
- Board Training
- Bus Operator Training
- Commercial Drivers Licenses (CDL)
- CTAA Iowa Institute for Transportation Coordination
- Disadvantaged Business Enterprise (DBE)
- Federal Drug and Alcohol Testing Program Requirements
- FTA Funding Programs
- Governmental Cost Allocation Plans and Indirect Cost Rates
- Defensive Driving Certificate Course
- Lift Training

- Mentoring Program (Peer-to-Peer)
- Metropolitan Transportation Planning
- Passenger Assistance Techniques (PAT)
- Procurement
- Rural Transit Management
- Service Planning and Design
- Specialized Transportation Needs
- Third Party Contracting
- Vehicle Maintenance

**RTAP/OPT Lending Library** – Public transit systems in Iowa may access OPT's training video lending library. These training videos (purchased using RTAP funds) aid the transit manager and staff in development and refinement of specific tasks or skills required to effectively operate a rural transportation system. To borrow training videos and other training materials (loaned to identified transit systems only) please contact the [Iowa DOT Library](#).

### **Iowa Transit Training Fellowship Program**

The OPT sponsors transit training fellowships for public transit training for identified Iowa public transit agencies or planning agencies. Federal and state funds are programmed each fiscal year for training fellowships, and are funded from these programs:

- Rural Transit Assistance Program (RTAP) – For all regional and small urban transit systems, and Regional Planning Affiliations (RPAs).
- State Transit Assistance (STA) – For all large urban transit systems, and Metropolitan Planning Organizations (MPOs).

Iowa public transit systems and planning agencies, identified by the DOT, may sponsor their own or subcontractor staff members to attend transit training under an approved fellowship.

In most cases, fellowships are funded at 80% of total allowed costs; i.e. transportation, lodging, and **tuition or registration**. **OPT may, at the office director's discretion, allow reimbursement at a higher percentage for OPT sponsored or other specific training for which participation is strongly encouraged by OPT.** [Iowa Rodeo](#) winners in two categories are eligible for 100% funding to compete in national rodeo competitions.

Effective July 1, 2015, in order to make the most of the staff time spent on processing applications and reimbursements, the Iowa DOT has set a minimum dollar amount for fellowships. No fellowship applications will be accepted for transit training expenses under \$100 total (\$80 federal/state match.) For training opportunities costing under \$100, the planning or transit agency will be responsible for the entire expense.

Transit Training Fellowships are awarded using the following criteria:

- The training is public transit job related;
- The applicant identifies which training sessions they plan to attend and describes how the training will benefit them concerning transit related issues;
- It is cost effective;
- Funds are available; and
- Training is presented by qualified persons with recognized expertise in the area(s) covered.

Transit Training Fellowships will not be awarded for community or regional advocacy and lobbying trips, unless a public transit training component can be demonstrated. The annual IPTA trip to Washington,

DC is eligible for training fellowships as it directly relates to public transit in Iowa and includes a training component by CTAA and/or APTA.

**Application for Training Fellowships** – To apply for a fellowship, an [Application for Iowa Transit Training Fellowship](#) must be completed according to the instructions and requirements stated on Page 2 of the form, and **submitted to OPT at least two weeks prior to the training**. The form must receive the approval of the transit manager, planning director, or other official signatory. The completed form and a copy of the brochure or training information should be emailed or faxed to OPT's [administrative assistant](#).

You will receive an e-mail or letter notification as to whether your request was approved. This notification will also include a fellowship approval number that you will need when requesting payment.

Applications will not be approved if submitted after attending the event, except in extenuating circumstances as approved by the OPT Director.

### **Allowable costs for training fellowships (Receipts are required)**

For a list of allowable and ineligible expenses, please see Instructional Page 2 of the [Application for Iowa Transit Training Fellowship](#). Any cost comparisons that might be requested in the approval process are the responsibility of the applying/sponsoring transit or planning agency to provide.

- **Tuition/Registration** – A registration receipt or other payment verification (extra charges for banquets or food or excursions from the venue are ineligible expenses)
- **Lodging (Hotel/Motel)** – A *detailed* invoice/receipt that shows a zero balance is required. The invoice/receipt must show the cost of a single room per night and how many nights the recipient stayed overnight, and any taxes or expenses. Room expenses that are eligible are: parking, hotel internet and business calls (documented) for business use. Room charges that did not receive preapproval in the application process shall not be allowed (personal calls, valet parking, safe fee, vacation night stays, companion expenses, double room rates, food, tips, alcohol, incidentals, room service, cancelled room, etc.) Allowable single room rates are limited to \$75.00 plus tax within Iowa (unless approved at higher levels) or identified conference hotel rates. Cost comparisons of hotel stays might be requested in the approval process and are the responsibility of the sponsoring transit or planning agency.

Please note: No lodging (hotel/motel) costs will be allowed for training attended within 60 miles of the participating transit employee's base location. (For example, if a transit system's home office is within the 60 mile radius of the training site, the staff from that site would not be reimbursed for lodging through the fellowship program. Registration fees would still be allowed. However, if a transit system has other garages or offices within their region where transit system employees are based, falling outside the 60 mile radius, fellowships would be granted for those employees attending training.)

- **Transportation (To and From Conference)** –
  - **Air:** A detailed copy of the airline receipt must show date traveled and cost for flight, the number of passengers, and any taxes or fees (excess luggage and trip insurance are not allowable expenses)
  - **Car:** The number of eligible miles traveled should be documented (please include web mileage verification) and multiplied by \$0.39 per mile (current state rate). Mileage reimbursement is limited to a maximum of the cost of economy airfare. Ride-sharing is encouraged, but only one person per vehicle can claim the mileage reimbursement. Only direct routes are eligible for reimbursement.
  - **Rental Cars:** Preapproval on rental cars in the application process is required, and a cost comparison will also be required, which includes cost of parking at destination. The cost of a rental car will only be paid up the lowest comparison cost of mileage, bus, shuttle, or other modes of transportation, and will require detailed receipts. Fuel receipts

- will not be considered because rental cars are treated the same as any other car, and only mileage for the most direct route to and from the training site are eligible.
- o **Bus/Cab/Shuttles/:** Cost comparisons including web mileage verification might be requested at time of application. Travel costs only include from airport to hotel venue, or hotel to venue. Excursions not administratively approved at the approval process are not allowable expenses. Receipts should have the number of occupants, company name and contact information, and the date and places of pickup and delivery. Tips and Metro pass balances are not allowable expenses.
  - o **Parking:** Must have a detailed receipt that shows the days and contact information for the parking lot company. Extra days airport parking while on vacation are not eligible, nor is valet parking (unless administratively approved in the application process for health reasons).

Please note: No transportation costs (mileage/rental car expenses, etc.) will be allowed for **training attended within 60 miles of the participating transit employee's base location.** (For example, if a transit system's home office is within the 60 mile radius of the training site, the staff from that site would not be reimbursed for transportation costs through the fellowship program. Registration and parking fees would still be allowed. However, if a transit system has other garages or offices within their region where transit system employees are based, falling outside the 60 mile radius, fellowships would be granted for those employees attending training.)

**Reimbursement of Costs** – A [Transit Request for Reimbursement](#) with the required receipts and documentation must be submitted within 60 days after the event. Payments are made only to the applicant sponsoring transit system or planning agency. No payments to individuals are made, nor are **any direct payments made to subcontractors. The request must be signed by the transit system's designated signatory, the transit manager, or the planning director if the request is for a planning agency.** Fellowship payments must also be reflected on year-end financial reports.

The fellowship approval number must be included on the request form. Send the signed reimbursement request and necessary receipts to:

Office of Public Transit  
Attention: OPT Administrative Assistant  
Iowa Department of Transportation  
800 Lincoln Way  
Ames, Iowa 50010  
Phone: (515)233-7870  
Fax: (515)233-7983

### **Additional Transit Training Fellowship Guidelines**

**College Credit** – Fellowship assistance will not be approved for course work being taken to satisfy **requirements for a college degree or general course work needed to improve a person's job** qualifications. For more instructions, and for a list of allowable and ineligible expenses, please see Page 2 of the [Application for Iowa Transit Training Fellowship](#).

**Cancellation** – If the recipient of a transit training fellowship cannot attend a course/workshop for which registration fees or a room deposit has been paid, the office must be promptly notified. OPT approval must be obtained prior to substituting anyone for the original training fellowship recipient. Expenses may not be billed under a fellowship unless someone approved by OPT actually receives training. Costs of forfeited airline reservations, registration fees, or room deposits are not eligible fellowship expenses.

**Ground transportation** – To minimize ground transportation expenditures, recipients are required to take public transportation, airport limousines or shuttle buses whenever available instead of taxis.

Whenever possible, share ground transportation mode with others. Travel by taxi or rental cars on an exclusive basis should be the last resort.

**Lodging reimbursement** – The single hotel or motel room rate will be reimbursed unless a room is shared by two or more persons each attending under the Iowa Transit Training Fellowships Program. If a rate other than the single room rate is charged, the single room rate must be shown on the bill.

**Foreign travel restriction** – No fellowship shall be awarded for training outside the United States unless the cost of training is less expensive than comparable training available domestically, or if the training is so essential to the transit system that justification for waiving this restriction is accepted by the director of OPT.

**Peer-to-Peer Visits --** Transit staff interested in using the peer-to-peer networking system will be responsible to plan and set up the logistics of the visit. Allowable expenses for peer-to-peer reimbursement must be pre-approved by OPT. There will be no reimbursement for staff time. Along with an [Application for Iowa Transit Training Fellowship](#), you must send a brief description of whom and where you plan to visit and what you intend to learn.

**On-Site Training --** Fellowship assistance may be granted for on-site training to employees of Iowa transit systems, their contracted service providers, and Iowa transit planning agencies. The training must propose a substantial benefit to the public transit system(s).

Costs eligible for on-site training include fees and per diem for the instructor, training room, equipment rental, and other related training needs and materials. In general, refreshments are not eligible costs.

To obtain OPT staff approval to hold on-site training in your area, submit the following application materials to OPT:

1. Completed [Application for Iowa Transit Training Fellowship](#);
2. List of participants to be trained;
3. Workshop information including criteria, outline, and agenda; dates and times of workshops; instructor information;
4. Cost Proposal: an estimated breakdown of total training cost;
5. A brief description of the reason for the workshop; and
6. How the training will benefit the transit **system and employees' skills**.