

RTAP Peer Roundtable Notes Procurement

1/11/23 10–11:30am

Participants & Goals for Meeting:

1. Beth Heinrich, City of Morris
2. Stacy Struck, Prairie Lakes Transit
3. Randy Jahnke, Friendly Rider Transit
4. Jim Krueger, La Crosse MTU
5. Michelle Potter, Arrowhead Transit
6. Alethea Koehler, Stevens County DAC and Swift County DAC
7. Ron Decker, True Transit
8. Jeremy Monahan, Prairie Lakes Transit
9. Cathleen Amick, MnDOT OTAT
10. Collette Hanson, Arrowhead Transit
11. Matti Gurney, MnDOT OTAT
12. Klara Grochulska, MnDOT OTAT
13. Torey Hunkus, MnDOT OTAT
14. Kirk Kuchera, Smart Transit
15. and Jackie Vargas, Smart Transit
16. Tiffany Collins, Central Community Transit
17. Gary Korneck, Metro Bus
18. Mindy Fields, Rolling Hills Transit
19. Kayla Sullivan, Transit Alternatives
20. Melinda Estey, MnDOT OTAT
21. Lori Van Beek, MAT bus
22. Barbara Schreiber, MnDOT OTAT
23. Pat LaCourse, Brown County Heartland Express
24. John Groothuis, MnDOT OTAT
25. Jennie Rowland, Big Woods Transit
26. Beverly Sidlo-Tolliver, Arrowhead Regional Development Commission
27. Paul Coyour, Prairie Five Rides
28. Kayla Neptune, Prairie Five Rides
29. Gary Ludwig, Trailblazer Transit
30. Mariah Kathan, RTAP
31. Berta Hartig, RTAP

Roles

- Moderator: Mariah
- Note taker: Berta
- Process Observer — This person will observe and share what went well with the meeting and what could be better. Randy
- Timekeeper — This person will let us know when there is 5-10 minutes left of the meeting: Stacy
- Parking Lot Attendant — This person will take note of anything that comes up that is off-topic but we want to follow up with: Kayla S.

Summary

After reviewing the ground rules and roles for the meeting, the group discussed the challenges with procurement/what's not working, and what's working well. They then tried to problem solve together.

1. Participants shared their previous experience with procurement and planned procurement for this year and what they wished to get from this session.
 - a. MnDOT staff wanted to learn what kind of help agencies needed and how to be supportive to them.
 - b. Many from agencies struggle with procurement and understanding how to do it correctly. There were a few 5307 agencies that shared what their experience working directly with FTA is like, and many of the things 5311 agencies struggled with were the same things the 5307s struggled with too.
 - c. Many wanted to learn tips that others have learned to make this easier.
 - d. Many from the small agencies struggle with the amount of time it takes to procure something, when they have many things they need to respond to daily, such as responding to accidents, scheduling staff.

2. What's not working/challenges
 - a. **There is confusion about marketing and advertising being one procurement (radio station vs radio; TV station vs TV Station) and confusion on if this is required or recommended by FTA.** It is different than purchasing office supplies. Print doesn't sell digital. TV doesn't sell radio. An office supply store can have multiple products and it makes sense to group that as one procurement and get the best price with the competition. Many rural areas only have one choice for many of their local advertising options – one radio station, one newspaper.
 - b. **There are issues with giving a 30-page package/package contract to a vendor and the vendor doesn't understand it or how to fill out the request.** Some vendors need to hire legal teams and it bogs down the process. They don't have options for who they can bring their vehicles to. There is ONE vendor. Some don't call back and it might be that they don't want to deal with it based on a business decision.
 - c. **Advice for how to help vendors understand:** Some agencies have found it helpful to inform vendors that this is paid for with public dollars and that public transit agencies are held accountable for how they spend public funds. The intention is fair and open competition. Agencies have reported that it is difficult because some vendors walk away and some don't want to make the effort to complete the documents. Gary from Metro Bus said as long as their agency shows a good faith effort for compliance the FTA has taken it as an acceptable process.
 - d. These are Federal requirements. For state requirements - connect your local legislators to ask them to simplify the process.
 - e. **There was a question about when to use sole source.**

3. What is working well? What helps you stay organized, reduce stress?
 - a. There was reference to Wisconsin DOT having a good spreadsheet listing of federal clauses and having a nice checklist for federal requirements that the 5307s found helpful. Will be added as a reference to the MnDOT RTAP website.
 - b. MnDOT has a wonderful procurement site with forms. The forms aren't fillable which is a challenge. Reference documents (Past Procurements / purchasing contracts) and checklists need to be added to the site. If they could provide more of these documents, it would be beneficial.
 - c. National RTAP is a source for information for procurement. There is information in their [Transit Manager Toolkit](#). They also have a resource called [ProcurementPRO](#).
 - d. Talking to others through networking and seeing how they procured similar items is helpful. These seems to be a practice that is occurring amongst the agencies.
 - e. Working with Jean and TPMs is helpful.
 - f. Hiring an accountant (vendor) to do the procurement may be helpful.
 - g. Using a master spreadsheet with a tab for each procurement is helpful. Keeping folders for each year and a list of vendors and reviewing it each year to see if more vendors need to be added. Organizing email for conversations with MnDOT, is encouraged to support process understanding and status. (Best Practice that could be added as a template for reference for others)
 - h. Sending out Request for Quotes or Proposals in one email blast to all vendors is helpful and transparent.
 - i. There was an observation that the larger systems have systems and processes in place. Maybe it would be easier if there was one person who handled procurement for several

agencies. When you are a small agency you as the transit manager have many hats to wear and need to respond to things more urgently – such as scheduling staff , responding to accidents and making bank deposits. Procurement gets pushed down the list.

- j. Arrowhead shared that before they had one person whose only job was to do procurement, they had 4 or 5 people do it and it was a mess.
 - k. Randy shared that he looked in to having Sourcwell from Staples, MN do procurement but wasn't able to do it. Put in Sourcwell as a link as they do have a good database of potential vendors to solicit to.
4. Collaborative Problem Solving and Next Steps
- a. **Need for more training and understanding of procurement, such as the different types of procurement. What documentation is required when you only have one vendor to work with?**
 - b. Share resources, examples and references related to procurements / purchasing.
 - i. Michelle from Arrowhead will share her log and examples of small purchases
 - c. **What's allowable and doable – will share this with Jean Meyer, OTAT.**
 - i. Does marketing have to be bundled in one large procurement, or can it be by specific market outreach type (TV, Newspaper, Radio)
 - ii. Can there be a shared procurement person for multiple agencies?
 - iii. What documentation is required for what type of purchase / procurement. – clarify, check list and examples would be beneficial to the agencies.
 - iv. Randy J needs help with the DBE Part E form – possibly others?
 - d. In-person Walk through meetings. Can someone come for a week? Maybe regional and assist?.
 - e. Best Practices listing of approved examples would be well received and utilized.
5. Upcoming Peer Roundtables — The goal is to give more notice. Can move a topic in there if something is more pressing. Can also revisit topics if you want. Participants were encouraged to email Mariah with ideas at any time. **RTAP/DRB to update calendar invites with topics.**

Feb – Employee Motivation

March – Marketing

April – Staff discipline

May – Accident/Incident response

June – Micro Transit

6. Roundtable facilitation: RTAP is currently facilitating. Mariah invited others to facilitate. It provides participants with the chance to have the conversations they want to have. RTAP can help with the PowerPoint if that assistance is needed. Jeremy said he'd follow up off-line.

Next Meeting: February 8, 2023