

>>Eric Papetti:

Good afternoon and welcome to Maintaining MomenTAM the webinar here via the Federal Transit Administration. Thank you for joining us. My name is Eric Papetti, the acting TAM program manager and I just wanted to welcome you all and kick off the meeting before we get to our main presenters. Next slide.

Before we get started, I wanted to make sure you all are aware of a couple of good things. First of all, we have scheduled our TAM Roundtable for 2021. It will be a virtual event, as it was last year. And it will be taking place on June 22 so please save the date. We have a webpage for that up on the main TAM webpage right now you can go back to that to find the registration link over the coming next couple of weeks.

The next thing I wanted to highlight for everyone is the updated narrative report template, which is also now available on the TAM webpage. We hope this will be a new and valuable resource to you all as you prepare your narrative report submissions for the coming year. You can find that, right, now. Please let us know if you have any questions about that.

Next slide, please.

We are about to hear from presenters from two different agencies speaking about their experiences with maintaining MomenTAM over the last year. Once we are done hearing those presentations, we will have a question-and-answer period where we will be able to field questions for them.

The first agency we wanted to mention was Denver RTD. We have with us today Lou Cripps. Lou Cripps is the manager of Asset Management for The Regional Transportation District in Denver, Colorado. RTD as a multimodal agency serving a population of over 2.9 million people across 2,300 square miles. He is a current co-chair for APTA Performance-Based Planning Subcommittee, the Institute of Asset Management Colorado chapter and co-author of Building an Asset Management Team.

Once we hear from him, we will be hearing from Casco Bay. With us today from Casco Bay is Paul Pottle. Paul is the Director of Projects for Casco Bay Lines where he oversees all of Casco Bay Lines capital project work and assist with contracting efforts associated in the procurement. Prior to joining Casco Bay Lines in 2016, Paul worked for an engineering firm for five years where he focused on marine infrastructure and before that Paul served as an Assistant Program Manager and a Project Manager with the Maine Department of Transportation for 30 years with a focus on alternative modes of transportation, especially in the Marine area. Paul has had an association with Casco Bay Lines for his entire career in various roles.

During the Q&A section we will be joined by Hank Berg. Hank is the current General Manager and CEO of Casco Bay Lines. He joined the district in January of 2010. Previously Hank worked nine years at Taction, a Maine based premier customer contact center representing some of the country's most trusted brands. Hank served

as the roles of President, Chief Operating Officer and Chief Financial Officer during his tenure. Prior to Taction Hank served for more than 20 years in the high-tech industry at Transcept, a startup firm, and Sanders a Lockheed Martin company. Thank you all for being with us here today. We can move onto the next slide and we look forward to hearing from Lou.

>>Lou Cripps:

So I thought I would start off today kind of setting the stage. I'd like to maybe start with a question. The question is basically did your 2020 feel like this? We all experienced dramatic reductions in our service levels due to the pandemic. Frankly, I think this might have lasting impacts on public transit with working from home becoming more prevalent. Also we saw real reduced service and revenues, which naturally kind of forced us to talk about budget cuts and layoffs. We also experienced some outside scrutiny from an appointed accountability committee as we transferred the leadership to a new CEO. And with all this we are still facing continued pressure to expand and build another rail line. So my guess is that most folks on the call have experienced similar situations, some different challenges regardless of the size of your agency. We are all facing some real challenges this year. So in this next slide we will talk about how COVID changed Transit Asset Management.

So actually did COVID change Transit Asset Management? My answer is no, right. The constraints still exist within public transportation. Our needs always outweigh our resources. So back in 2016, the Federal Register said that SGR grants would not be enough to address the backlog that we would not have enough resources and that's been true for many years right. This next statement on the bottom left there, it's also five years old. But it sure, looks to me like it could have been written yesterday, that we need to be more strategic, right. In these physically constrained times, transit agencies will need to be more strategic in the use of available funds. I think that's more true now than ever. And then when we look on the right side here, MAP-21 also introduce this idea of stewardship and a call to change. It makes sense to take care of stuff we have first right. There is an underlying message here and I'm not sure anyone really wants to say out loud so I will right. That public transit's best thinking has produced \$90 billion of backlog. So we can safely assume that we have to evolve or change. Change the way we do business to get a different result or at least at a minimum kind of stop the backlog growth. So following a plan especially in a time of crisis ensures that we continue to evolve. So that takes me into the next slide here which is this -- I'm struggling with the emphasis here, but it is MomenTAM amid a crisis. We've already covered the idea 2020 was rough for everyone. But it didn't change the need to be more strategic with our available funding. Then I'm going to talk just a little bit about why we should trust our plans and the TAM plans we all developed and then finally I'm going to kind of apply it to RTD and I'm going to share a story how we used our plan to maintain momenTAM amid this crisis. Just one side note here, all I'm going to cover today I think is applicable whether you are Tier 1, a Tier 2, a group TAM plan sponsor, a participant. The only difference is the level of detail or how much resolution we need in those plans.

So on this next slide -- we have to trust our plan or maybe more appropriately why we should trust the plan. The let's talk about that. Next slide.

So I think a lot of agencies see TAM plans as a compliant exercise but if the goal is to evolve it should be viewed as a coordination of activities or a management system framework so if we look at this here, a management system is the way in which an organization manages the interrelated parts of its business in order to achieve its objectives. We all want that. That is our goal. So in my opinion the TAM plan and more specifically element number nine listed on the left here, it's included in all fundamental components of any management system framework. If we just looked down this list, what assets do we own, what conditions are those assets in? How do we make investment decisions around those assets? What is the result of our decision-making process? What are our guiding principles? How do we integrate asset management into our organizations? What are the things we need to do in an annual basis for TAM? That's our key annual activities and who's going to do it. What resources will it take to keep TAM alive and this element number nine and then did we get the results we set out to achieve. If not, you've got to rinse and repeat. I cannot think of a time where these elements didn't matter but they matter now more than ever. If we go on to this next slide this is what it looks like at RTD. So the evaluation plan or continuous improvement is just a plan do check the cycle. It's part of all management system frameworks. In the case of asset management, we sometimes -- we use the 39 subjects or the ISO 55,000 framework but, again, it is why is continual improvement important and remember from the previous slide they management system is the way in which our organizations manage the interrelated parts in order to achieve our objectives. So what happens when our constraints, but not our objectives or our purpose change? This is where these management systems like we have to lean on that framework, that leveraging that continual improvement element is so beneficial. As the needs of our customers changed, we can systematically adapt to the change with that evaluation plan step. I'm going to get more into how RTD does that. We use kind of those elements you see going down the right side of the slide

[Overlapping Speakers]

So now I'm going to kind of make a leap here and I'm going to say or assume the FTA, they are planning on our 2022 TAM plans being different than our 2018 TAM plans. We've seen a lot of change so for continual improvement at RTD, we use that word synonymous with a generational approach. On the next slide I'm going to show you that example how it works at RTD.

So this next slide here, this is the best example of a generational approach I can come up with and this is our TAM plan. RTD is currently working on the fourth iteration of our TAM plan so why are we taking this approach? By the time we finished our 2018 TAM, we already thought of ways to improve it, so we've updated the plan again in 2019 and then again in October of 2020. Each year we are able to make some incremental improvements. We didn't throw it out. Not a wholesale change, but we keep doing that next right thing. So our intent was to keep the plan as current as

possible to ensure that it remains relevant, and it was at the front of everyone's mind. Because 2020 has shown I think all of us that a lot can happen in 12 months. If we look at this from our perspective here at RTD, the primary output of the TAM plan is the prioritized list of investments. There are, of course, many other advantages to having this updated list and we will talk about those in the context of RTD on the next slide. There you go. So we have to trust the plan because it's our prioritized list of investment so here we see where that sits. First and foremost, it's a primary output of our TAM plan. It is our action list; it's our action plan so don't get me wrong. We don't strictly follow the plan blindly and do nothing else, but at this point in our maturity we are much more aware of what we are saying no to and when approving other initiatives like the impact that has -- that's going to have. It's that old saying of follow the money. If we follow the money, we can see what is most important to your agency. And the next item here is the list of shovel ready projects like other agencies we were able to actually capitalize on some of the shutdowns are reduced service levels and we were able to execute some infrastructure upgrades because we had track access we had not had before then.

So our AMP was leverage to do that and we used this list to assist us and looking for some grant opportunities because we have a prioritized list of needs. Capital needs inventory and we could go out and look for what grants aligned with the things we need to do at RTD. This gives us that prioritized list of investments and it was created collaboratively. So we did this using cross functional teams of asset stewards. So all the different groups across the agency and we do that with one step below the Senior Leadership Team so one step closer to the front lines allows us to really understand those assets better. And then we actually updated our fiscal policy for the entire agency in 2020 and it now references the TAM plan as we give priority to asset renewals over expansion, and this was kind of a huge win for us. This points everything back that TAM plan. So this brings me kind of to the story of how we leveraged our plan to maintain the MomenTAM in the middle of this crisis. So if you take away one thing from this story it's trust the plan. Next slide.

So how did we leverage our plan? I think 2020 could be summed up in these five steps. We did some revenue projections early on and we found the district was \$266 million shortfall just to fund the year. So shortly after that was identified our CEO at the time put together this COVID fiscal sustainability task force. So I'm going to generalize here about the primary purpose of the task force was to figure out what to cut from the budget. Our options were I'm sure similar to some options that your agencies faced. Do we cut service? Do we cut asset renewals, maintenance, replacement, administrative overhead? Do we take a cut across all of those? But only one of these areas at RTD had a recently refreshed and trusted plan. Like I mentioned we had just finished updating our 2019 TAM plan in October, so about five months prior to COVID taking effect. So we were able to leverage this trusted plan that we had created and updated, and we did all that planning during a much less stressful time. I like the saying that luck happens when preparation meets opportunity. That fits really well here. So the agency was able to use that prioritized list of investments to easily identify which assets we could differ, and which assets still remain

top priority because we had done all that work ahead of time. Were there adjustments to the plan? Absolutely because I can assure you our plan was not optimized for a pandemic. But we only had to make some tweaks based on what things actually had changed and it didn't throw our plan out the window right.

So kind of the next one is on to other matters now that the task force was able to focus on some of the more difficult topics like furloughs and layoffs, it was partly because we had a pretty good grasp on our assets, so we didn't have to try and manage all the different moving pieces that once. We kind of had a plan we could lean on there. But why were folks here willing to trust the plan? It is for the same reasons we covered in the previous slide. We used a management system framework. We follow the FTA guidance. Having that management system framework allowed everyone here to understand the people, the processes, the systems that we use to create our plan. The creation of this plan was transparent, so people knew how the sausage was made. It wasn't perfect, but they understood what they were getting. We talked about this several times this continual improvement. People understand that we've taken significant steps to make the plan more accurate or to create a higher resolution. I like to think about it as you have a really low-resolution image highly pixelated. As we move this plan forward and we continue to iterate and take that generational approach we are adding resolution so that picture comes into focus and that eliminates that feeling of burden that everything has to be perfect before we can make progress. That gives us momentum right. That we can keep moving forward even when things aren't perfect because we will keep making those little ratchet clicks to advance. So generally speaking we have a plan for our assets, it made the 2020 experience here less eventful it's not that it wasn't hard. Again, we had to make some tweaks on the fly, but we didn't abandon our plan or throw this out the window. We trusted the plan.

So let's now talk about maybe a couple of key takeaways from this next slide. I like this slide first and foremost because fundamentals didn't change. Our needs like they just outpace our resources and we always have. So logically this means we need to be more strategic in the use of our available funding and it really means that decisions are now they are good for current us or future us. We understand the trade-offs and optioneering or the choices we are making between these decisions that we are able to systematically manage backlog as part of our objectives for the agency. Perhaps even more critical nationwide we can start looking at this backlog. So objectives didn't change, sure the constraints tightened but our purposes is simple, we just move people from where they are to where they need to be. Last, but not least work your plan, stay focused. Everything else is a trap. Distractions are waiting on every corner. Having a plan really helps us focus on our purpose and our objectives. It keeps us from moving away from what we need to do and keeps us moving forward. Momentum. So everyone knows I can't do a presentation without at least one analogy, so TAM plans are very similar to farming. We have an idea of what we would like to accomplish or in this case what is the harvest we want. We follow best practice. We start out from seeds. Our plan tells us when to plant, how much water, et cetera. And then there is care and feeding. This is just working that plan. Just staying focused. We need to look over our plants and keep an eye on things. Then at some point you

do a harvest. Sometimes the harvest is really good and sometimes the harvest wasn't what we expected. When either of those happen, we can go back and say let's make adjustments, let's start the process over. Rinse and repeat. I'm sure you get it. You can't go out and randomly spread some seeds around and do nothing for a year and come back and have something good and it's the same for our TAM plan. Again on this next slide I won't be redundant. We can kind of move forward, but at RTD we were able to maintain momentum during a crisis because we had a solid plan, people trusted the plan and we were able to use it at a time when things were pretty chaotic here. I'm sure they were your agency too. This very last slide I just want to say thanks for your time today and most important I want to thank all the hard-working people on the asset management team. Everything you see, all the good work that's done here at RTD is because we have a great team. It's not because of me. That's it. Thank you again.

>>Paul Pottle:

I'm Paul Pottle, I'm with Casco Bay Lines and thank everyone for joining this webinar and listening to what it's like to maintain your momentum with your TAM plan. Before I share a little about our plan on how we are maintaining that momentum, it would be nice to know a little bit about who we are because we are a little bit different operator than probably a lot of you where we operate a ferry service. Next slide.

So currently Casco Bay Lines we service six year-round islands and Casco Bay. We service a seventh one seasonally and the type of people we have the residents of the islands, we've tourists that visit and visitors out there for day trips or whatever or may be visiting family and friends. We have contractors, businesses and also provide the mail service for all these island communities as well as we transport the kids to and from the mainland to attend schools and then we have the commuters. Everybody who lives on these outer islands can actually ride our ferry, get in and work a job on the mainland and get back home and night. So on top of the people we serve we also serve their goods and services. Nothing -- hardly anything goes out to these islands without going through our service. So our service becomes vital to the livelihood of these various communities. Next slide, please.

So two understand us a little bit you might need to understand how we are organized. We've a 12-member Board of Directors. 10 of them are elected from the islands that they live on. And one is appointed from the city of Portland and one is appointed by the state of Maine. They serve for three-year terms. So under that we could have upward of 3-4 new members in any given year. The board sets our policies and helps to set priorities and focus on the district. On top of our Board we are also set up under special and private laws for the state of Maine and because of this set up we have certain activities that are governed by the Public Utilities Commission making us a little probably unique to most. On top of that because we operate a ferry service, we come under the U.S. Coast Guard jurisdiction and because of the marine facility and the nature of what we do we also come under Homeland Security requiring us to have a security plan in place that's approved and that has to be adaptable for the various threat levels that might be encountered from time to time. And because we get a lot of

our capital asset money from Federal Transit Administration, we also have to meet their rules and regulations as well. So Next slide, please.

So we are a small operator. We are a Tier 2. We only have five vehicles five revenue vehicles, but they are very large and very expensive revenue vehicles. We have five ferries. One is a passenger vehicle ferry and three are passenger and freight type ferries with some very limited vehicle service and the fifth one is mainly a passenger with some limited freight that acts as our spare vessel. On top of our ferries we also freight equipment because of the freight we move to the islands we need to have a number of items like cranes and forklifts and pallet jacks and a variety of carts and other loading apparatuses to be able to manage that. Next slide.

Because we are a ferry service it is not uncommon for our terminal or our mainland facility to have several vessels at the same time that are getting prepared to load. Our vessels carry 399 passengers on top of vehicles and freight and so it is not uncommon especially in summer months or our busy months, that we could have upward of 1,000 people or more waiting to get on the ferries and as many getting off these ferries making for a very crowded site. On top of that we are trying to deal with freight movements and vehicle movements and people that are coming to the waterfront to enjoy getting access to the water. This requires us to have a fairly good waiting areas as well as a good freight system and it also means we have to rely on the equipment we have so it doesn't break down. On top of our terminal facility we operate the piers and I'm sure many especially the bus type operations have their own terminals as well as bus stops and our stops are pretty extensive. We need a pier we can take a couple hundred thousand -- a couple hundred-ton boat into and run into it several times a day and we have to operate over the tidal range that changes 14 feet or up to 14 feet twice a day and we do that 365 days a year so it's a difficult thing and these are very complex and very expensive facilities. Next slide, please.

So we found we needed to break our assets down we couldn't leave the assets as just the five ferries because the ferries have a 30-year life and with that 30-year life, you wouldn't necessarily ever get around to looking at it, but there are components within the ferries that are expensive and some not so expensive that break down or need to be replaced on a much more frequent basis than that. So we had to break our assets down so the ferries we broke down into things like our main engines, our gearboxes, generators, radars, radios, elevators and lifts, and the various controls that we have so that we could track some of those things because of some of these things break down with our Coast Guard requirements, we are not able to operate we would have to tie up a ferry and without having a lot of excess capacity it can be detrimental to the communities that we serve. Next slide, please.

So along with breaking down the ferries we also broke down the piers. The piers break down into things like fender systems and movable gate ramps that help us accommodate the tidal cycles that we have to deal with. That creates motors and pumps depending on the type of system we have. We have vehicle transfer bridges. None of these are inexpensive and they require a lot of maintenance and activity. To

go along with them we have our freight equipment. We have things like cranes and forklifts. Two of our vessels have cranes on them in order to manage the freight movements that we do. So as a result, we have to maintain those if we want to be able to provide those goods and services to the island along with the people that we serve. So all of these things are essential to our ability to support the island communities. Next slide, please.

So as we broke our plan down, we had to really kind of homing in on our focuses so we would be able to use this plan. Just developing it because it was a requirement was not going to be good enough, we wanted to have something that would be a tool that would help us in our day-to-day operation so we needed a document that was simple and understandable. We have a lot of different people that have different focuses so we use this as a tool to educate our board members and we also use it as a tool to inform our staff of our condition and the things they may need to do to help direct attention to the appropriate focus. We also he was our plan to help us develop our short-term and long-term capital projects. Like everyone else we have more needs than we have resources and it's easy to lose sight of some things that might be important but the plan we have helps to refocus those, so we are not going after things that are not as critical as some others. Along with that we have changing members whether it's a changing board member or a changing staff member and to help educate them and bring them up to speed on what we do and what we have and how critical it is and why we do the things we want to do. The plan helps us to be able to do that. And then with the various entities that have oversight over us it helps us to do the appropriate reporting and provide the information that they need in order for them to continue to have some confidence that we are operating safely, and we can provide that reliable service. Next slide.

So how do we use it? I think probably the best way would be to give you some examples of how we've been using our plan. Casco Bay Lines has been very fortunate that over the years we've not had a big turnover in our staff and people come and work for us for long period of time which is good. It allows us to rely on their experience and familiarity with the operation. As with all things you are going to get changes in staff and things will be different. So one examples we have a new maintenance manager that came on board a little over a year ago and this person even though he was trained really did not have ferry service experience and didn't have the experience that was necessary for the things that we did. He had marine training and stuff and worked in the ocean on marine vessels, but really was going to have a hard time coming up to speed on where we were with our assets and their condition. By using our plan we were able to help educate this new maintenance manager. He was able to look at the plan and see what we had for assets, to see the condition they were in, to see what was coming up for potential needs in terms of replacement or repair and overhauls. And also then allowed him to start to prioritize how we used his staff and how to prioritize their work efforts in trying to keep things moving forward. And then because of the Coast Guard requirements and our certification, we have to dry dock our vessels every two years and while we have them in dry dock that's when we try to focus our attention on major work items that we wouldn't normally do while we are under

operation. So this helped him to be able to prioritize the things that should be in some of those work elements as we were getting ready to dry dock the vessels this last year. Next slide. Next example would be -- hang on this slide. Go back.

The other example is our board members. I mentioned to you before that we could have at least three members changing out maybe even four in any given year. When that happens and when new people come on, they have new priorities, they have new vision they would like to share and they tend to want to sometimes head us in a different direction. We are able to use the plan to help educate board members and to let them see those things that are necessary, and we are not opposed to new direction and new visions because it's good for growth within the organization, but at the same time, we need to maintain what we are doing. In order to do that we can't lose focus on what's important and what those asset needs are going to be. We use this to help in the training and educating our board members as they come on board. Along with these things we also like I said we use it for our short-range and long-range planning. It's really easy when you have more things to do then funding to do it with to really sometimes focus in on the easy things, but by using our plan we can focus on the things that are probably most important rather than what we would consider maybe the low hanging fruit. Next slide, please.

So up to this point Casco Bay Lines has been a paper logs and paper record kind of company. We have kept track of all of our activities and relied on the experience of the people we had and the paper records we kept and the logs. Even working with the Coast Guard we would go back and pull-out logs whether a vessel log or maintenance log or whatever was necessary. The TAM plan gave us a place now to capture all of this data and retrieve it not only by staff but by those who might want to know exactly where we stand with any particular vessel or components of a vessel. So due to the Coast Guard requirements for us to drydock every two years, this became extremely important so we could focus on the right things to maintain and keep our certificates of inspection. Without these we are not allowed to operate. It's during this time that it's most effective to look at the major replacements and overhauls that need to be done and the TAM plan helps us to identify those things and put them in our contract and make sure they are accomplished when the drydock period is in progress. We also found that for the convenience of having the plan led us to want to go to an automated system with our new manager coming on board and looking at the plan of the stuff we've already gathered it was suggested we should adopt a PM software system, which would give us some electronic records and the ability to track and schedule tasks electronically and automatically. It also lets you track and see what the condition is, and we could tie it partially to our financial system. Next slide, please.

So we operate in an extremely harsh environment and based on our work efforts and the experience of the staff and the things that have taken place over time, we built into our TAM plan the reaction we get on certain equipment with this harsh environment. We were able to somewhat predict failures before they occur because the last thing, we want to do especially with many of the features we have if they break down, we have to tie the vessel up. We don't want the breakdowns. We would rather replace

something before it breaks down in order to maintain the Coast Guard compliance and keep our certifications. So we have built those into our TAM plan and that's why we broke our asset or the major asset down into a lot of sub assets within the boat and some are not very expensive ticket items, but they are very required in order for us to operate. A good example of this would be our radars or any of our electronic controls or radios. We can't leave the dock if they are not operational. These pieces of equipment, they don't seem to care how many hours they operate as much as the amount of time they have been in this environment so our TAM plan doesn't just look at hours that look sometimes at length of time depending on what that piece of equipment is, but that is what has made it a valuable tool for us that we can avoid having to deal with a crisis. Next slide, please.

So how do we integrate it? I was explaining to you just a moment ago about our preventative maintenance system and the software system and how we utilize it. The system helps us to track many of the things that are important and that are in our in our TAM plan. And it was pursued based on that value and even when we brought the PM software provider onboard, we shared with them our TAM plan which gave him -- them valuable information to build this system for us. We are still in the early stages of trying to utilize this system, so it is still new to us, but it helps to identify tasks and make staff assignments, track work progress or what's been completed or where it is in the progress. It gives us some accountability with the financial system and also helps to establish future maintenance activities and intervals. And it allows us to preschedule them way out. And it keeps electronic records, and we can tie it back and we use it to tie it back into our TAM plan. Next slide.

So the TAM plan helps us to capture a variety of things especially the capital cost. If you are in our plan you are going to see the asset, the year it needs to be replaced and then it has an estimated replacement cost. This is so that when we are planning, and we know what we might have for funding we are able to try to maximize the number of things that need to be done or it may tell us we need to seek additional funding for a particular activity if we want to avoid some sort of crisis management. Excuse me. So we use it to capture capital cost, we use it to help plan our future budgets and funding allocations. We also use it to assist us in the development of the PM software system as I was explaining. We use the data to assist us in yearly reporting to a variety of agencies whether it's the NTD or to the Coast Guard or what we may have to report just to our own board and keeping our board satisfied. And eventually, we hope to be able to tie our TAM plan in with our PM software plan so that the two-work hand in hand and one can populate the other.

My last slide, please.

So the TAM plan works for us. We've been able to maintain good momentum as it works. Our plan is still a work in progress and probably always will be a work in progress. It always needs to be massaged; it needs to be looked at. But our plan is a tool for tracking. It's a way to prioritize our work. It's a means of educating, we found that to be very valuable over this last year especially. And it's a way to maintain a

good state of readiness. It helps us to avoid breakdowns in dealing with the crisis. I can tell you right now when you've got hundreds of people living on an island or thousands of people living on an island if your vessel breaks down and you are not able to get them what they need or get them on or off the island it's not a good day for anybody involved. So we make our TAM plan work for us. Hopefully you can make your TAM plan work for you. And thank you for giving us your time.

>>Eric Papetti:

Thank you, Paul and thank you, Lou for those excellent presentations. We now have about 15 minutes left to take a few questions. We will be joined now by Hank Berg as well the General Manager at Casco Bay Lines. If you would like to ask a question, please just type it into the Q&A box and we will review it and publish those as we have time to get to. The first question we have, this one would be directed at both of you. Maybe I will direct it to you first Paul and then maybe switch to Lou. They say I am tasked with updating our TAM plan annually. Once it is complete, I have a hard time getting my colleagues and procurement, maintenance, et cetera, to actually refer to the plan and use it. Do you have any suggestions?

>>Paul Pottle:

Without knowing your colleagues I'm not sure I could probably answer that adequately. I know for us as we were developing the plan it wasn't developed by just me or one person. We are a small organization, and everybody wears multiple hats in our organization, but in order to have buy-in sometimes it's nice to have people that have some activity in the development of that plan because that they helped put it together, they will probably want to use it to see the fruits of their labor. So I work closely with the existing maintenance manager at the time when we did it, as well as our Operations Manager and the General Manager and our Financial Manager so all of the key people that could benefit from the plan were involved in part of the process and then once we had the plan in place, we had certain people buy into it and they signed off on the document. Those people that I just mentioned as well as our Board President and Board Treasurer so that everybody was involved, engaged and felt part of the process and I think that helped them want us to succeed and use the plan in an appropriate way. And we have.

>>Lou Cripps:

I'm just going to really follow Paul's lead there. I think it is really important that we have coordination in the development of the plan. It has to be our plan; it has to be their plan. So we do that through -- we have this asset management working group so that is kind of the stewards of the owners of all the different asset classes. We do these monthly meetings and a quarterly report out to the board and one to our asset management accountability team. So that allows us kind of this consistency in messaging and communication that reminds everybody that we have coordinated activities that produce a prioritized list and that everyone understands how those lists were prioritized because within each asset class they prioritize their list then we come together as the asset management working group and then we prioritize across the groups and that output goes to [inaudible]. So everyone kind of feels like their voice

was heard and their concerns and their challenges were understood and that we always have winners and losers because we talked about it like the resources don't match the need but everyone sees how it was developed and our finance group really backs that up because they say if there is a project that's a renewal or replacement it comes through the AMP and that's the method for that to happen and since that process has really been formalized everyone is on board otherwise you just get another kind of silo of excellence. You get an asset management team that's producing something putting it on the shelf and everybody looks at it and no one uses it so that's my 2 cents on that. It's a challenge.

>>Eric Papetti:

Thank you, Lou. That silo of excellence is a great term of phrase I will have to remember. The next question we have is specifically directed at Casco Bay. How do you expect the addition of a hybrid electric theory to impact the asset management maintenance and purchasing programs that you have? Will it be a big change or easy to roll into the current system?

>>Paul Pottle:

I'll take a stab at it because until we bring that asset online we may have to make some adjustments but I think the way our plan is set up and the way we even look at this new hybrid ferry is its going to fall right into the plan just the way we have it because there will be some new pages and new focuses and there are some things we won't have the experience with that will take some time and that's why the plan is always a working plan and not just a document that says this is hard and fast rule. We may have to make adjustments over time. And then we will tie it in also with our PM software system. That provider has already been made aware and they will be ready for it and the team we are working with will also be performing some monitoring and activities for us that I think will help us as we move forward with making sure that we are able to look at it and apply it to our TAM plan, apply it to our PM software and try to avoid any breakdowns before they occur.

>>Lou Cripps:

Thank you, Paul. The next question is directed specifically at RTD. Lou, we noted you have this annual process for updating your TAM plan and the question from Sharon Okoy is did you develop a formal process for this in order to update your TAM plan on this annual basis.

>>Lou Cripps:

We did, it's part of our midterm financial plan we do a six-year rolling investment plan for the organization and so our TAMP is synced up with that so we are always adding that sixth year. That way and we are coordinating those activities and sliding everything in place, and we do, we just follow our process. It is really not all that exciting. It's kind of how we think it should be.

>>Eric Papetti:

Thanks Lou. We have two more questions here. I'm going to combine them. We

have a couple of people asking each of you all about your project management software that you are using. They're curious what software you are using if it is integrated into your TAM plan process and specifically for Paul, the question was how long did it take you to move from paper to a digital process using some kind of software. So maybe we could start with Paul.

>>Paul Pottle:

Okay, well, the PM software is a preventative maintenance software as a system and so we went through an RFP process to bring on a firm that provides this and we look for those that specialize in our type of environment, a marine environment, working with various and the type of assets we have. And we are still in the process of integrating that, right, now but the actual efforts to get the first rollout of our first vessel took three to four weeks using our TAM plan and some on-site visits and working with our maintenance manager and staff and right now we are going through various training trials before we make it go fully life. But at this point, they have most of our assets in the PM software system and we only started this back about three and a half months ago, so it is fitting for the big change we are going through it's a pretty rapid process in terms of project management software. We don't have a project management software system so a lot of that, right, now is still dependent on our experience and that lies with me and that may be something we tackle before I hang up my working hat here at Casco Bay Lines, so hopefully that answers the question.

>>Lou Cripps:

We are pretty tool agnostic here at RTD. So kind of my general caution for everybody's you don't want to automate an immature process so it's really key to understand or have a thorough understanding of what it is your business is doing and what it is you want to come out of this black box. So we do use a work order management tool we've had for a number of years actually since 2007 we used Trapeze EAM it's just work orders, digital and we have some other Microsoft business intelligence kind of tools and we kind of pull everything into a data warehouse so that we can use that, but actually a lot of our AMP and some of those other things we find having an output into something people are really familiar with into something like Excel is helpful, but there is so much more than just this plan or a tool and you really have to understand -- I think we are too quick to look to tools for the answer and you can't buy your way out of this. It is just tough. It actually requires people to be thinking and working with these things. I think it is too easy to believe that there is some tool that you just buy, and it will solve all of our problems. It's the culture of the industry right now that you can just buy a tool that says asset management and the title and somehow that will deliver it for us, and I do not see that. All of our tools are good, but we could do the same thing with any tools.

>>Eric Papetti:

Thank you. So before we wrap up, I just wanted to mention to everyone that the slides here are available on the TAM webpage, but they're being updated. There was an error with how they were posted earlier. It's now been corrected, but it may not update for another 30 minutes or so if you would like to download this presentation please go

to the TAM webpage and you will find them there. This presentation will be recorded and available online within a couple of weeks as well. So with that I would like to say a big thank you for our presenters and just give you all a quick 30 seconds or one minute each for anything you would like to say to wrap up perhaps starting with Paul.

>>Paul Pottle:

Yeah, about the only thing I can say is that hopefully you can get people not to treat your TAM plan as a requirement and treat it more as something that can help you out. If you can do that you can then focus on what your true needs are then make the plan work for you. It is one thing to check the boxes and to do the things they tell you that you have to do but if it doesn't work for you, then you haven't really gained a whole lot. So we made our plan, we adapted it to fit our needs. We are unique. I tried to explain that to you and we make the plan worked for us and I think if you can do the same thing with your own plan. Make the plan work for you and you will find success with it. Thank you.

>>Lou Cripps:

Yeah, I certainly can't add to that. The one thing I would say is that we are sort of as agencies, and we are all in this together and we can share a lot of resources that we are all working on and these are all opportunities for us to make those connections and learn from each other. None of us have the answer. Everybody is better at something than we are so the one thing I would add to maybe what Paul said is let's learn from one another so we can all build better TAM plans, and the more people will use them, and they will deliver better results. Again, thanks to everyone for being here.

>>Eric Papetti:

Thank you all for being here. This concludes our webinar maintaining MomenTAM we look forward to seeing you at our next webinar and hopefully at our TAM roundtable this summer. Again, please check out the webpage and save the date for that. Have a great rest of the day folks. See you later.