Using TAMPLATE to Create a TAM Plan

April 28, 2022

TRANSIT ASSET MANAGEMENT

Tamalynn Kennedy

TAM Program Manager

Federal Transit Administration

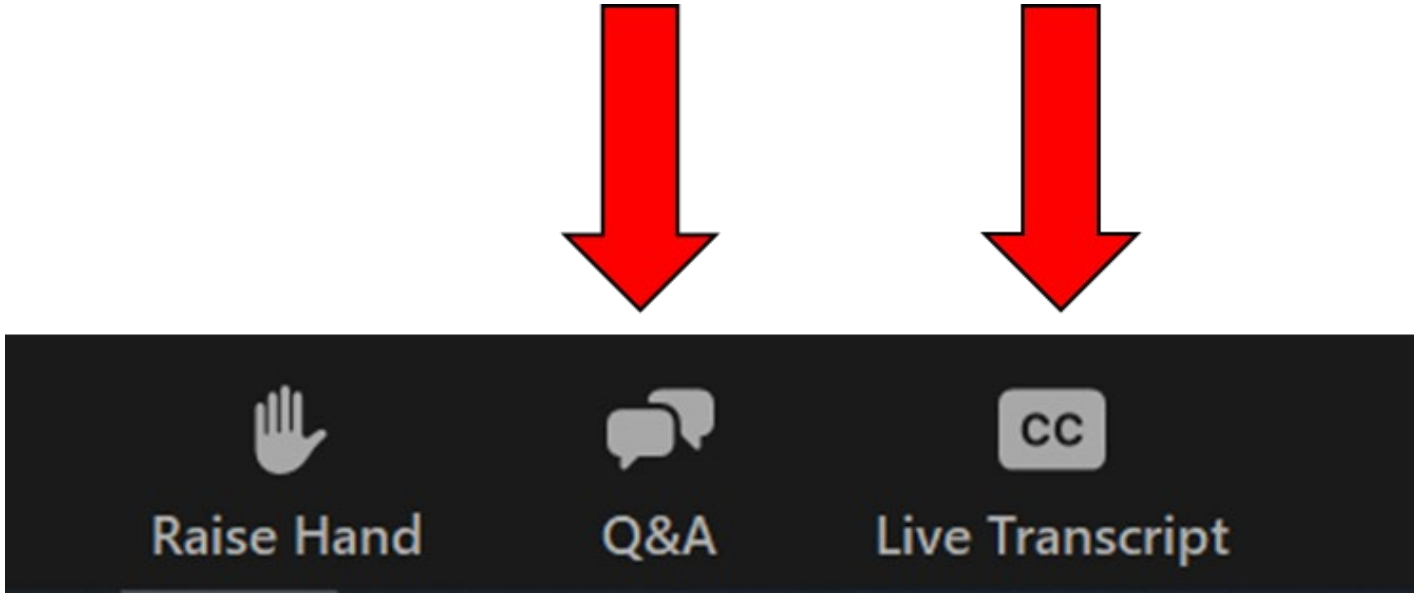
FTA
FEDERAL TRANSIT ADMINISTRATION

U.S. Department of Transportation
Federal Transit Administration

Presentation Materials and Zoom Functionality

www.transit.dot.gov/TAM

Select "TAM Events" in the sidebar and navigate to "Webinar Materials"



TAM Updates

- First required TAM Plan update is due October 1, 2022
- 2022 FTA Transit Asset Management (TAM) Virtual Roundtable

Today's Agenda

Today's webinar includes a tutorial and a user review of the TAM PLanning Asset TemplatE know as TAMPLATE

- The tutorial will highlight:
  - Recent Updates and Enhancements
  - Using TAMPLATE for the 2022 TAM Plan Update
  - Future Updates and Enhancements
- Kyle Laird, PART
- Questions

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TAMPLATE Tutorial

U.S. Department of Transportation
Federal Transit Administration

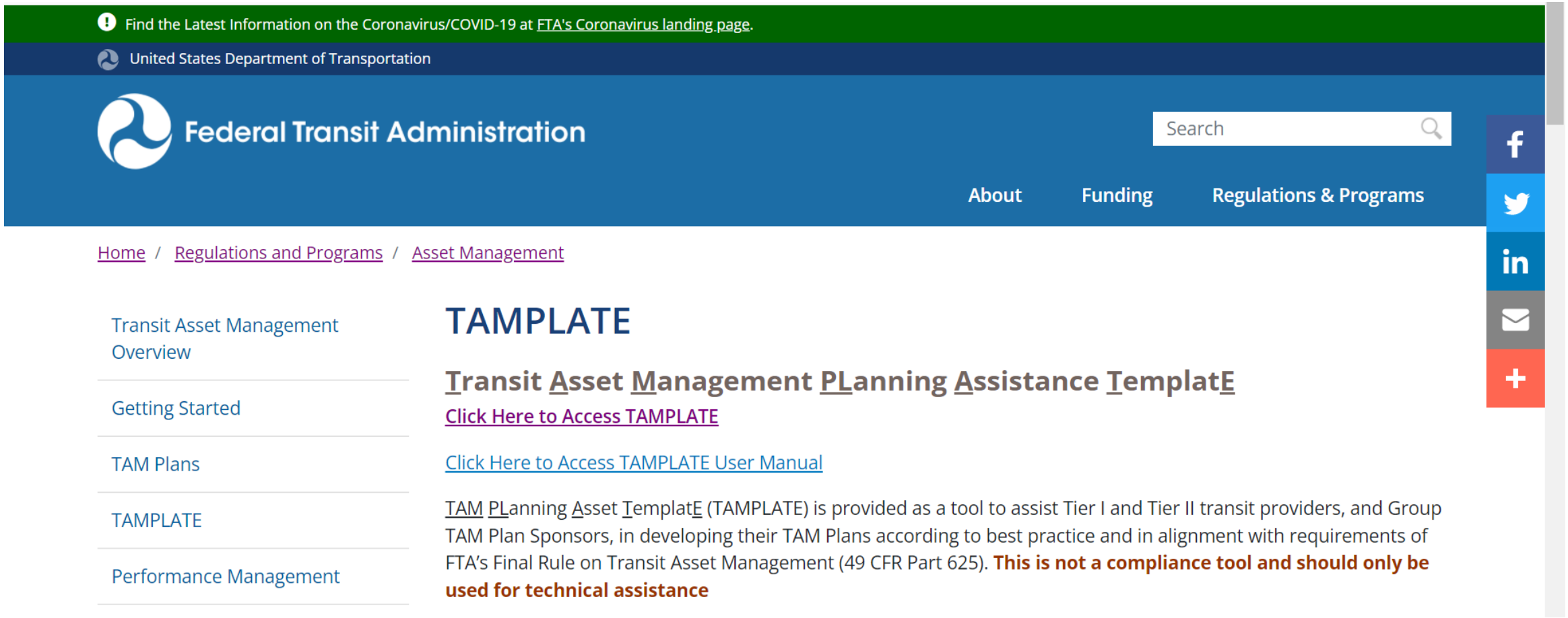
Poll 1

Overview of TAMPLATE

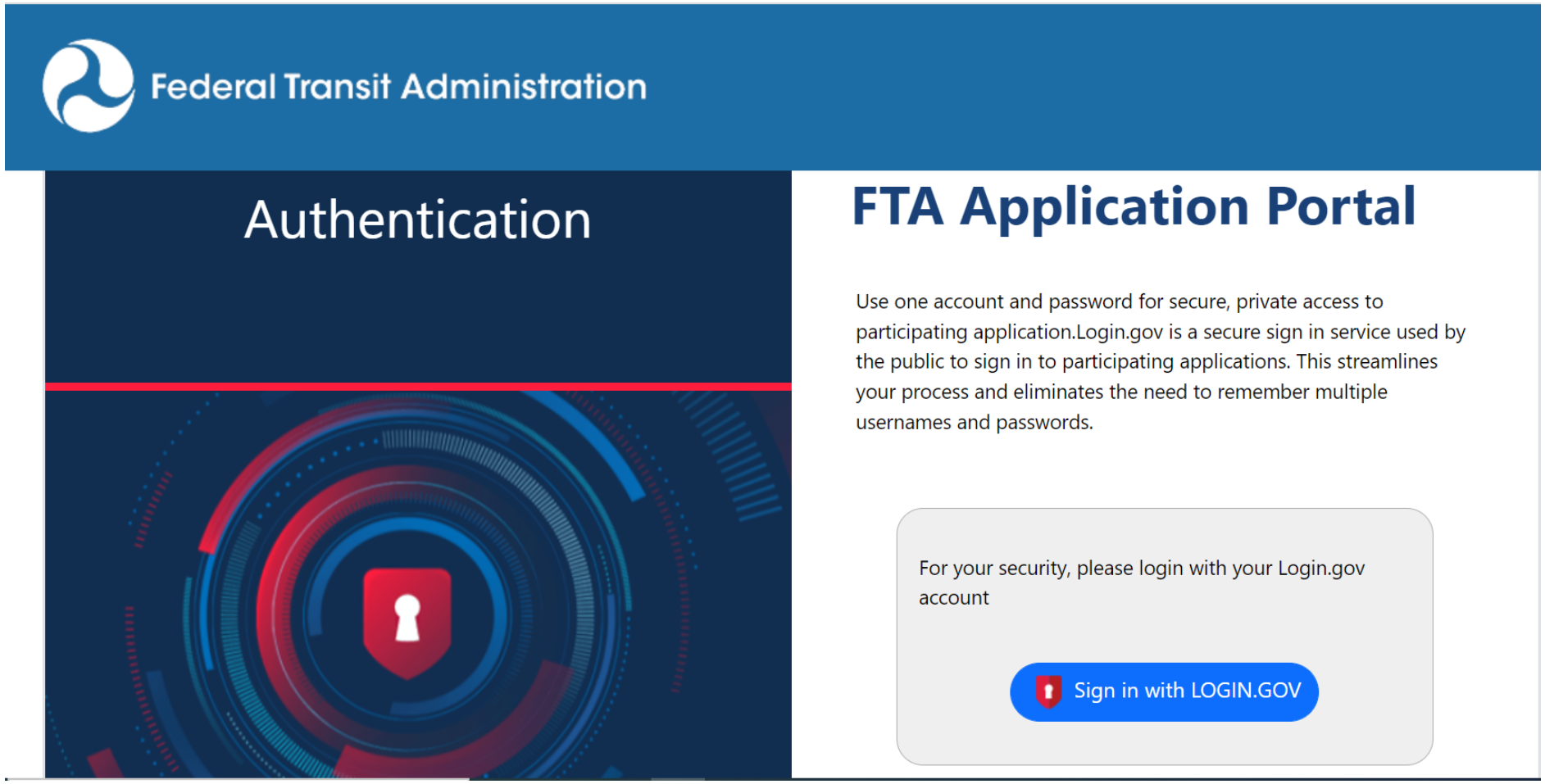
- Technical assistance resource to help transit providers develop TAM plans in alignment with the Final Rule on TAM (49 CFR Part 625)
- Ability to download your most recently published agency data from NTD
- TAMPLATE application is designed for any user, it is likely to be most helpful for
  - Tier II transit providers developing their own individual plans, or
  - Group TAM Plan Sponsors developing plans for subrecipients

Accessing TAMPLATE

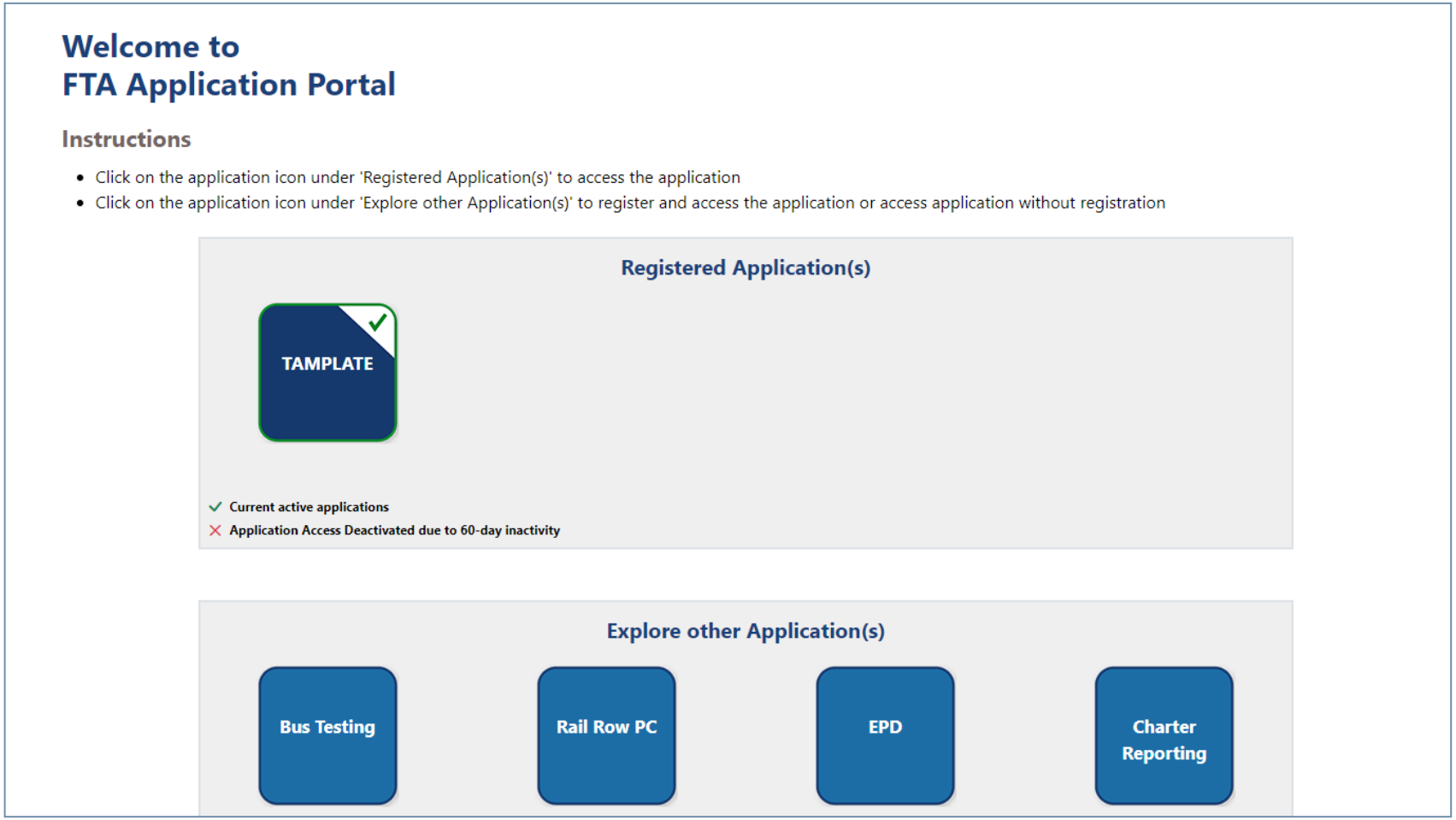
www.transit.dot.gov/TAM



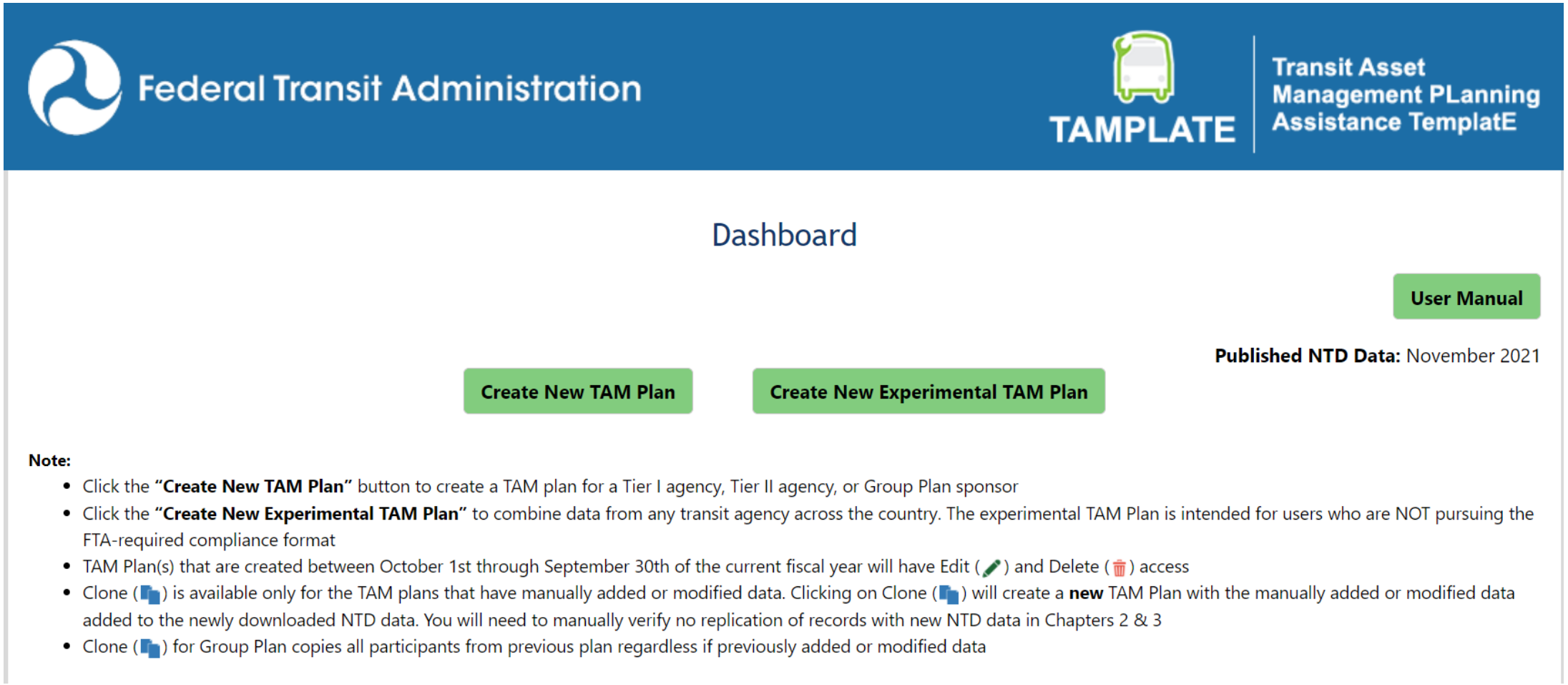
Creating a User Account



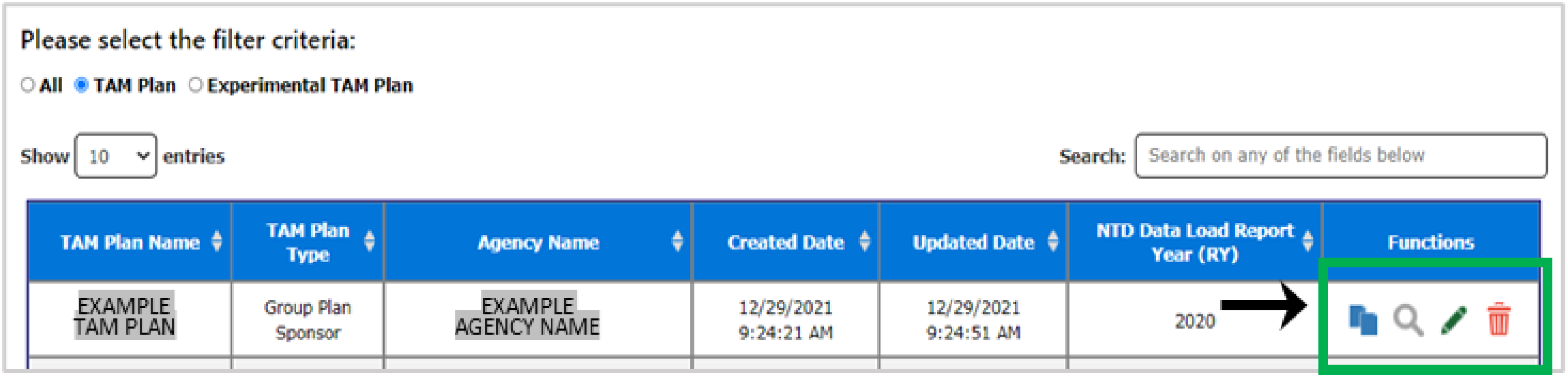
Creating a User Account



Creating a New TAM Plan



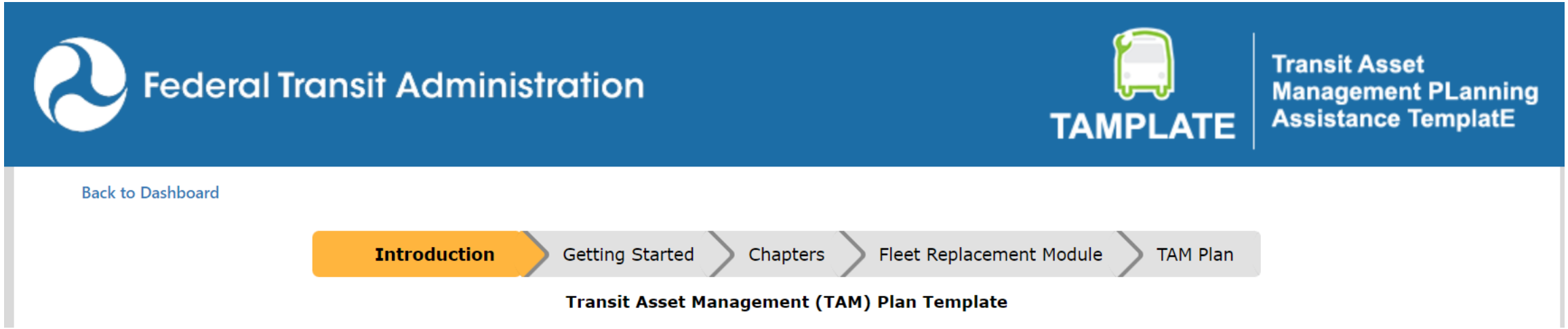
Modifying an Existing Plan



Cloning ( ) a plan creates a duplicate copy of a plan. This function is available for current plans in which you modified the downloaded NTD data within TAMPLATE as well as older plans created before October 1 of the current fiscal year.

Editing ( ) a plan will open the plan in TAMPLATE so that you can continue or modify the draft plan. This option is only available for plans created or cloned on or after October 1 in the current fiscal year.

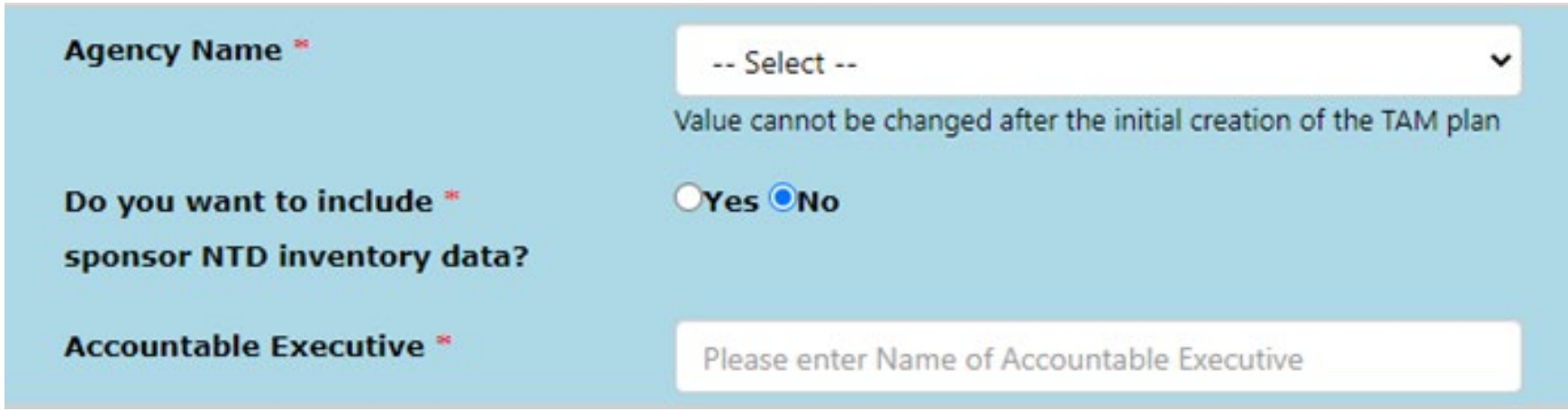
Getting Started

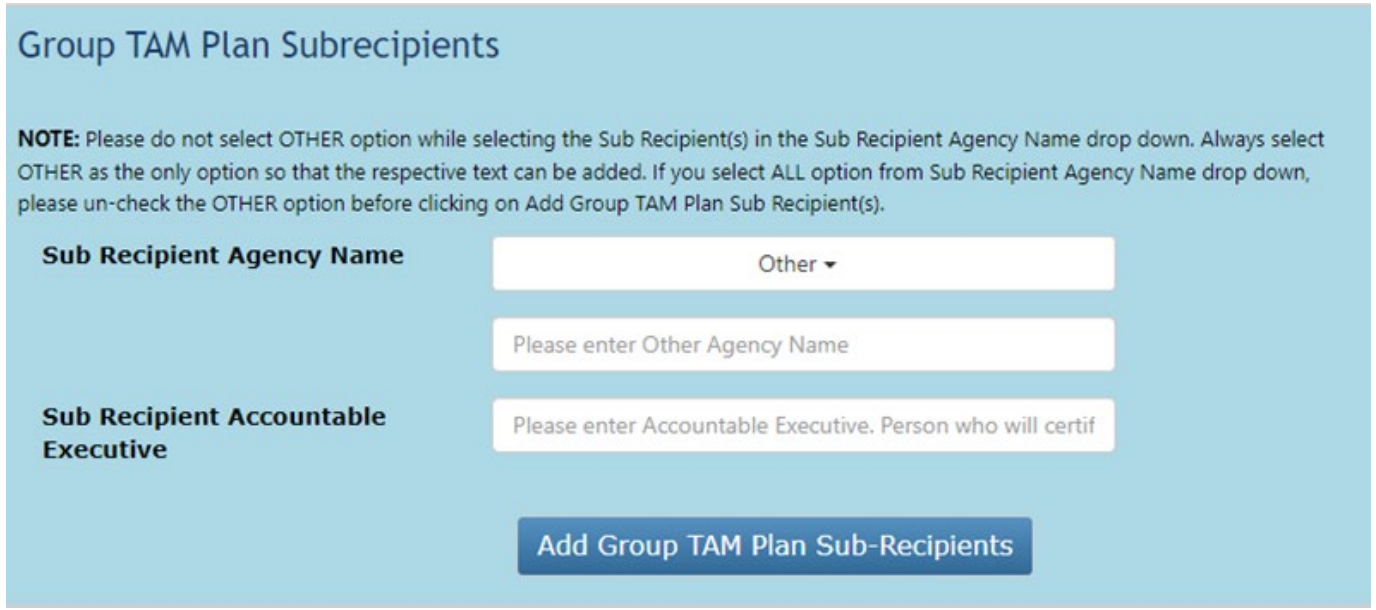


Getting Started

FIELD	INSTRUCTIONS
TAM Plan Name	Enter a name for your TAM plan. This name will appear in the list of saved plans on the TAMPLATE Dashboard.
TAM Plan Type	Select Tier I, Tier II, or Group Plan Sponsor.
Agency Name	Select your own agency's name from the drop-down menu.
Include Sponsor NTD Inventory Data	For Group Plan Sponsors: select "Yes" to include your agency's own asset data in addition to subrecipient data or select "No" to include subrecipient data only.
Accountable Executive	Enter the name of the person who will approve the final TAM plan.
Last Modified Date	If creating a new plan, select today's date.

Getting Started

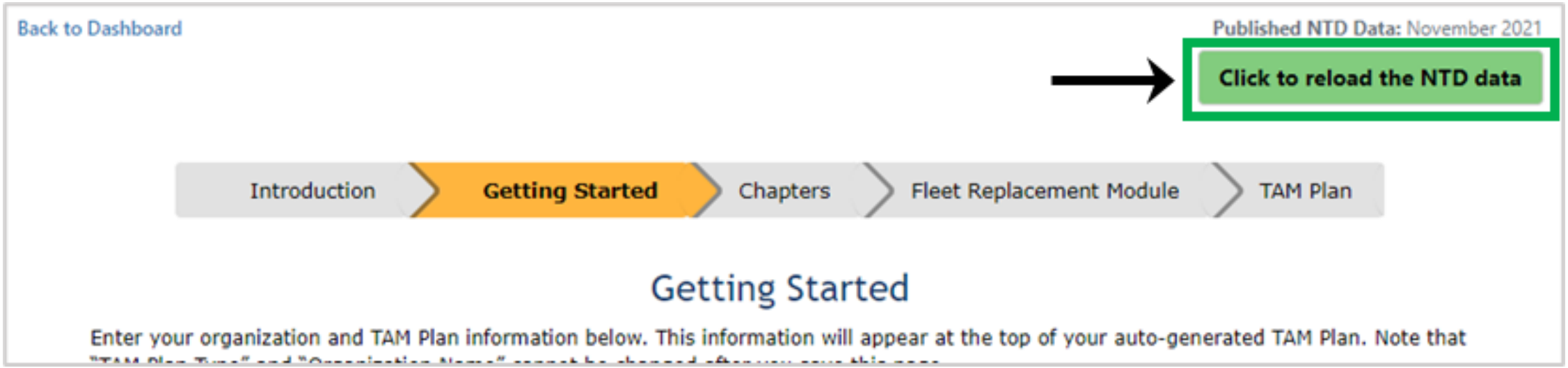




Getting Started

TAMPLATE Chapter	TAMPLATE Tab	TAM Plan Element(s)	Tier I	Tier II & Group Plan Sponsors
Chapter 1: Introduction	Basics	*N/A*	Required	Required
	Goals	*N/A*	Optional	Optional
	Policies & Evaluation	*#5: TAM & SGR policy* *#9: Evaluation plan*	Required	Optional
	Roles & Responsibilities	*#8: Identification of resources*	Required	Optional

NTD Data


Back to Dashboard
Published NTD Data: November 2021
Click to reload the NTD data
Introduction
Getting Started
Chapters
Fleet Replacement Module
TAM Plan
Getting Started
Enter your organization and TAM Plan information below. This information will appear at the top of your auto-generated TAM Plan. Note that

When Using TAMPLATE for TAM Plan Updates

- The TAMPLATE automatically populates using the most recently published NTD data
- FTA publishes NTD data each fall, providing data for the previous year
- Agencies using the TAMPLATE may either use the 2020 NTD data or manually update with more recent data
- May need to manually update asset inventories to include assets included in TAM plans but not reported to NTD

Chapter 1: TAM Plan Introduction

TAB NAME	DESCRIPTION	REQUIREMENT
Basic	Provide an overview of your agency and enter your performance targets.	Required for all TAM plans
TAM Goals	Enter your agency's TAM-related objectives.	Optional for all plans
TAM Policy and Evaluation	Describe your agency's TAM policy and plan for continuous improvement.	Required for Tier I only
TAM Roles and Responsibilities	Identify individuals with TAM-related responsibilities.	Required for Tier I only

Chapter 1: TAM Plan Introduction

Basic (Required) | **TAM Goals (Optional)** | **TAM Policy and Evaluation (Tier I)** | **TAM Roles and Responsibilities (Tier I)**

Please complete the sections below. The "Brief Overview" section is required and creates the introduction section of the generated TAM Plan. You also have the option to describe the methods used in setting performance targets. Then in the "Performance Targets & Measures" section, please provide your organization's performance targets for each asset class. When you are finished, click "Save" to save this page, or click "Next" to save and proceed to the next page in this chapter.

Brief Overview *

Describe your organization and summarize your TAM Plan contents and structure. Possible information could include (1) your organization type, size, and service area; (2) the context for your TAM Plan and an overview of asset management within your organization; and (3) the specific sections you are including in your final TAM Plan.

Methods for Target-Setting

Explain the methods your agency used to set performance targets (OPTIONAL).

Chapter 1: TAM Plan Introduction

FIELD	INSTRUCTIONS
Agency Name	Select the agency name from the drop-down menu.
Asset Category	Select the appropriate asset category for the new asset.
Asset Class	Select the appropriate asset class for the new asset. This drop-down menu updates based on the selected asset category. If you select “Custom (non-rule) Category” for Asset Class, enter the custom asset type in the textbox that appears.
2022 Target	Enter a performance target for the coming year.
2023 - 2026 Target	Optionally, enter targets for up to five years in the future.

Chapter 1: TAM Plan Introduction

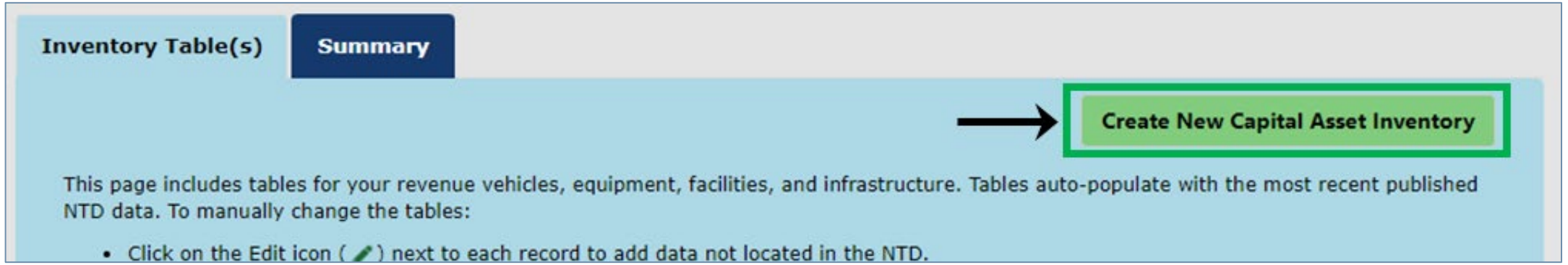
Add Performance Targets & Measures

Functions	Agency Name	Asset Category	Asset Class	2022 Target	2023 Target	2024 Target	2025 Target
	Piedmont Authority for Regional Transportation	Facilities	Administrative / Maintenance Facilities	0%			
	Piedmont Authority for Regional Transportation	Facilities	Passenger Facilities	0%			
	Piedmont Authority for Regional Transportation	Revenue Vehicles	BU - Bus	13%			
	Piedmont Authority for Regional Transportation	Revenue Vehicles	CU - Cutaway	42%			

Chapter 1: TAM Plan Introduction

Chapter 2: Asset Inventory

TAB NAME	DESCRIPTION	REQUIREMENT
Inventory Table(s)	Your asset inventory as downloaded from the NTD. You can modify assets in these tables and add additional entries.	Required for all TAM plans
Summary	A table with summary metrics by asset category and asset class. The summary table updates based on information in the Inventory Table(s) tab.	Required for all TAM plans



Chapter 2: Asset Inventory

Revenue Vehicles

Functions	Agency Name	Asset Category	Asset Class	Asset Name	Asset Owner	Manufacture Year	NTD ID	RVI ID	Manufa
	Piedmont Authority for Regional Transportation	Revenue Vehicles	BU - Bus		Owned outright by public agency (OOPA)	2008	40173	342624	Or Indus (forme Bus I
	Piedmont Authority for Regional Transportation	Revenue Vehicles	BU - Bus		Owned outright by public agency (OOPA)	2009	40173	342627	Or Indus (forme Bus I

Chapter 2: Asset Inventory

Chapter 2: Asset Inventory

Inventory Table(s) | Summary

Summary by Asset Class

The table below automatically updates with summary statistics reflecting data from the *Inventory Table(s)* tab. If needed, manually add any missing data (e.g., replacement cost/value) to the inventory tables to ensure this summary reflects complete information.

Asset Category/Class	Total Number	Avg Age	Avg Mileage	Avg Replacement Cost/Value	Total Replacement Cost/Value
Revenue Vehicles	**103**	**5.8**	**27,959**	**$0.00**	**$0.00**
BU - Bus	25	8.6	50,920	$0.00	$0.00
CU - Cutaway Bus	18	4.8	23,208	$0.00	$0.00
MV - Mini-van	23	5.5	17,039	$0.00	$0.00
VN - Van	37	4.6	21,545	$0.00	$0.00

Chapter 3: Condition Assessment

TAB NAME	DESCRIPTION	REQUIREMENT
Condition Table(s)	Your asset inventory as specified in Chapter 2 and supplemented with condition information from NTD.	Required for all TAM plans
Summary	A table with summary metrics by asset category and asset class. The summary table updates based on information in the Condition Table(s) tab.	Required for all TAM plans

Chapter 3: Condition Assessment

Facilities

Please click on the edit ( ) icon to update the TERM scale condition for the asset. If a facility's condition has not been assessed, set the TERM scale condition to "N/A" and set the assessment date to the date facility was built. TERM Scale Condition: 1-Poor,2-Marginal, 3-Adequate, 4-Good, 5-Excellent.

Functions	Agency Name	Asset Category	Asset Class	Asset Name	NTD ID	ID/Serial No	Count	Unit Replacer Cost/Val
	Piedmont Authority for Regional Transportation	Facilities	Administration	PART Admin	40173	5471		
	Piedmont Authority for Regional Transportation	Facilities	Maintenance	PART Operations/Maintenance Facility	40173	8472		

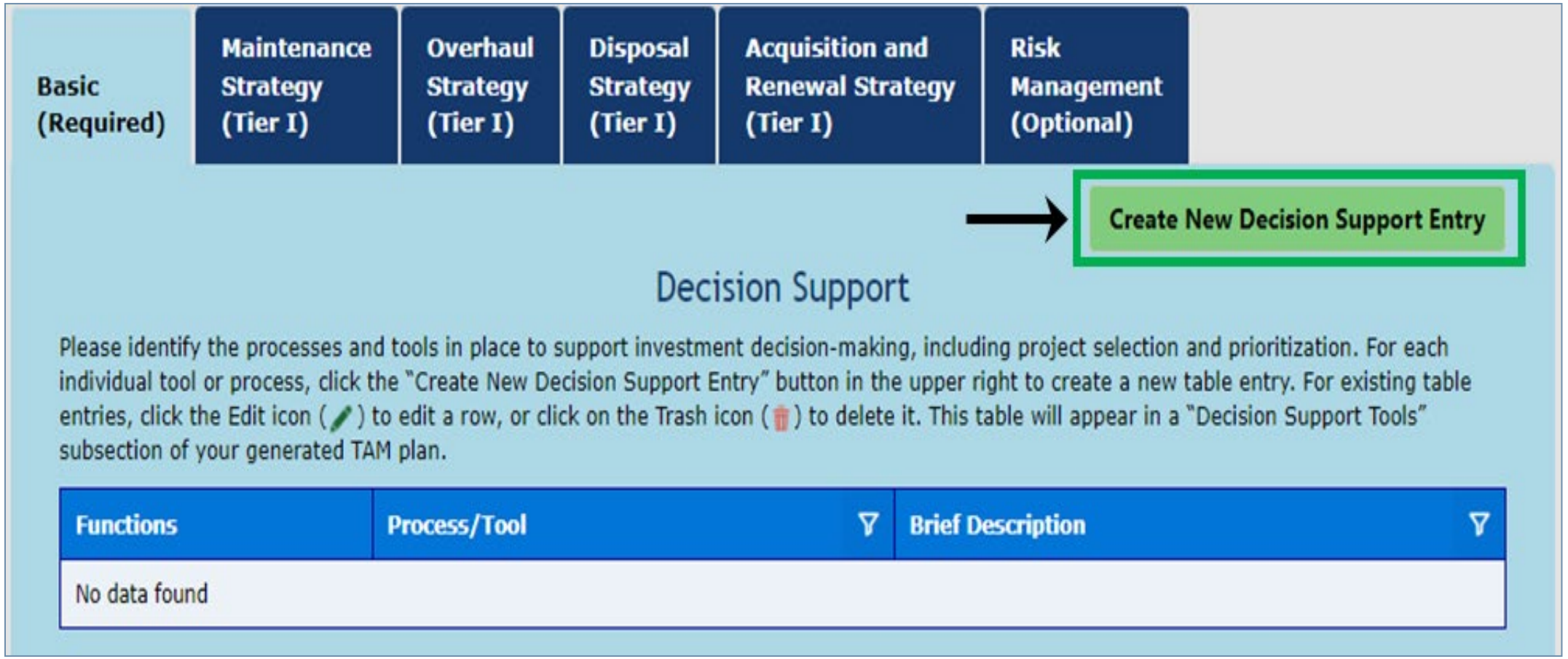
Chapter 3: Condition Assessment

Summary							
Asset Category/Class	**Total Number**	**Avg Age**	**Avg Mileage**	**Avg Replacement Cost/Value**	**Total Replacement Cost/Value**	**% At or Exceeds ULB**	**% of Track Miles in Slow Zone**
Revenue Vehicles	**103**	**5.8**	**27,959**	**$0.00**	**$0.00**	**30%**	**N/A**
BU - Bus	25	8.6	50,920	$0.00	$0.00	52%	N/A
CU - Cutaway Bus	18	4.8	23,208	$0.00	$0.00	33%	N/A
MV - Mini-van	23	5.5	17,039	$0.00	$0.00	48%	N/A
VN - Van	37	4.6	21,545	$0.00	$0.00	3%	N/A

Chapter 4: Decision Support

TAB NAME	DESCRIPTION	REQUIREMENT
Basic	Describe the methods your agency uses to make asset management decisions.	Required for all TAM plans
Maintenance, Overhaul, Disposal, Acquisition and Renewal	On these FOUR separate tabs, describe your agency's strategies for each of these four asset management activities.	Required for Tier I only
Risk Management	Identify your agency's risks and mitigation strategies.	Optional for all plans

Chapter 4: Decision Support



Chapter 5: Investment Prioritization

TAB NAME	DESCRIPTION	REQUIREMENT
Proposed Investments	Describe the investments needed for your agency to achieve/maintain a state of good repair.	Required for all TAM plans
Capital Investment Activity Schedules	Attach any plans or schedules for capital investment activities.	Required for Tier I only

Chapter 5: Investment Prioritization

Proposed Investments (Required) | **Capital Investment Activity Schedules (Tier I)**

Proposed Investments

Please provide an overview of the investments needed for your organization to maintain or achieve a State of Good Repair (SGR). Then in the table below, provide a list of the selected projects and programs prioritized based on your organization's criteria. Rank the projects and order them by year of planned implementation. Your prioritization overview and investment table will appear in a "Proposed Investment" subsection of your compiled TAM plan.

When you are finished, click "Save" to save any changes in the textbox, or click "Next" to save and proceed to the next page in this chapter.

Proposed Investments: Provide a list of the selected projects and programs prioritized based on your agency's criteria. Rank the projects and order them by year of planned implementation.

Investment Prioritization

What investments are needed to maintain or achieve a State of Good Repair (SGR) over the horizon period?

Create New Proposed Investments

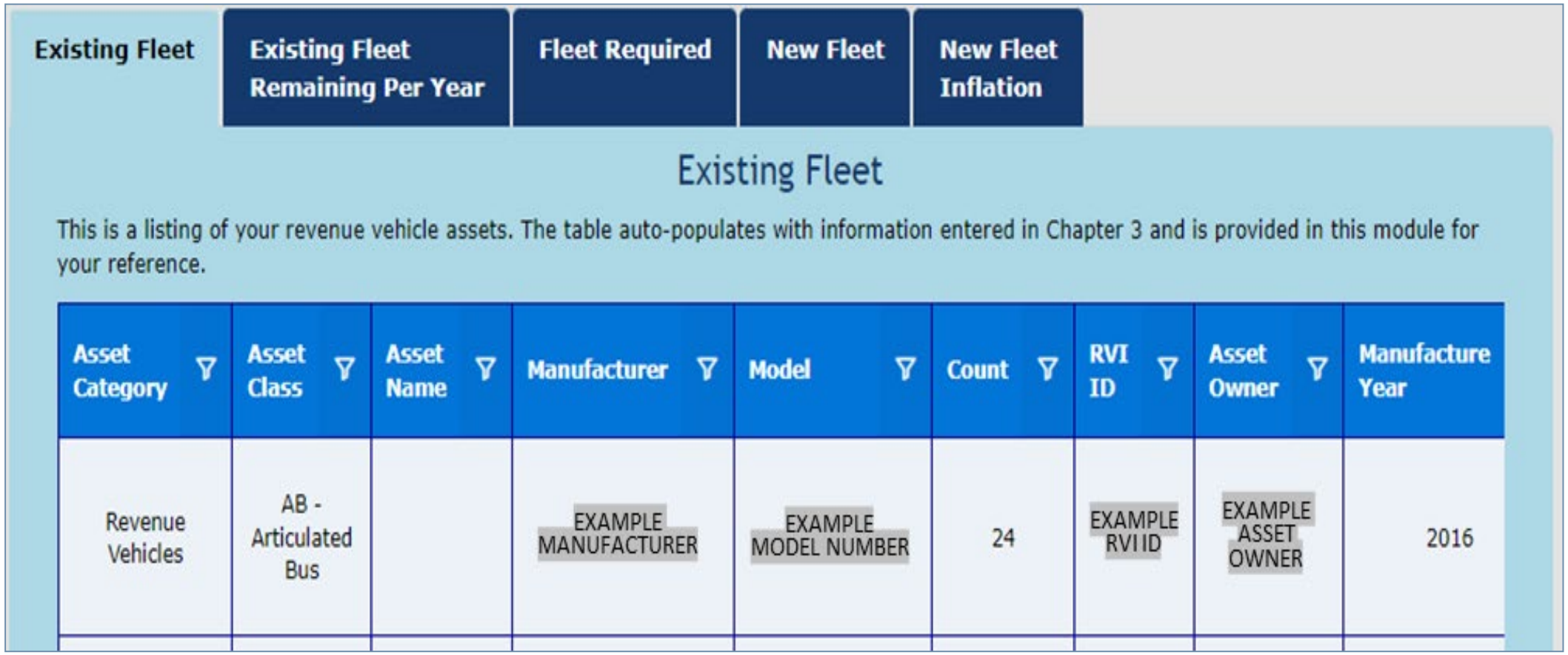
To create a new table entry, click the "Create New Proposed Investments" button above the table. For existing table entries, click the Edit icon ( ) to edit a row, or click on the Trash icon ( ) to delete it.

Functions	Project Name	Project Year	Asset Category	Asset Class	Cost	Priority	Updated Date
No data found							

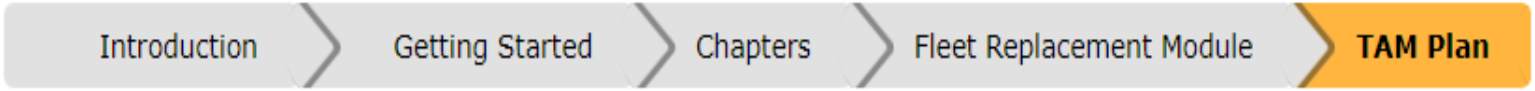
Chapter 5: Investment Prioritization

FIELD	INSTRUCTIONS
Project Name	Enter a project name.
Project Year	Enter the year of proposed implementation.
Asset Category	Select the asset category targeted by this project.
Asset Class	Select the asset class targeted by this project. This drop-down menu updates based on the selected asset category. If you select “Custom (non-rule) Category” for Asset Class, enter the custom asset type in the textbox that appears.
Cost	Enter the expected project cost.
Priority	Use the drop-down menu to assign a priority (high, medium, low, or other” to the project. If you select “Other”, enter a custom priority label in the textbox that appears.

Fleet Replacement Module



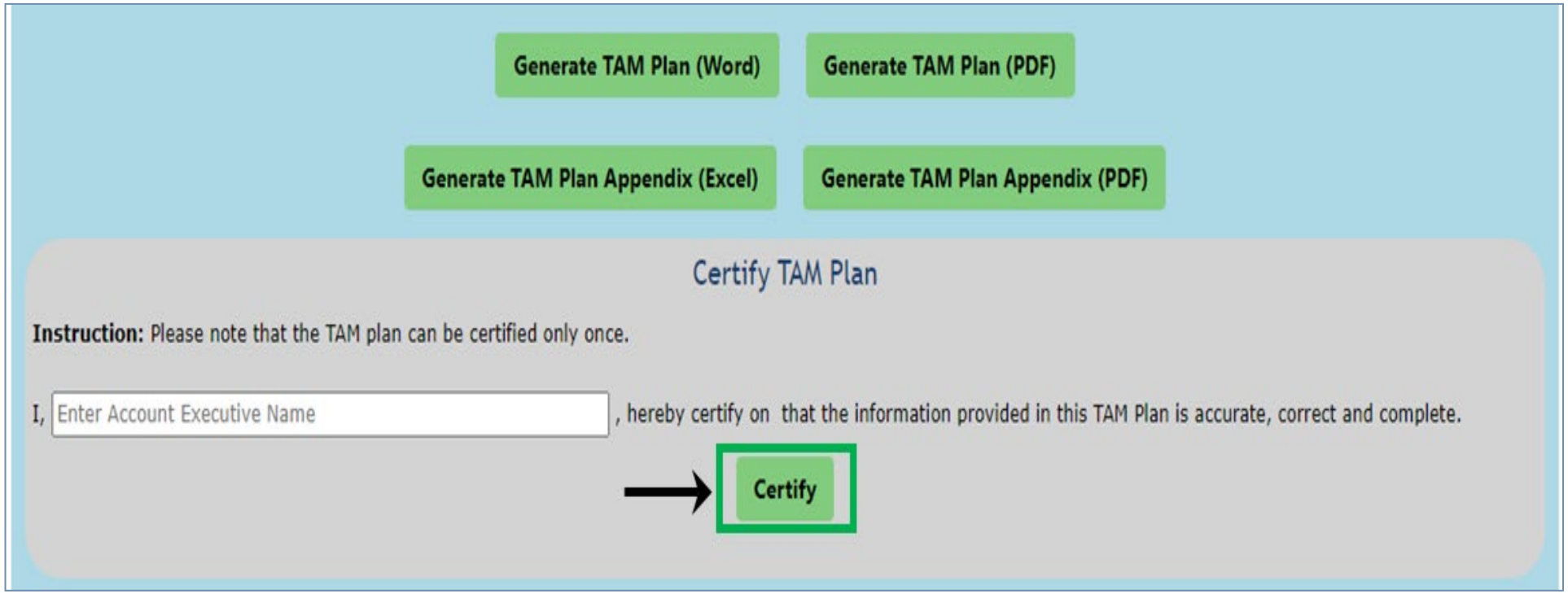
Completing Your TAM Plan



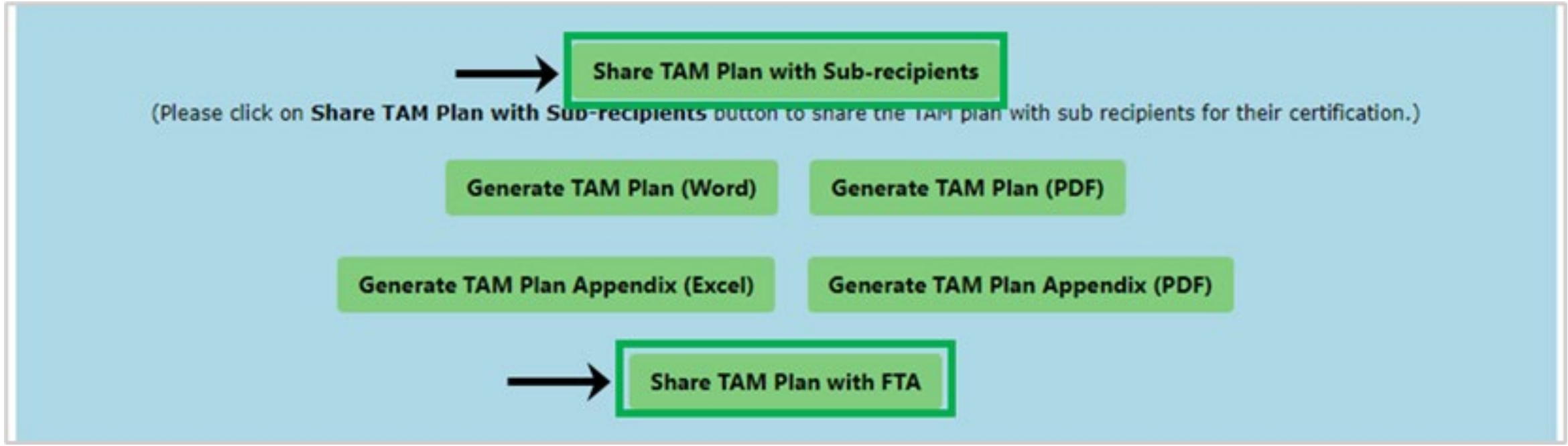
After completing the other TAMPLATE sections, click the “TAM Plan” link at the top of the page to compile and load your TAM plan.

On this final page of TAMPLATE, you can certify, view, download, and share your TAM plan. Note that TAMPLATE does NOT automatically submit your plan to FTA.

Certification



Sharing


Share TAM Plan with Sub-recipients
(Please click on Share TAM Plan with Sub-recipients button to share the TAM plan with sub recipients for their certification.)
Generate TAM Plan (Word)
Generate TAM Plan (PDF)
Generate TAM Plan Appendix (Excel)
Generate TAM Plan Appendix (PDF)
Share TAM Plan with FTA

Downloading

On this page, you can generate and download your TAM Plan and appendices in multiple formats. **Note: This tool does NOT automatically submit your plan to FTA.** When you are finished editing your plan, please enter your first and last name to certify the document below. Your statement of certification will be included at the bottom of both the generated TAM Plan and appendices. After certifying the TAM Plan, click on **Share TAM Plan with FTA** button share your TAM Plan with FTA.

Generate TAM Plan (Word) **Generate TAM Plan (PDF)**

Generate TAM Plan Appendix (Excel) **Generate TAM Plan Appendix (PDF)**

Thank You

Kirby Ledvina: General Engineer, U.S. DOT Volpe National Transportation Systems Center

User Manual Reviewers:

- Chris Broach, TNDOT
- Paul Clark, Lee County Transit
- Jeff Davidson, Kitsap Transit
- Ashley Hopton, United Keetoowah Band of Cherokee Indians in Oklahoma
- Carl Montgomery, City of Phoenix

Poll 2

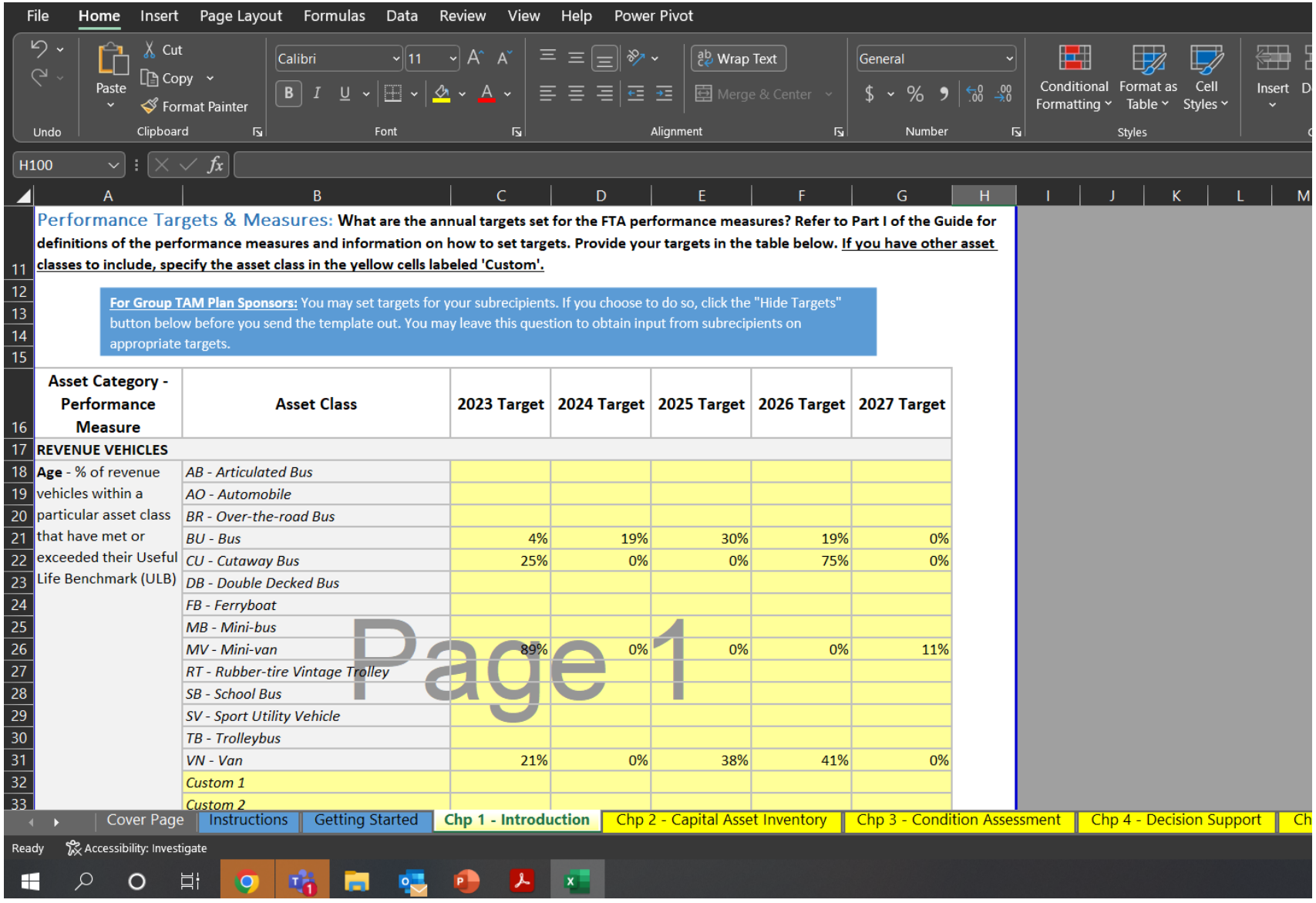
Piedmont Authority for Regional Transportation, TAM & TAMPLATE

Kyle Laird Mobility and Systems Planner

PART TAM Background

- Part is a small Tier II agency
  - 23 buses at peak
    - mix of LTVs and HD 40’
    - 25% spare ratio
  - Regional vanpool fleet
  - 1 Maintenance facility
  - 1 Bus Hub facility
  - 1 Admin facility
  - 16 owned Park & Ride lots
  - Equipment like in-ground lift, generators, bus wash…

PART's first TAM Plan



Performance Targets & Measures: **What are the annual targets set for the FTA performance measures? Refer to Part I of the Guide for definitions of the performance measures and information on how to set targets. Provide your targets in the table below. If you have other asset classes to include, specify the asset class in the yellow cells labeled 'Custom'.**

For Group TAM Plan Sponsors: You may set targets for your subrecipients. If you choose to do so, click the "Hide Targets" button below before you send the template out. You may leave this question to obtain input from subrecipients on appropriate targets.

Asset Category - Performance Measure	Asset Class	2023 Target	2024 Target	2025 Target	2026 Target	2027 Target
REVENUE VEHICLES						
Age - % of revenue vehicles within a particular asset class that have met or exceeded their Useful Life Benchmark (ULB)	*AB - Articulated Bus*					
	AO - Automobile					
	BR - Over-the-road Bus					
	BU - Bus	4%	19%	30%	19%	0%
	CU - Cutaway Bus	25%	0%	0%	75%	0%
	DB - Double Decked Bus					
	FB - Ferryboat					
	MB - Mini-bus					
	MV - Mini-van	89%	0%	0%	0%	11%
	RT - Rubber-tire Vintage Trolley					
	SB - School Bus					
	SV - Sport Utility Vehicle					
	TB - Trolleybus					
	VN - Van	21%	0%	38%	41%	0%
	Custom 1					
	Custom 2					

Page 1

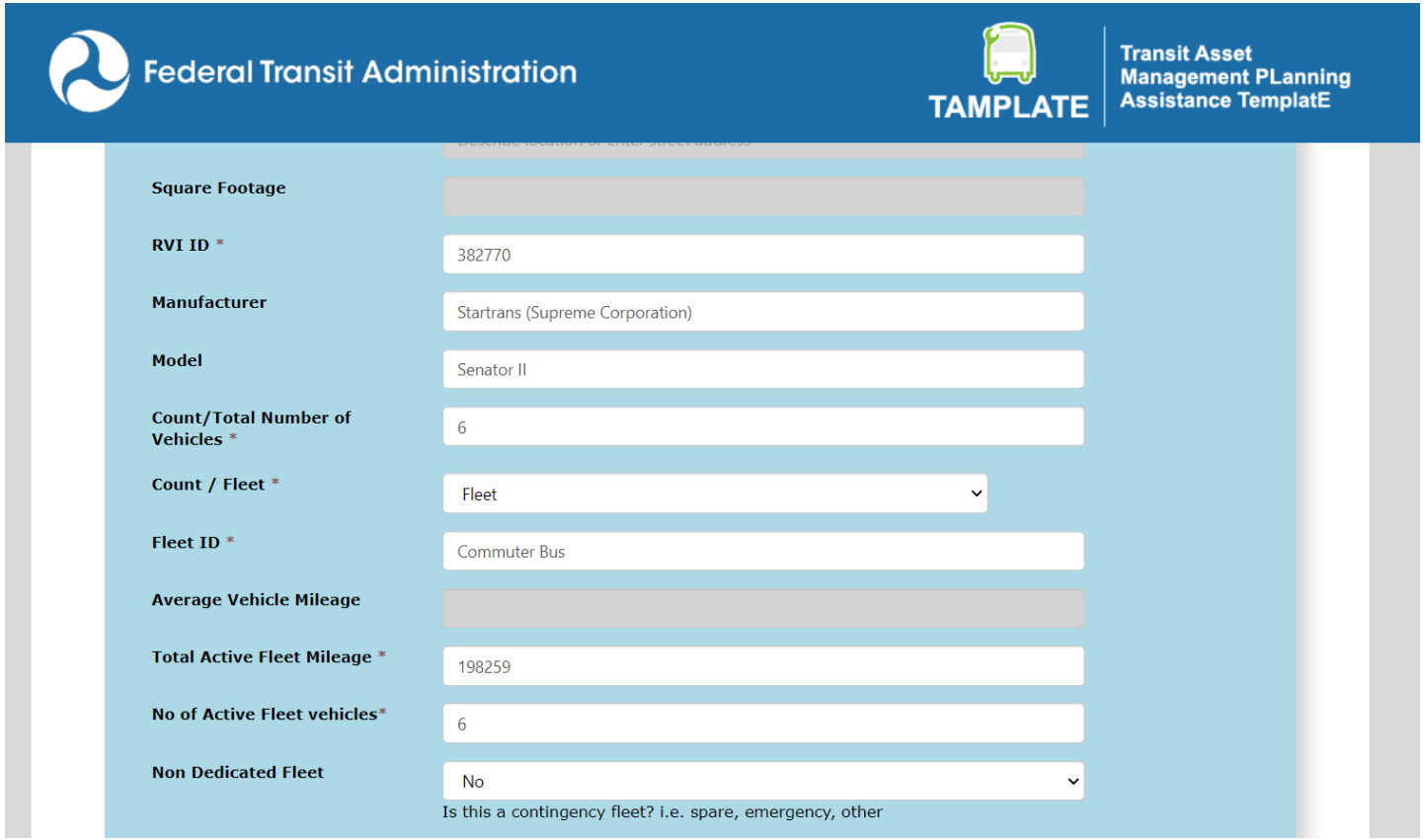
And then came TAMPLATE online!

TAMPLATE links directly to NTD to import your inventory of assets

The interface and organization is more user friendly

It’s not perfect but keeps getting better!

- As more agencies use TAMPLATE
  - More input will make it to the developers
  - Improvements will be made
    - (Count/Total # Vehicles e.g.)
  - Scrolling through inventory is frustrating



PART's TAM and State of Good Repair (SGR) Policy

- PART is committed to implementing a strategic process for acquiring, operating, maintaining, upgrading, and replacing its transit assets to directly support the agency's mission to enhance the quality of transportation for Piedmont Triad citizens through efficient use and protection of our natural, economic and human resources.
- Our policy is to promote a culture that supports asset management at all levels of the organization, to employ effective asset management business practices and tools, to ensure optimal asset performance and useful life, and to use timely, quality data to support transparent and cost-effective decision-making for resource allocation and asset preservation.
- We shall emphasize people.
- Through coaching, training, the application of state-of-the-art technology, and improved processes, we shall ensure our workforce's ability to identify and meet PART's asset management needs, incorporate sustainability and accessibility into our business practices, and to deliver to our customers the best service and value for every fare and tax dollar spent.

Benefits of TAM for PART

Matching up TAM analysis of our position/condition with the following replacement schedules

- Capital Planning
  - Capital Reserve Fund Budget
  - Capital Reserve Schedule
- Depreciation
  - Schedule

Challenges in PART's View

- Coordination with the MPOs and State DOT
  - Timelines are different
  - Still more education needed
- Yearly updates to TAM targets

Q&A

TRANSIT.DOT.GOV