

Tamalynn Kennedy: Good afternoon and welcome to the webinar "Using TAMPLATE to Create a TAM Plan," presented by the Federal Transit Administration. My name is Tamalynn Kennedy, the TAM Program Manager. Next slide please.

Tamalynn Kennedy: Today's presentation is available now on the TAM website and you can access the linked resources from the PDF. A recording of the webinar will also be posted as soon as it becomes available. Closed captioning is available by clicking live transcript then selecting show subtitle. There will also be a question and answer session after the presentations so please type any questions you have into the Q&A box available at the bottom of your screen. Next slide.

Tamalynn Kennedy: I want to start today's presentation with a brief update on the TAM program. As I hope you are aware, the first required TAM PLAN Update is due October 1st, 2022. Secondly, registration is now open for the 2022 Round Table. It will be a virtual event similar to last year's round table and will take place on Tuesday, July 19th. We will include a link to the registration for the round table in the chat. Next slide.

Tamalynn Kennedy: Today's webinar includes a tutorial and a user review of the TAM Planning Asset Template better known as TAMPLATE. The tutorial will highlight recent updates and enhancements, what things you should know for using TAMPLATE for the 2022 TAM PLAN update, and also future updates and enhancements. Kyle Laird, Mobility Assistance Planner for Piedmont Authority for Regional Transportation in North Carolina will share his perspective as a user of TAMPLATE. And then finally, we will have a question and answer session. Next slide please.

Tamalynn Kennedy: Okay. This is the tutorial section. It will be the largest section of today's presentation. Next slide.

Tamalynn Kennedy: We have a brief poll here that we want to ask participants to fill out. It's just to establish a baseline of the webinar attendees familiarity with TAMPLATE, so we'll give you a few moments here to fill out the poll.

Tamalynn Kennedy: You start to see some of the responses coming in. Are we ready to close the poll? Let's see the results.

Coordinator: They appear to share in my end, Tamalynn, so I apologize if they're not viewable.

Tamalynn Kennedy: Okay. I'm not sure what others are seeing, but I can say that we have sort of a mix here. 31 percent hearing about it for the first time now. 44 percent aware but haven't used it much. So great. I hope a lot of people will have some good takeaways from this presentation. Next slide please.

Tamalynn Kennedy: TAMPLATE is a technical assistance resource to help transit providers develop TAM PLANS in alignment with the final rule. The application gives you the ability to download your most

recently published agency data form NTD. The TAMPLATE application is designed for any user but is likely to be most helpful for tier 2 transit providers developing their own individual TAM PLANS or group Plan TAM sponsors developing Plans for some recent <inaudible 00:04:36>. Tier 1 transit providers may also use TAMPLATE but because of its simplified structure this TAMPLATE may be less useful for agencies with customized asset management systems. Next slide please.

Tamalynn Kennedy: The application is accessible from the TAM website. Use the link in the sidebar to navigate to the page. I want to mention for today's tutorial we have opted to use screen shots rather than a live demo to reduce any potential technical difficulties. Next slide.

Tamalynn Kennedy: If you are using TAMPLATE for the first time, you will need to create a user account. All FTA applications must be accessed to the FTA application portal with your login.gov credentials. The single user account does limit collaboration on a TAM PLAN that is in progress as each TAM PLAN may only be edited from the creators' user accounts. Next slide.

Tamalynn Kennedy: Next you will need to register the TAMPLATE application within the FTA application portal. For any assistance with the FTA application portal please see the help topics on the application help page. Next slide.

Tamalynn Kennedy: Once you have successfully logged in to the FTA application portal and clicked the TAMPLATE icon to open the TAMPLATE dashboard, the dashboard is where you can view any previously saved TAM PLANS. If you have not previously saved a TAM PLAN, the table will be empty. At the top of the TAMPLATE dashboard click create new TAM PLAN to start a new Plan for a tier 1, tier 2 or group Plan sponsor. To create an experimental TAM PLAN click the Create new experimental TAM PLAN button. This is intended for non-traditional users, for example researchers, who may want the flexibility to combine entity data from agencies across the U.S. Additionally, experimental TAM PLANS have fewer required fields than regular TAM PLANS and TAMPLATE. I want to acknowledge that some of the instructions and notes within the application still need to be revised after the most recent update. However, the TAMPLATE user manual is a companion document that walks you through each section of TAMPLATE to generate a TAM PLAN. The user manual is accessible both within the application and on the TAMPLATE home page. Next slide.

Tamalynn Kennedy: The dashboard includes a table with your saved TAM PLANS. In the functions column of the table you can clone, view, edit or delete existing TAM PLANS. I want to highlight two of those functions. Cloning. Cloning a Plan creates a duplicate copy of a Plan. This function is available for current Plans in which you have modified the downloaded NTD data as well as older Plans that you created before October 1st of the current Fiscal Year. Editing a Plan will open the Plan in TAMPLATE so that you continue to modify the Plan. This option is only available for Plans created or cloned on or after October 1st in the current Fiscal Year. The October 1st cutoff date is related to the annual publication date of NTD data, so while it may seem like an arbitrary date, the application is configured in this manner to ensure that only the most recent NTD data is important. Next slide.

Tamalynn Kennedy: After you click one of the buttons to create a new Plan, the TAMPLATE opens the introduction page which provides an overview of TAMPLATE and its capabilities. To connect to agency data and begin editing your new TAM PLAN, click the getting started button that is at the bottom of the page. Next slide.

Tamalynn Kennedy: The fields listed on this slide are required to set up and configure your TAM PLAN. Please note your agency name will appear as it was reported in the NTD report year. Currently, the NTD report year 2020 data is available in TAMPLATE. If your agency name has changed since your 2020 data report, you can manually edit the final report to reflect any necessary changes. Next slide.

Tamalynn Kennedy: The include sponsor NTD inventory data field will only appear when group Plan sponsor is selected for TAM PLAN type. For group Plan sponsors the sub-recipient dropdown menu autopopulates with the sponsor's previous sub-recipients. To add a new sub-recipient, select other from the dropdown menu and enter the sub-recipient agency's name. Please note, if you use the other option you will need to manually enter that agency's asset data in TAMPLATE chapters 2 and 3. Next slide.

Tamalynn Kennedy: Your selected agency type determines what sections of the TAMPLATE are required. This is just a section showing you which tabs and elements are required based on your tier. Next slide.

Tamalynn Kennedy: TAMPLATE will automatically download NTD data for the agency selected on the tool's getting started page. However, at any point you can also manually refresh and reset the downloaded NTD data by clicking the click to reload NTD button. You will also notice above the button it tells you the date of the NTD data publication. This data, the current data was published in November 2021 and reflects Fiscal Year 2020 data. Reloading the NTD data will erase all manual changes you have made to the performance targets in the getting started section and to the inventory tables in the chapter section. Next slide.

Tamalynn Kennedy: As I mentioned, 2020 NTD data is currently available in TAMPLATE. Report year 2021 NTD data will be available in Fall 2022 after the October 1st reporting deadline. This means that agencies using the TAMPLATE for their TAM PLAN updates may use 2020 NTD data or can manually update the application with more recent data. Agencies must also include assets that are required for TAM PLANS that are not reported to NTD such as equipment over \$50,000 dollars at acquisition value, that they have direct capital responsibility for and non-rail fixed guideway infrastructure assets. If you previously created a TAM PLAN in TAMPLATE that included assets and asset data not reported to the NTD, it may be more efficient to clone that previous Plan but this, of course, depends on the characteristics of your agency and assets. Next slide.

Tamalynn Kennedy: Information entered in chapter 1 makes up the introduction section of your TAM PLAN. This slide is an overview of the tabs in chapter 1. Next slide.

Tamalynn Kennedy: You can see that each tab includes instructions and there is descriptive text in each of the fields as well. Each chapter and tab is also fully explained in the TAMPLATE user manual. In the interest of time I will not go into detail about every tab and field but encourage you to review the TAMPLATE user guide as you move through the application. Next slide.

Tamalynn Kennedy: A basic tab includes the performance targets and measures section. If you scroll down you can view and edit your agency's performance targets by asset class. Next slide please.

Tamalynn Kennedy: For existing assets in the NTD, you can click the edit icon next to the appropriate entry to add or revise a target or the trash icon to delete a target. For any asset classes not previously reported to NTD, you will need to create a new table entry. Performance measures for all asset categories are the percentage of assets not in a state of good repair. You can see FTA's performance management web page for additional information on calculating performance measures and setting targets. Please note that the columns here are mislabeled and will be updated in a future release. 2021 targets are being populated under the column 2022. Again, you can manually edit the label in your downloaded file if you choose to do so. Next slide.

Tamalynn Kennedy: In the remaining tabs in chapter 1, follow the instructions and field descriptions as applicable to your agency. Tier 1 sections may be completed by tier 2 agencies that wish to expand their TAM PLAN beyond the requirements. Next slide.

Tamalynn Kennedy: Chapter 2 presents the asset data for your agency or agencies. To add assets that do not appear in your NTD data, select the create new capital asset inventory button. Add all required information in the add new asset capital asset inventory page that appears. Next slide.

Tamalynn Kennedy: The inventory table includes your asset inventory as downloaded from the entity and any manual additions you have added. Assets are organized in separate tables by category. Revenue vehicles, equipment, facilities and infrastructure. Each row in the revenue vehicles table represents an individual fleet type and may contain multiple vehicles. The same is true for the equipment field. To modify an existing asset, click the edit icon in the assets row, make any changes within the update capital asset inventory page that appears or if you wish to delete an asset from the table, click the trash icon. Next slide.

Tamalynn Kennedy: A few notes on the update capital asset inventory form. Some of the data fields may not pull from NTD but are still required form fields as indicated with the asterisk. In the example above TAMPLATE displays an error message when the current asset record does not have a value for asset name which is a required form field. You will need to manually enter all required information or to save any changes. If you do not have all information on hand, you can enter a space or any number or text as a placeholder. Also some fields will be grayed out depending on other field values. Again, we are currently reviewing the required versus optional designations to optimize usability of TAMPLATE. If you have any comments or suggestions on the usability or functionality of TAMPLATE you're welcome to email the TAM Program. We can drop the email address here in the chat for reference. Next slide please.

Tamalynn Kennedy: The summary table presents summary statistics by asset category then asset class as applicable. You review your summarized asset data and make any changes to the inventory table to ensure the summary accurately reflects your agency's asset inventory. You cannot-- you are not able to directly edit the summary table within TAMPLATE. In the next update we also intend to further align the NTD data fields with the TAMPLATE fields. This alignment will assist users in identifying how the NTD data is being populated into TAMPLATE. Next slide.

Tamalynn Kennedy: Chapter 3 reports the asset's condition. Next slide.

Tamalynn Kennedy: The performance measure for revenue vehicles and equipment depends on the asset age and useful life benchmark. In the revenue vehicle and equipment tables in chapter 3, the useful life benchmark column presents the ULB as previously reported to NTD. For any new assets that you created in chapter 2, the ULB column autopopulates with the FTA default value for that asset class. However, you can manually edit an asset's ULB by clicking the edit icon in a row. For facilities, the performance measure depends on the term scale condition of each asset. See performance measure for infrastructure depends on the miles of track under performance restrictions. In the infrastructure table in chapter 3, the track under performance restriction column presents this number in miles as previously reported to NTD. To change this value you will need to edit the asset's entry in chapter 2. Next slide.

Tamalynn Kennedy: The chapter 3 summary table reports summary metrics by asset category and asset class. Again, you are not able to directly edit the summary table. I will note that the infrastructure category requires field and formula updates in order to properly calculate summary metrics. Currently, TAM PLAN TAMPLATE does not identify the mode and type of service for infrastructure which is necessary in order to properly account for assets related to a specific service. The fields and formulas will be updated in a future release. Next slide.

Tamalynn Kennedy: Information entered in chapter 4 makes up the decision support section of your TAM PLAN. Next slide.

Tamalynn Kennedy: The table on the basic tab lists the processes and tools your agency uses to support investment decision making. For each process or tool your agency uses, click the create new decision support entry button. On the add new decision support page that appears, name and briefly describe the process or tool. The remaining tabs in chapter 4 follow the same format and in the interest of time I will not review each tab individually. Next slide.

Tamalynn Kennedy: Information entered in chapter 5 makes up the investment prioritization section of your TAM PLAN. Any attached Plans and schedules will be included in the appendix of your TAM PLAN. Next slide.

Tamalynn Kennedy: The following steps are required for all TAM PLANs. In the investment prioritization text box provide an overview of the investments needed for your agency to maintain or achieve a state of



good repair. List out your agency's proposed investments for each investment under consideration. Click the create new proposed investment button to do so. Next slide.

Tamalynn Kennedy: On the add new proposed investment page that appears, you will fill out the fields and click the add button. The fields listed on this slide are the fields for this section. Next slide.

Tamalynn Kennedy: The fleet replacement module is designed to help you quantify your agency's future fleet needs. This module is optional for all users. Tables from the new fleet and new fleet inflation tabs will make up an appendix in your TAM PLAN. This module is also being considered for future enhancements so the module can better serve agencies as a decision support tool. Next slide.

Tamalynn Kennedy: After completing the other TAMPLATE sections you will 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. Please note that TAMPLATE does not automatically submit your Plan to FTA. Next slide.

Tamalynn Kennedy: You will need to certify the information provided in the TAM PLAN is accurate, correct and complete. Certifying the Plan is not the same as obtaining accountable executive approval. You will need to separately obtain the accountable executive's signature after downloading your TAM PLAN. To certify your TAM PLAN, scroll to the gray certification box. The accountable executive's name will autopopulate in this field. However, you may edit the field as needed before clicking the certify button. You can still edit the Plan after certifying but you cannot remove your certification or recertify with a different name. Cloning a certified TAM PLAN within the TAMPLATE dashboard will remove the certification statement. That means if the name in the certification is incorrect, you can clone the Plan and have it recertified. Next slide please.

Tamalynn Kennedy: Group Plan sponsors have the option to share their TAM PLAN with sub-recipients for their certification. Sub-recipients will be emailed a link that takes them to a page in TAMPLATE in which they can view the Plan and add their names to certify the Plan on behalf of the respective agencies. Sub-recipients are not able to directly edit the Plan. A table of sub-recipient certification is automatically added to your TAM PLAN. Group Plan sponsors can share their group Plan directly with the sub-recipient's accountable executive to receive both certification and signature. Future updates will expand this functionality to tier 1 and individual tier 2 Plans but until that functionality is enabled tier 1 and individual tier 2 Plans must still download their Plan and submit the Plan for signature with their accountable executive. After certifying your Plan a button will appear with the option to share the completed TAM PLAN with FTA. Sharing your TAM PLAN with FTA is optional and your shared Plan will only be utilized for research purposes and to further future development of the TAM program. Your Plan is only reviewed for compliance during your triennial and/or state management review. Next slide.

Tamalynn Kennedy: You may also download your Plan by clicking the green generated buttons at the top of the page. After generating and downloading award document or PDF, it is possible to manually edit

the document as needed. For example, if you need to change a column heading or update the agency name. PDF versions can be edited with Adobe Acrobat. Next slide.

Tamalynn Kennedy: I would like to say thank you to Kirby Lavina, [ph?] the General Engineer at the U.S. Department of Transportation Volpe Center for her work on the user manual as well as the user manual reviewers listed below. Next slide.

Tamalynn Kennedy: We have a second poll here. Just that concludes the tutorial and after all the information you've received, we'd just like to get your feedback about the likelihood of using TAMPLATE. So I'll give you a few moments. Okay. So I'm seeing the responses, I hope you are too, that we have somewhat likely or very likely. Again, as you may or may not know, using TAMPLATE is completely optional. You do not need to use the TAMPLATE to complete your TAM PLAN. But it is a tool developed, a resource developed by FTA just to assist agencies in compliance. And we'll close the poll. And I would now like to turn the webinar over to Kyle for a user's perspective on using TAMPLATE. After the presentation there will be a question and answer opportunity. Again, if you would like to ask a question please type your question into the Q&A box available at the bottom of the screen. Kyle.

Kyle Laird: Thank you, Tamalynn. All right, folks, like Tamalynn said earlier, my name is Kyle Laird. I'm the Mobility and Systems Planner at Piedmont Authority for Regional Transportation in Greensboro, North Carolina. Next slide.

Kyle Laird: So a little bit about the Piedmont Authority for Regional Transportation, PART. We are a small tier 2 agency where the regional bus transit system that connects 5 fixed route systems across the region and there's a sixth fixed route connection on the way probably in a year they might get their fixed route up and running. So, we are in a region of about 1.6 million people. It's a little smaller than the state of Connecticut. We have 23 buses we run at peak, a mix of LTDs and heavy duty 40-footers and we keep a 25% spare ratio. We also house the regional van program and we have quite a big fleet there with minibus, minivans and 15-passenger larger vans. We have one maintenance facility, one bus hub facility, and one administrative facility, also have 16 owned park and ride lots. The other park and ride lots are kept up with agreements with retailers and then we do have equipment that are quite large and expensive, the in-ground lift, generators, the bus wash, things like that that we think of kind of as being part of a facility, but they will wear out earlier than the facility does. So, they are managed a little differently in our TAM Plan. Next slide. So, does anybody remember this? I know you can't answer me out loud, but this is a picture of one of the pictures of Parks first TAM Plan. It was a little clunky. It has all the same tabs and information that the TAMPLATE has. Actually, the TAMPLATE is a little bit more robust and has a little more. But this is what FTA supplied a few years back for us to use and I was grateful that they did because it is a masterpiece of spreadsheet wizardry. They had some really great work done there, especially with the fleet replacement module. It was absolutely fascinating and we did complete it with-- where I don't remember the guidance, necessarily, of exactly what was supposed to be tier one versus tier two or optional for everybody. So, some of the things that I completed back then were the optional things that a tier two did not have to complete, but we did them anyway and I'll talk a little bit more later about this, but I think some of those things are a good idea for even those agencies that are



not required to plug those into your TAM Plan. Next slide. So, then came TAMPLATE and it was a godsend. It is so much easier to use than the big spreadsheet as far as being able to jump around between the different chapters and the different tabs within the different chapters that Tamalynn took you through just a little while ago. It really is very user friendly and the organization kind of-- it's not that the old spreadsheet didn't make sense. It's just a bit clunky and this is much easier to use. Also, the fact that you can download your NTD information directly or import it directly is-- it helps you out a whole lot. You'll still have to go into those pages, as Tamalynn showed you. Some things may not actually be completed that are required information when they import from NTD. So, you have to go in there and add those bits and pieces as well as update-- sometimes NTD's update of the information may not be quite as up-to-date as the date you use as your drop dead date for updating your inventory and whatnot. So, next slide, please. So, here, this is-- I believe Tamalynn showed you a bit of this page as well. This is where you can edit those asset groups. So, you've got three LGBs of this year and of this make and model. So, those three are grouped together by their particular RVI code or ID from NTD, which is-- RVI ID's, I had never even heard of those before I started using TAMPLATE. On the old version of the spreadsheet, you didn't have to put RVI codes in there. So, this is helpful in a way of being able to group those asset groups in the same way that NTD wants them to be grouped. So, the title of this slide, of course, is not a perfect-- TAMPLATE is not perfect, but it is getting better and I believe that with more people that are using it, more agencies that are using it, more of those agencies will find little pieces that may be improved and the input will go to the developers from each of those agency's representatives and the improvements will be made. An example I'll give you is the cloning that Tamalynn told us about just a little bit ago. One of the things that frustrated me with the TAMPLATE was that October 1st, they locked you out of editing and if you wanted to do something else or just keep using that same TAM Plan to do an update later, you had to really just start over, but now, you can clone what you have from a past TAMPLATE Plan, which is-- that was assuredly coming from people's-- their advice or their feedback to FTA. One of the things that I will say that is a not perfect thing in my mind, but it's just a pet peeve, I suppose, is this system kicks you out very quickly. If you get distracted for a few minutes by somebody at your door, by the time you look back, you're going to be kicked out. That's one of my little pet peeves, but it is a security measure. So, you just kind of have to get used to it. Another thing that hopefully will be addressed and I have heard that it is is when you finish each of the pages that you have for this particular Federal Transit Administration asset group page that you see on the slide right now and you go to the whole list of your inventory, it's hard to scroll around that list and do your little check over that makes sure everything looks right because the headers and the first column do not stay frozen and when you scroll, they go away and you may forget what you're looking at, which actual asset group that you're looking at as you move across from left to right or which particular attribute you're going down the line. But that is in the process of being taken care of and worked on to make it more easy to use there. Another little thing that came up last year when I was updating-- we update our TAM Plan every year with basically the inventory piece of it because every year, something doesn't quite go as Planned. So, we want to reupdate and re-run the fleet replacement module to make sure our targets are correct for the coming years and so, anyway, last year, it was September 16th and NTD had still not given us an RVI ID for a particular asset group that came online for us right at the end of the fiscal year and we based our updates on what we have in our inventory on July 1st of every new fiscal year for us. So, we did get NTD to give us an RVI ID for that particular asset class that came online for us in-- I guess it was the beginning of June, if I remember



correctly-- and that took care of everything and I didn't have to worry about that looming October 1st because it worked, but I got it in the back of my head, I thought we're not going to get this RVI code. It's going to lock me out. I'm going to have to redo it again, but thankfully everything worked out well in the end. Next slide. So, as I mentioned, some of the things in that original TAMPLATE I was, I'm sure, about being optional or not or required or not for a tier two, like we are, and this is one of those, TAM and state of good repair policy that we do have, but it was not required for a tier two agency to have this. I personally think this and other things like TAM vision and TAM goals, roles and responsibilities, that these things are helpful for any agency and you need to go through them and figure out for your tier two agency or even for your tier one if you're using it, some of those other optional things that are optional for both and figure out if you want to do them and it will be helpful for your organization. I want to focus on the last two here in our policy is that we will emphasize people and through coaching and training and application of state of the art technology and improved processes, we will ensure our workforce's ability to identify and meet PART's asset management needs. This sort of guidance for the whole organization is one of the things that is a benefit for PART in using the TAM Plans. Before the TAM Plans, asset management was done, was taken care of by finance and the director and the operations department. Now, it also includes the Planning department. It brings the whole organization together to temper all their decisions through this eye of asset management, just like the PTAS helps us all to temper our decisions according to safety. Next slide, please. So, what are some of the major benefits to PART by using TAM? Well, basically, it's a check. It's a balance for other things that we have already done because as most of you, we all have processes for managing our assets in place before TAM requirements came into effect. We all have capital reserve funding budgets and capital reserve schedules and depreciation schedules for all of our assets, but this, basically, <inaudible 00:40:20> makes certain that PART is doing these things in the way that FTA would like us to do or requires us to do. So, it is a very good reason for us, good enough reason for us to have a TAM Plan and to continue updating our TAM Plan every year, at least the inventory section of it and like I said, bringing in the rest of the agency is quite useful in thinking of all the things we do and sort of a framework or through glasses of asset management. Next slide, please? So, some challenges for TAM in PART's view-- basically, the timing of everything and coordinating with the MPOs and the state DOT and everyone else that needs to be included, it's a little bit wonky. Timelines for MPOs are different. Timelines for all these groups are not quite the same. Every year, we'll get at least one big MPO saying "What are your targets?" We haven't even started an update yet. We can give you the targets we put together last year. So, we do. It does seem a little disjointed and maybe that is more so an education element that needs to be taken care of with both agencies as well as the MPOs, but the MPOs do seem to be much more used to this clear step-by-step guideline and this is exactly what you do when it comes from things on the highway side of the equation. So, maybe that's also a problem there, that we don't really have TAM so prescribed like some of the other work that an MPO would be involved in. Also, like I said, yearly updates for the TAM targets. I think that is something that's not necessarily required, I believe. We only have to update our TAM every four years, if I'm not mistaken, but I update the inventory every year because every year, something happens where an old bus doesn't get sold off or we have to keep it because we didn't get a replacement as early as we thought we did or would or we don't have the money for the replacement or something happened that didn't quite work out. Generally, things have worked out fairly well, but when it comes to the changing of the targets every year or adjusting them for us, it's been more on the van pool fleet side of things, not so much on the heavy-duty buses. Maybe



the LTVs get a little wonky here and there, but generally, we've been very good at sticking with our schedule and keeping to our targets for the last four years. So, with that, that's the end of my presentation and I guess do I hand it back to you, Tamalynn?

Tamalynn Kennedy: No. Thank you, Kyle, for sharing your experiences. I think as you mentioned, the FTA welcomes feedback on TAMPLATEs and you can share that feedback via our email address at tam@dot.gov and we'll also share that email as well. So, now, we have about 15 minutes left to take some questions. Again, if you would use the Q&A box at the bottom of your screen, you can type your question into the Q&A box and I do realize that both the chat box and the Q&A box are functional. So, I will try to monitor both, but if you use the Q&A box, that is the box that I will see first. There is a question for Kyle that I want to ask him is from Darren, does PART use an EAM system for either rolling stock or capital facilities such as your headquarters building, passenger facilities? Do you have an EAM system that you use?

Kyle Laird: EAM-- well, I am not the operations person. So, EAM may be something I should know, but I don't-- what is EAM, please?

Tamalynn Kennedy: It's just sort of an asset-- just sort of a database that you can do-- keep your inventory in or also do your maintenance through. It checks your maintenance and preventative maintenance.

Kyle Laird: Okay. So, we do-- the maintenance folks do have a database that they use. I don't know that it is an enterprise asset management system. I guess not. It's dossier. It's for preventative maintenance and any other maintenance that are done on our vehicles. But no, we do not use an EAM.

Tamalynn Kennedy: So, you just have more of a maintenance database.

Kyle Laird: Yes. We do have the maintenance database that our contractor uses for all of our preventative maintenance for rolling stock. Otherwise all of the preventative maintenance for our buildings and whatnot, we have our own spreadsheets and things that we've developed to keep up with those, but not something I would call an enterprise asset management system.

Tamalynn Kennedy: So, using a couple of different tools to track assets.

Kyle Laird: Right. Yes.

Tamalynn Kennedy: Norman asks who or what department is responsible for creating an submitting your TAM Plan at PART?

Kyle Laird: The Planning Department. I'm in the Planning Department. I work with and I try-- one of the reasons we were handed this is because of how they Plan, but the other reason, I think, is because we were outside of maintenance or finance or the director, executive department, so, we kind of-- I would go to each of the different departments and work with different people to put it all together, I think, is probably the main reason we were chosen.

Tamalynn Kennedy: And what are those departments that you coordinate with?

Kyle Laird: We have the operations or commuter-- we changed the name just recently to this and I'm getting a brain freeze, but it's basically the operations department. Then of course, we also have our contractor who actually does-- employs our drivers and takes care of our buses and actually does the operation. So, they were sort of like another department brought in and then the executive director, the executive department, and then the finance department and Planning, I guess, we were kind of coordinating it, but not necessarily the most input from our side.

Tamalynn Kennedy: Going to go to the question and answer pod. Doug Wolfe asked "Will agencies be required to use the TAMPLATE at some point?" No. It is completely optional to use the TAMPLATE. It is just a resource that FTA has developed for agencies to facilitate the creation of TAM Plans. Peter Cresuito asks "Are there bulk upload capabilities when considering hundreds of vehicles and assets?" The only bulk import is through your NTD report. The TAMPLATE only connects to the most recently published NTD data and that is the only bulk import that is available. While you can upload other attachments and documents into TAMPLATE, there is no way to populate it into your asset inventory or your condition assessment chapters and it does not work with the Massachusetts DOT supplied Trans AM program, only with the NTD connection. Scroll over here to some other questions. Darren also asks "What are LTV and HD buses? I've never heard these acronyms for rolling stock myself." I have not either. HD I know is used in NTD reporting as a fuel type for hybrid diesel. I would encourage you to--
Kyle?

Kyle Laird: Yeah. It's heavy duty, heavy duty 40-foot bus or heavy duty 30-foot or heavy duty 25 and LTV is light transit vehicle. So, a lot of folks call them cutaways.

Tamalynn Kennedy: Yes. So, what I was going to say is I would refer to the NTD policy manual for what the acronyms and categories are for rolling stock and how you might have a local nomenclature or local acronym that you use to designate your rolling stock, but you'll want to align those with the NTD reporting. Scrolling through the chats here to make sure-- Katie Patterson says "As a state agency, we typically have tried to set slightly more idealistic TAM goals each year, but I've had difficulty reaching those goals due to funding. NTD seems to push back on us each year for being too outside or out of sync of our goals within the fleet data is loaded. Should we give up on our idealistic goal setting? It seems like NTD would prefer us to just use a more realistic goal versus trying to strive for a more updated fleet for our sub recipients." So, what I can say about that is that the TAM program and NTD, although they are aligned, they have different requirements and I cannot speak to what triggers the NTD analysts to ask for more clarification on your goals, but what I can say is that for the TAM program, it is written into the final rule that there is no reward and no penalty for obtaining your TAM performance targets. That's the only information I can provide you as to what the rule says. Like I said, Katie, that depending on what criteria the NTD analysts reviewing your TAM Plan, what strikes out to them I can't say because that is a different program than the TAM program. Okay. I'm just looking a little bit more to the Q&A pod here. Peter also asks "Regarding timeline, our NPO develops the RTP and the tip in March, but our TAM Plan schedule is due in November. How do agencies work through these issues?" One of the things you can do is you can do a-- so, the TAM Plan update cycle is every four years. That's the required update. Now, you can



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realign your TAM Plan with your NPO or other Planning organizations' timelines if you wish. So, what that means is if you haven't updated your TAM Plans since October 1st, 2018, you will need to complete an update by October 1st, 2022. However, if you would like to realign your TAM Plan date, your four-year horizon period of your TAM Plan with your NPO Planning targets, you may do so by doing an update of your TAM Plan. That is completely acceptable to do that to realign to make sure you're doing less reporting and the update is-- again, it's just required every four years. It must have a four-year horizon Plan, which means the information in your TAM Plan must cover a four-year period, but you can choose to update your TAM Plan at any time and there is more information about updating on our website, especially under the FAQ section. Greg asked "We are a tier two agency with subrecipients. Are there assets added to our TAM Plan and how do we include them in our NTD report or do they make their own?" So, that is-- the NTD section part of your question, Greg, I cannot answer because that is based on an individual agreement that you have established with your subrecipients, some subrecipients complete their own NTD report. Some group Plan sponsors complete the NTD reports on behalf of their subrecipients. So, you would have to understand what is specifically happening in your agency. With the TAMPLATE, you may-- if they are a subrecipient, when you use the TAMPLATE to create a group Plan sponsor Plan, you will have the option of adding in subrecipients to your Plan and then in the TAMPLATE, those subrecipients' data, if they were reported to the NTD in your previous NTD report as a subrecipient will load into your Plan in the template. So, it could be-- you could create a TAM Plan as a group Plan sponsor for just your subrecipients or you could also include one TAM Plan in the TAM plate that the sponsor's NTD data as well as the subrecipient's NTD data. Let me just double check the other sections. Susan asked "Do we include third-party rollingstock in the TAMPLATE? These do not reflect in the reported NTD targets." That's correct, Susan. If you do not have capital responsibility for an asset, for a rolling stock asset, you are not required to report it in either the NTD or the TAM Plan. Sorry. You are not required to report it in the NTD. So, that would be something that you would want to manually upload into the TAMPLATE if you chose to use the TAMPLATE under a rollingstock. However, your capital responsibility would be marked as zero and it would not factor into your performance targets. You are correct. We are coming up on time and again, there's-- we have the TAMPLATE application is a tool and a resource that the FTA has provided to transit agencies to help them with TAM Plan compliance. We know it's not perfect. So, we do welcome your feedback. Again, the email address is tam@dot.gov. Also, any questions that we did not get to in today's chat you can email tam@dot.gov and we'll do our best to get back to you in a timely manner. I want to thank Kyle as well and thank you for attending today's webinar. After the meeting ends, you will have the option to complete an evaluation asking for feedback on this webinar and the opportunity to suggest future webinar targets. Kyle, any last words?

Kyle Laird: Thank you, Tamalynn and those of you from FTA for inviting me to talk and I hope I was helpful to folks.

Tamalynn Kennedy: Thank you, Kyle. We look forward to seeing everyone at our roundtable this summer. Again, the presentation is currently posted on our webpage and the recording of this event will be posted on our YouTube channel, accessible through our webpage soon after the event and with that, I will adjourn. Thank you so much.



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