

December 7, 2022





Kevin Olinger, New Mexico Department of Transportation **Tina Ignat,** Metra



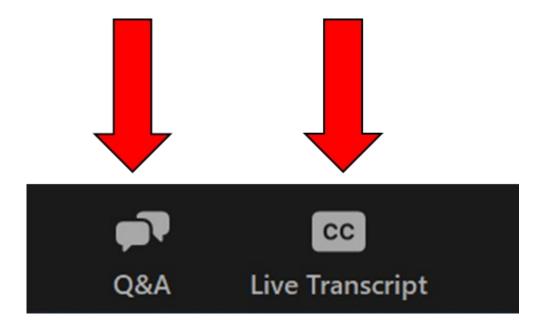
U.S. Department of Transportation
Federal Transit Administration

Presentation Materials

- Available now at <u>www.transit.dot.gov/TAM</u>
 - Select "TAM Events" in the sidebar and navigate to "Webinar Materials"

Zoom Functionality

- Use Q&A pod to submit questions for presenters
- Closed Captioning available by clicking "Live Transcript" and then selecting "Show Subtitle"



TAM Updates

- Now accepting applications for:
 - TAM Best Practices Review, December 23 deadline
 - Apply online and send required documentation to Sarah Skeen at <u>Sarah.Skeen@dot.gov</u>
 - TAM Peer Working Group, December 28 deadline

- Save the date for the 2023 TAM Roundtable
 - OSunday, July 9, 2023, in Boston, MA

Speakers



Kevin Olinger
Transit Bureau Chief
New Mexico Department of
Transportation



Tina IgnatTAM Program Manager
Metra

NMDOT

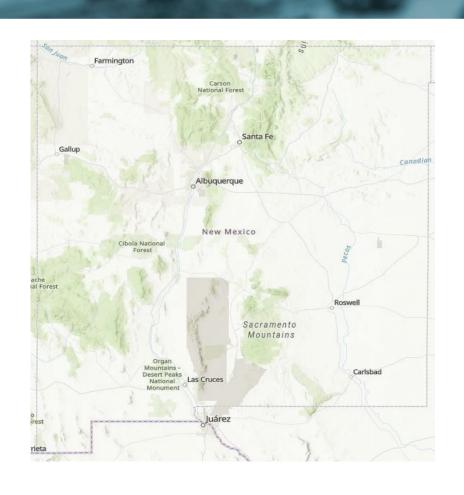
December TAM Webinar on Performance Management

Kevin E. Olinger Transit Bureau Chief New Mexico DOT December 7, 2022

About New Mexico

NMDOT

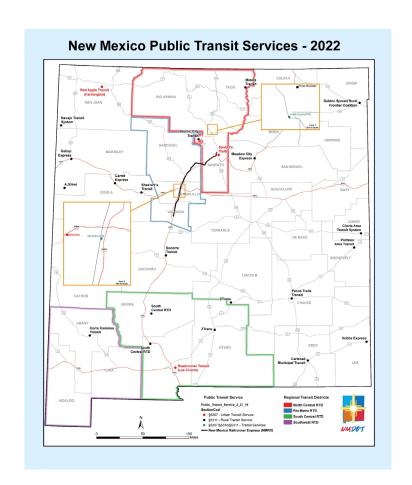
- 5th largest state geographically
- 3rd highest poverty rate
- 3rd lowest population density rate
- Diversity of climate and topographic conditions (extreme heat and cold, desert, prairie, and mountains)
- As a result, we procure vehicles with options above standard technical specifications and need them to last beyond default Useful Life Benchmarks.





Rural Public Transportation in New Mexico

- 21 subrecipients
- Serving 29 of 33 counties
- About 1.5 million passenger trips in 2018 (last pre-COVID year)
- In Federal FY 2022:
 - 933,000 trips
 - 4.7 million vehicle revenue miles
 - Average 5 miles per trip



NMDOT Role in TAM Planning

NMDOT

- Group Tier II Plan sponsor
- Includes 18 of 21 subrecipients
- 450+ revenue vehicles
- Used the TAMPLATE for the first time this year



NMDOT

Key Data Needs and Sources

- Useful Life Benchmarks
 - NM State Management Plan
 - NTD
- Vehicle Inventory
 - NM electronic grants management system
 - NTD





Useful Life Benchmarks

NMDOT State Management Plan

	Тур	oical Characteristics	Minimum Life		
Category	Approx. GVW	Average Cost	Years	Miles	
Heavy-Duty Large Bus	33,000 to 40,000	\$325,000 to over \$600,000	15	625,000	
Heavy-Duty Small Bus	26,000 to 33,000	\$200,000 to \$325,000	13	455,000	
Medium-Duty and Purpose-Built Bus	16,000 to 26,000	\$75,000 to \$175,000	10	285,000	
Light-Duty Mid-Sized Bus	10,000 to 16,000	\$50,000 to \$65,000	8	240,000	
Light-Duty Small Bus, Cutaways, and Modified Van	6,000 to 14,000	\$30,000 to \$40,000	7	175,000	

National Transit Database

Default ULB

Vehic	le Туре	(in years)
AB	Articulated bus	14
AG	Automated guideway vehicle	31
AO	Automobile	8
BR	Over-the-road bus	14
BU	Bus	14
CC	Cable car	112
CU	Cutaway bus	10
DB	Double decked bus	14
FB	Ferryboat	42
HR	Heavy rail passenger car	31
IP	Inclined plane vehicle	56
LR	Light rail vehicle	31
MO	Monorail vehicle	31
MV	Minivan	8
RL	Commuter rail locomotive	39
RP	Commuter rail passenger coach	39
RS	Commuter rail self-propelled passenger car	39
SB	School bus	14
	Steel wheel vehicles	25
SR	Streetcar	31
SV	Sport utility vehicle	8
ТВ	Trolleybus	13
	Trucks and other rubber tire vehicles	14
TR	Aerial tramway	12
VN	Van	8
VT	Vintage trolley	58

- Two slightly different databases (NTD and our electronic grants management system)
- Records do not match one-to-one
 - NTD assigns one RVI ID to all vehicles in the same fleet
- Fields common to both databases are missing information
 - RVI ID
 - Agency ID



- Step 1: Reconcile vehicle inventory data using manufacture year, make/model, seating capacity
- Step 2: Use vehicle inventory data to reconcile vehicle types and ULBs based on GVWR and original purchase price
- Step 3: Update NTD vehicle inventory at time of annual reporting



NTD Narrative Report

- Your ULBs, especially if different from NTD defaults
 - Mileage and/or different vehicle ages
- Your performance results based on your own ULBs
 - Likely will not match NTD outputs
- Any policies regarding investment priorities
 - Subjective vehicle condition assessments
 - Revenue vehicles have priority over facilities



- Any external factors that might affect your ability to replace or maintain assets
 - Cutaway bus delivery lag times, price increases

NMDOT

Contact Information

Kevin E. Olinger

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(505) 469-3595

FTA WEBINAR



TAM

Performance targets and their connection to Fleet Management practices

Presented by Tina Ignat
Manager, TAM Program
Metra Commuter Rail | Chicago











What to Expect



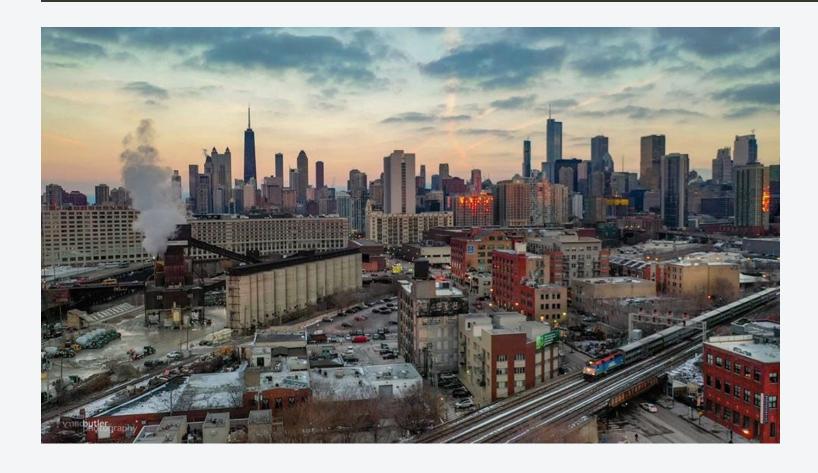






- Objective
- Context of Agency
- Fleet Maintenance & Federal Reporting
- Improvement Program

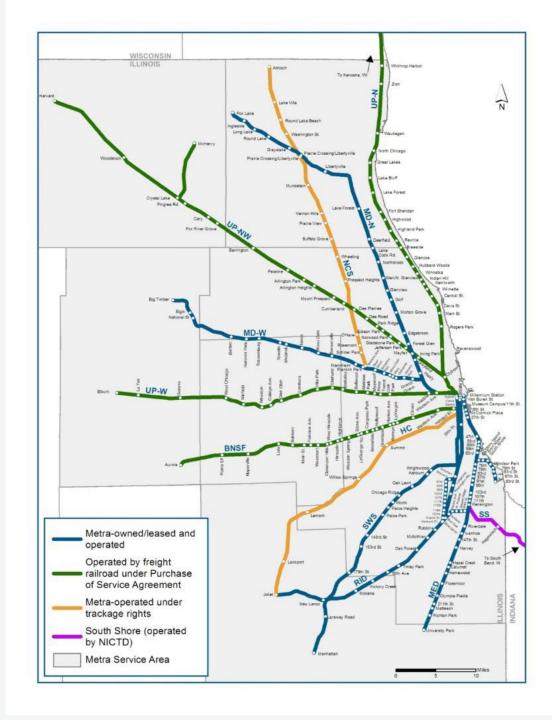




OBJECTIVE

This presentation will share the strategies and processes for modifying the FTA ULB for equipment rubber tire fleet, how age/mileage is being tracked, methods for condition assessment, and NTD Reporting including developing performance targets





- 14.1 million passenger trips in 2021*
- 582 weekday trains
- 269 Saturday trains
- 185 Sunday trains
- 242 stations
- 1,155 miles of track
- 488 route miles
- 173 locomotives
- 861 diesel passenger railcars
- 182 electric propelled passenger railcars
- 926 bridges
- 565 grade crossings
- 24 rail yards
- 92,000 parking spaces
- 12 electrical substations
- 3 electrical tie stations
- 12 fuel facilities



Governance in Illinois







MPO

Oversight Agency to Service Boards







Bus & Heavy Rail Commuter Rail Suburban Bus & Paratransit



Category	Asset Inventory	Assessing Condition
Equipment	•All non-revenue service vehicles and equipment > \$50K used in the provision of public transit, except 3rd-party equipment assets	 Only equipment with direct capital responsibility, no third party assets
Rolling Stock	• All revenue vehicles used in the provision of public transit	 Only revenue vehicles with direct capital responsibility
Infrastructure	• All infrastructure used in the provision of public transit	 Only infrastructure with direct capital responsibility
Facilities	 All facilities used in the provision of public transit (excluding bus shelters) 	 Only facilities with direct capital responsibility (excluding bus shelters)

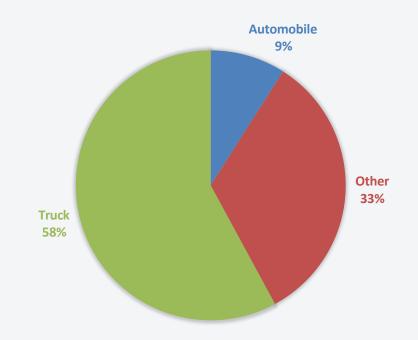




Fleet Maintenance



RY2021 EQUIPMENT BREAKDOWN









Fleet Maintenance



Asset Category	Asset Class	Total Fleet	ULB	Within SGR	Over SGR	2021 Target	2021 Performan			Met/Missed 2021 Target	2022 Target
	Commuter Rail Locomotive	170	30	74	96	53%	56.47 %)	3.47%	Missed	70%
Rolling Stock	Commuter Rail Passenger Coach	850	30	482	368	44%	43.29 %)	-0.71%	Met	44%
	Commuter Rail Self-Propelled Passenger C	186	30	186	0	0%	0.00%		0.00%	Met	0%
Asset Category	Asset Class	Total	ULB	Within	Over	2021	2021		Difference	Met/Missed	2022
		Fleet		SGR	SGR	Target	Performan	nce		2021 Target	Target
	Automobiles	50	7	38	12	23.21%	24.00 %	·)	0.79%	Missed	25%
Equipment	Trucks and other Rubber Tire Veh	600	7 & 14	422	178	33.54%	29.67 %)	-3.87%	Met	42%
	Steel Wheel Vehicles	79	25	50	29	42.67%	36.71 %)	-5.96%	Met	40%
Asset Category	Asset Class	Total		Within	Over	2021	2021		Difference	Met/Missed	2022
		Facilities		SGR	SGR	Target	Performan	nce		2021 Target	Target
	Passenger Stations	243		225	18	9.00%	7.75%		-1.25%	Met	9%
Facilities	Passenger Parking*	312		287	25	3.0070	7.7370		1.2370	Wice	370
	Maintenance & Administrative	106		94	12	N/A	11.32 %		N/A	N/A	13%
*Only passenge and targets	er parking with capital responsibilit		·	ormance							
Asset Category	Asset Class	Total Track			2021	2021	2021		Difference	Met/Missed	2022
		Miles			Average	Target	Performan	nce		2021 Target	Target
Infrastructure	DO & PT Performance Restrictions	1085.9			54.75	5%	5.04%		-0.04%	Missed	6%

Performance Targets



Asset Category Asset Class		Total Fleet	ULB	Within SGR	Over SGR	2021 Target	2021 Performance	Difference	Met/Missed 2021 Target	2022 Target
	Automobiles	50	7	38	12	23.21%	24.00%	0.79%	Missed	25%
Equipment Trucks and other Rubber Tire Vehicles		600	7 & 14	422	178	33.54%	29.67%	-3.87%	Met	42%
	Steel Wheel Vehicles	79	25	50	29	42.67%	36.71%	-5.96%	Met	40%







Fleet/Equipment





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metrarail co

April 19, 2019

VIA Electronic Delivery at mshadoni.smith@dot.gov

Mshadoni Smith TAM Program Manager, Office of Budget and Policy Federal Transit Administration 1200 New Jersey Ave., SE Washington, DC 20590

Re: Useful Life Benchmark for Non-Revenue Vehicles

Dear Ms. Smith:

The Northeast Illinois Regional Commuter Railroad Corporation (d/b/a Metra) submits the following Useful Life Benchmark (ULB) request for use in Metra's implementation of the Federal Transit Administration's (FTA) Transit Asset Management program. As noted by the FTA in its "Default Useful Life Benchmark (ULB) Cheat Sheet," the FTA has set a default ULB as the expected service years for various vehicle classes¹ citing eight (8) years for automobiles and fourteen (14) years for (trucks)/other rubber tire vehicles. The FTA ULB is the average age-based equivalent of a 2.5 rating on the FTA Transit Economic Requirements Model (TERM) scale.

However, the FTA permits transit agencies to "adjust their Useful Life Benchmarks with approval from FTA." Accordingly, for the reasons set forth below, Metra respectfully requests approval of a seven (7) year ULB for its automobiles and trucks/other rubber tire non-revenue equipment service vehicles (collectively, "Vehicles."). Metra believes that the use of this ULB will accurately and closely reflect the usage of Metra's Vehicles. Indeed, Metra's internal policy regarding maintenance of its Vehicles has a long-standing seven-year useful life. The requested adjustment will improve Metra's reporting and implementation of TAM and make Metra's policies consistent across the board.

Overview of Metra

Metra is one of the largest and most complex commuter rail systems in North America, serving a six-county region of more than 3,700 square miles. The agency provides service to and from downtown Chicago with 11 routes totaling nearly 500 route miles, approximately 1,200 miles of track, 847 bridges, and over 500 grade crossings. The commuter rail agency uses close to 1,200 pieces of rolling stock, storing and maintaining this equipment at seven maintenance facilities across 24 rail yards. Metra also oversees and maintains 242 passenger stations with over 400 station platforms which also have approximately 90,000 passenger parking spaces along our system.

As part of its operations, Metra owns 92 automobiles and 453 trucks and other rubber tire Vehicles for a total of 545 Vehicles (This excludes non-revenue equipment construction vehicles which will remain with the default

Metra Support Vehicles Policy

METRA POLICY

FM-00.01 REFERENCE NUMBER

II.10 Periodic Inventory Assessment

Metra's departments and Fleet Management will regularly assess, and inventory support vehicles as defined in the Periodic Vehicle Assessments and Inventories section in the FM-00.01 Procedure.

II.11 Vehicle Maintenance and Replacement Keys

All maintenance and repair service for Metra support vehicles will be managed by Fleet Management. (See FM-01.01, Repair and Maintenance of Metra Vehicles.) Employees are responsible for vehicle keys and their replacement.

II.12 Fleet Replacement

Each Metra-owned support vehicle will become eligible for replacement, based on vehicle mileage and age. If a vehicle incurs substantial damage from a collision or a major component failure occurs (engine or transmission) may be replaced up to 18 months early regardless of mileage if the early retirement is beneficial to Metra.

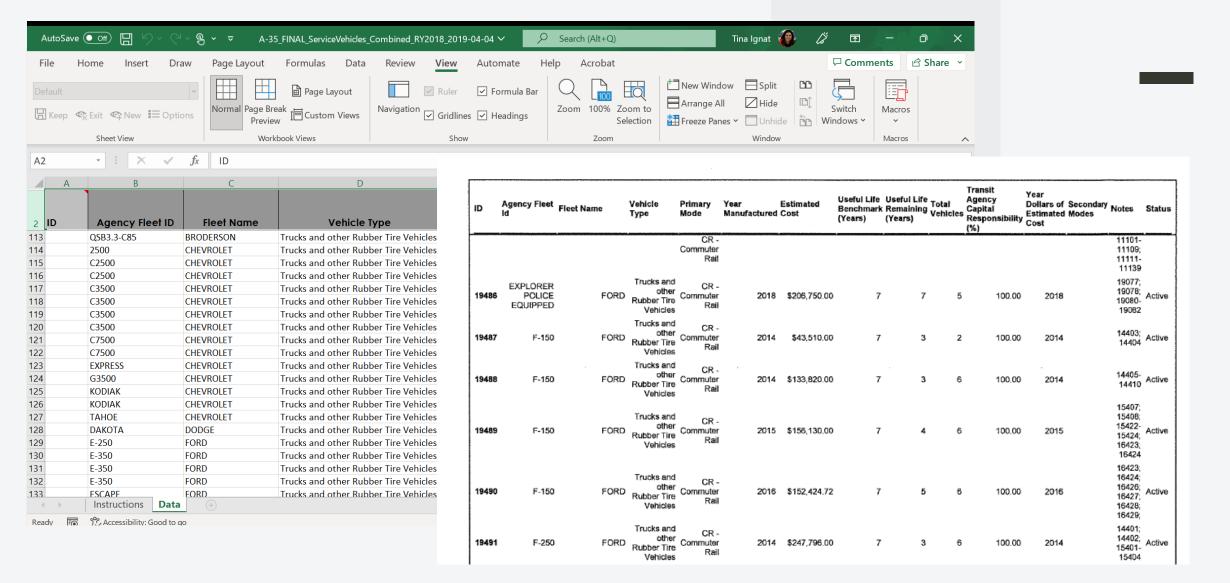
Metra-owned Retirement Re			
Vehicle Type Age Mileage			
Sedans, Supervisory SUVs,			
Vans, Trucks	7 Years	125,000 Miles	
Police Patrol Vehicles	5 Years	100,000 Miles	

Vehic	le Type	Default ULB (in years)
AB	Articulated bus	14
AG	Automated guideway vehicle	31
AO	Automobile	8
BR	Over-the-road bus	14
BU	Bus	14
CC	Cable car	112
CU	Cutaway bus	10
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Modifying ULB



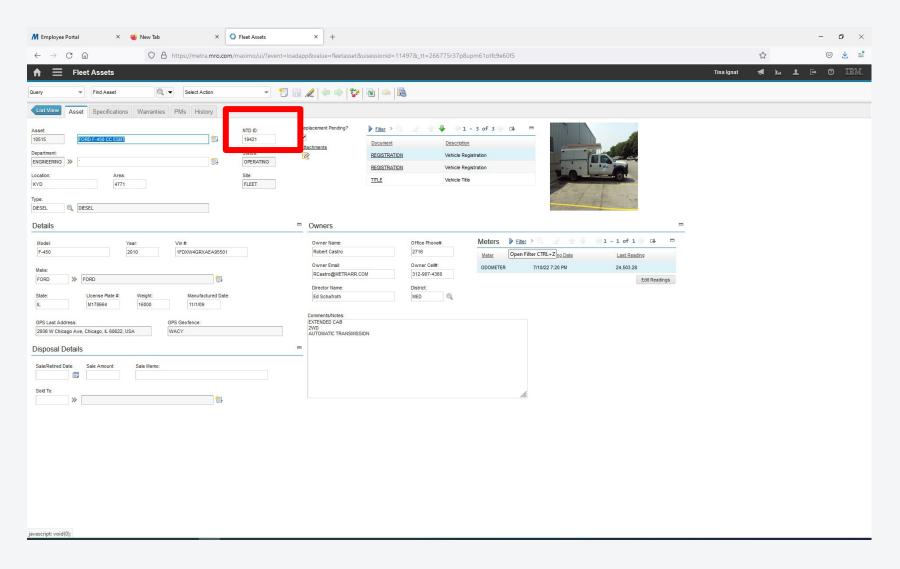
¹ https://www.transit.dot.gov/sites/fta.dot.gov/files/docs/FTA TAM ULB Cheat Sheet 2016-10-26.pdf (last visited April 5, 2019).



NTD Reporting



System of Record

















Metra

Transit Asset Management Plan

2022-2026 HORIZON

Table 15. Asset Management Implementation Actions

IMPLEMENTATION ACTION

IMPLEMENTATION ACTION	STATUS AND NEXT STEPS
Develop an Asset Management Policy, Objectives, and Strategy that are aligned with overall strategic objectives, communicated widely and approved by the relevant agency stakeholders, and subject to regular revision.	Metra's first TAM Policy, which is aligned to overall strategic objectives, was signed on August 8, 2018. The policy must still be communicated throughout the agency, which will occur as part of a broader communication campaign (including as part of new-hire onboarding) that will last for the duration of the TAM horizon period, contributing to culture change around implementing asset management.
Complete development of the Asset Management System (AMS) as a comprehensive repository of all asset management-related policies, plans, and procedures; available online internally to all staff.	Metra's TAM Policy and Plan form the initial documents that will compose an AMS. More work is required to further build out the AMS, make it accessible, and promote awareness.
Develop an overarching TAM Plan, compliant with the FTA final ruling, and update the TAM Plan through the horizon period when a significant change occurs.	This document represents the first version of Metra's TAM plan, and was developed with input and buy-in from departments across the agency. It is expected to undergo substantial revision during the current horizon period as Metra continues to improve its asset management processes.
Develop a formal capital project prioritization methodology, defining the criteria for deciding which projects better justify funding than others, including alignment with Metra's strategic goals.	Metra has developed a capital project prioritization methodology for the FY2019-FY2023 capital program. Additional work is required to communicate the new methodology internally and to improve the data that informs the prioritization.
Define an asset condition assessment approach that describes how, when, and what is measured for facilities, rated using a 1 to 5 scale.	Metra is developing a condition assessment methodology for facilities to evaluate one-quarter of Metra's facilities this year. As the process is tested, it is expected to undergo revision.
Define an asset condition assessment approach that describes how, when, and what is measured across all asset classes. Condition rating parameters may differ across asset classes but the scoring scale, e.g., 1 to 5, should remain consistent to enable comparison.	In addition to the condition assessment methodology for facilities, an approach to assigning a reliable condition rating has also been developed for rolling stock assets. Development of assessment methodologies for other asset classes have not yet begun.
Craft and carry out a plan for improving inventory collection, storage, and update methods to support TAM.	Metra has created a plan for increasing the use of Maximo to store asset information in order to inform decision-making.

STATUS AND NEXT STEPS

achieve and to embed throughout Metra. Carrying out these activities will affect a range of business processes and may require cultural change.

Metra looks forward to building on the first steps taken in developing this TAM Plan, in order to grow a

Metra looks forward to building on the first steps taken in developing this TAM Plan, in order to grow mature asset management system that will enable improvement of Metra's state of good repair and ensure the successful operations of its passenger rail network for many years to come.

Page 32 Transit Asset Management Plan
Metra



Asset Management Implementation

Table 14. 2022-2026 Asset Management Implementation Actions

IMPLEMENTATION ACTION	DESCRIPTION
Prepare for EAM Implementation	The EAM implementation will require creation of business requirements, against which functional requirements of new software can be created and vetted. Business requirements will be based on business processes, which will need to be in place to enable Metra departments to articulate how activities are carried out within and across teams and business functions within the EAM system. To prepare for EAM implementation, Metra will identify and set up required contracts and prepare foundational data elements and processes for all asset classes. As referenced in Table 13, Metra has initiated preparation for the EAM implementation by carrying out a detailed review of asset hierarchies and asset-related data sets, as well as related databases across the agency. Linked to this, asset condition assessment approaches, also referenced in Table 13, are examples of a business process that will be necessary to define prior to EAM software implementation. Metra is working towards completion of Asset Class Condition Assessment Guidelines, which will ultimately inform functional requirements of the EAM implementation. Alongside technical process and data preparation, Metra will work toward preparing its people to actively participate in the documentation of business requirements, and ultimately to adopt the new EAM toolsets. Change management activities will therefore be a core component of EAM implementation preparation preparation preparation in the members and the process and data preparation will therefore be a core component of EAM implementation preparation preparation preparation preparation preparation preparation in the documentation of business requirements, and ultimately to adopt the new EAM toolsets. Change management activities will therefore be a core component of EAM implementation preparation preparation preparation.
Implement core asset management functionality for all asset classes	Having prepared for EAM implementation, Metra will proceed to implement new EAM functionality which will support core business processes related to asset management, maintenance and operations. Components of this functionality may include: Asset Registry: the ability to identify the systems, assets and components which Metra owns and their current status, as well as essential identifying data such as year of installation, make, model and serial number. Asset Condition Assessments and Inspections: the ability to make field-based observations of asset condition within a handheld device, where appropriate, and submit data electronically, perhaps incorporating asset tagging and geospatial referencing. Work Requests or Corrective Actions (also known as Trouble Tickets): the ability to receive, log and route unplanned requests to the appropriate resource(s) for resolution and close. Requests could be categorized by urgency and importance, based on criteria which would be defined as part of 'preparation for EAM implementation'. Work Planning and Management: the ability to proactively schedule routine and cyclical work activities, as well as work arising from initial responses to work requests. Warranty Management: the ability for users at all levels to identify assets, materials, parts and components that have a warranty, so that the most cost-effective decisions can be made when determining interventions. Cost Capture: the ability to associate labor, equipment and materials costs to work orders, as well as the ability to assign values to assets as an enabler of lifecycle cost analysis (LCA). Reporting: the aggregation of large data sets into easy-to-understand, visual reports, which enable stakeholders at all levels of the agency, as well as external parties, to understand real-time status of critical processes. Given the magnitude of this undertaking, which will entail decommissioning of existing systems as well as transfer of data sets and wide-scale training. Metra will require support of subject matter ex

Improvement Program Metra

<u>Metra</u>

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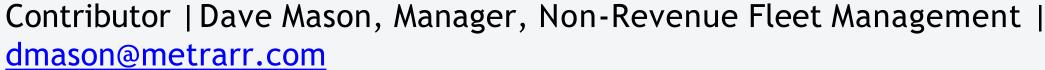
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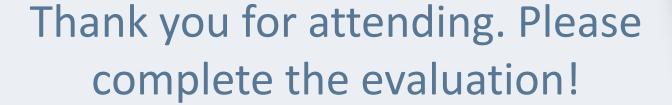
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Q&A









U.S. Department of Transportation
Federal Transit Administration