



FTA Transit Asset Management (TAM) Program
Connecting TAM and Performance Management Webinar Transcript

Sarah Skeen: Good afternoon or good morning, depending on where you're joining us from and welcome to the webinar Connecting TAM and Performance Management, presented by the Federal Transit Administration. My name is Sarah Skeen, and I'm acting TAM Program Manager. Today's presentations are available now on the TAM website and you can access linked resources from the PDF. A recording of the webinar will also be posted as soon as it becomes available. I'd like to cover a couple of Zoom logistic items. There will be a question/answer portion after the panelists' presentation. So, please type any questions you have for the panelists in the Q&A pod available at the bottom of your screen. Please be clear about whom the question is for. Also, I'd like to make you aware that the closed captioning option is available by clicking Live Transcript at the bottom of your Zoom screen and then selecting, "Show subtitle." Before we begin the presentations, I would like to give you a brief update on current and upcoming engagement opportunities. The TAM Best Practice Review pilot recently launched. The TAM program is seeking applicants for new program focused on Best Practices for Transit Asset Management. The Best Practices Review pilot program will provide a voluntary review of TAM Plans and implementation of those plans for transit agencies and TAM Group Plan sponsors. If you're interested in participating in the TAM Best Practices Review pilot, please apply via the online form. And then you have to separately submit your TAM Plan Self-Assessment, your initial Tam Plan from 2018 and your most recent TAM Plan to myself, and my email is Sarah.Skeen@dot.gov. And it's due by December 23rd. Please note that the participating transit agencies should have the support of their accountable executive as requested documentation and interviews are expected to involve multiple departments within the agency. For more information and to apply to participate please visit the TAM Events page on the TAM website. We will also provide the link here. The TAM Program is continuing its peer program offerings with a new TAM Peer Working Group. This working group will bring together 12 to 15 participants from different transit agencies to engage virtually on TAM-related topics such as promoting the peer learning, sharing peer design resources, and collaborating on best practices. The group will meet approximately monthly for a year, beginning in early 2023. For more information and to apply to participate, please visit the TAM Events page on the TAM website, and apply by December 28th. The link for the TAM Working Group is also in the chat pod. Finally, FTA will be hosting the 14th Annual TAM Roundtable as an in-person event on Sunday July 9th, 2023 in Boston Massachusetts. The TAM Roundtable will coincide with TRB's national conference on Transportation Asset Management and it'll bring together participants from across the country who are directly involved in the management of Transit Capital Assets. The TAM Roundtable is a separate event and will require separate registration. More details will come later. So, we are about to hear from our presenters from two different transit agencies that will discuss how TAM relates to performance management. After the presenters there will be a question-and-answer opportunity. Kevin Olinger has been the Transit Bureau Chief at the New Mexico Department of Transportation for the past five years. Prior to joining the New Mexico DOT, he spent 15 years as the Deputy Director at the Transportation Division at the New York City Department of City Planning. 2022 marks his 30th year in transportation planning. He has a bachelor's degree in City Planning from the University of Virginia and a master's of City Planning from Georgia Tech. In his spare time, he loves to travel and is slowly learning Brazilian Portuguese. Tina Ignat has 25 years of experience as a transit professional with progressive employment within operations and administration. She is a Manager of the



TAM Program for the third largest commuter rail agency in the U.S., Metra, where she has led the agency in asset management efforts since 2015. Tina has served as committee member on APTA's [ph?] SRG-- SGR, sorry, I always get them mixed up-- and TAM Working Group since 2018. She has a bachelor's in Fine Arts from the Illinois Institute of Art, Certification from Applied Project Management from Northwestern University, and Certification from the Institute of Asset Management. In her free time, she enjoys traveling with her friends, bike riding, and learning new things. I will now turn the webinar over to Kevin.

Kevin Olinger: Hi, good, hello everyone, and thank you for this opportunity. Today I want to talk a little bit about my experience with Transit Asset Management. The first time that the TAM Plans were due, I did not use the FTA TAMPLATE. This past update, I did, and it revealed to me some challenges in navigating between using, I guess, two different data sources. Next slide, please. So, just a little bit about New Mexico. We are the fifth largest state geographically. We also have a fairly high poverty rate and a very low population density rate. As far as climate and topology, we've got it all. Mountains, dessert, prairie, and the reason that I wanted to call all this out is because when we procure vehicles, we typically go above and beyond the default technical specs that the vendors offer. You know, we want the most powerful air-conditioner, we want the most powerful heater, we want the liquid spring suspension. And so, as a result of a) we don't have a lot of money to go around; b) we are kind of building out the vehicles ahead of time, we really want to make sure that our useful life benchmarks are a little bit longer or a little bit more stringent than the FTA defaults. Next slide, please. So, we are the-- I'll get to this in a moment, but I just wanted to highlight that for the rural public transportation, we have 21 subrecipients, they serve 29 of our 33 counties. We had about 1.5 million passenger trips in 2018. That was the last pre-COVID year and in Federal Fiscal Year '22, we were averaging about five miles a trip for our rural agencies. Next slide, please. And the reason that I focused on the rural is that we are here at NMDOT the Group Tier II Plan sponsor, which includes most of our rural subrecipients. It includes 18 of the 21. We are-- those subrecipients encompass about a little over 450 revenue vehicles and as I mentioned before this was our first time using the FTA TAMPLATE. So, we'll talk a little bit now about what the challenges are with that. Next slide. So, you know, as you're doing your TAM Plan the things that are really, really important to have as accurate as possible are your Useful Life Benchmarks. We have those in our New Mexico State Management Plan. There are also the FTA defaults, and I'm going to talk a little bit more about that in a moment, and then, of course, your vehicle inventory needs to be as accurate and up to date as possible. And again, we have two sources for that. We have our New Mexico Electronic Grants Management System. It's BlackCat through Panther International. Some of you may be familiar with. And then there's also the vehicle inventory that is in the National Transit Database. So, next slide, please. So, here I just wanted to compare the table on the left is the Useful Life Benchmarks Disposition Criteria from our State Management Plan. This is adapted from FTA Circular C5300.1, which is the State of Good Repair grants program guidance. You'll see that our years and mileage differ a little. You know, like I said, we're a little more stringent than the FTA circular. And then on the right we have the National Transit Database default vehicle types and default ULBs. So, as you look at these two tables, you know, if I have a vehicle, what



piece of data do I have that applies to both of these tables, so that I can translate from one to the other? And the answer is not a lot. So, if you could go to the next slide, please? So, we have two slightly different databases and the records don't always match one to one. For example, NTD assigns one RVI ID to all the vehicles in the same fleet. So, how do I know that my NTD fleet vehicle is the one that has 125,000 miles on it versus 119 or something like that? And then, you know, a little bit what we learned as we went through this is that even though there are fields common to records in both databases, we weren't doing a great job of filling those out. So, for example, the RVI ID is not really something that we were consistent about entering in our-- in BlackCat in our Electronic Grants Management System. And the Agency ID was not something that we were really great about putting in NTD. So, that made those kind of record matching issues a little more challenging. Next slide, please. So, it's really just as we did this last update of the TAM Plan, there was some detective work that we had to do. The first step was to go through our vehicle inventory data, using our Grant Management System and looking at some information that we typically did have in both databases, including the manufacturer year, the make and model, and the seating capacity. So, we asked our subrecipients to kind of go through and we gave them spreadsheets of their NTD data in this case, and we said, "Can you please take a look at this and update these fields?" And then the second step is really to come up with, "What is the right ULB for each vehicle?" And so, the table in our State Management Plan was really based on gross vehicle weight, and the original purchase price. So, it was really important for us to make sure that we had those two pieces of data. So, once we were able to determine which vehicle, which Useful Life Benchmarks apply to which vehicle, I've already warned my NTD Analysts-- we're a little different in New Mexico, I think-- we are on the Federal Fiscal Year, so my NTD reporting isn't due until the end of January. And I've already given my analyst a heads-up that my NTD vehicle inventory is going to see some pretty significant edits, because I need to manually update all of those age Useful Life Benchmarks to what's in our State Management Plan. Next slide, please. And so, really, I guess, I've been using the Narrative Report as a way to kind of document and describe some of these issues. As I mentioned, our Useful Life Benchmarks are always going to be different from the NTD defaults. So, I can change that manually for age, but for mileage, that's not really possible. So, it's just in the Narrative Report I like to list what my Useful Life Benchmarks I'm using as I review performance. And the result of that is that your performance results using your own data are probably not going to match your NTD outputs. We found that the mileage is a real issue here. We may have vehicles that look like they're, yeah, so if a vehicle has more mileage, but not the years in NTD then it's eligible for replacement. But it's not-- NTD may not be capturing that as accurately as it could. And then any investment policies that you have, for example, here in New Mexico we also allow for subjective vehicle condition assessments in case a vehicle is just wear and tear, you know, a lemon, we can make those decisions to allow a replacement for that vehicle without-- you know, there's specific cases where Useful Life Benchmarks don't apply. And as a policy, we favor revenue vehicles over facilities. So, if we have to pick one, we're going to go with providing new revenue vehicles for our subrecipients even though the facility might be in a little worse condition. And also, finally just any external factors that are going to affect our ability to replace or maintain the assets. I know that everyone is familiar with the lag times for delivery of cutaway busses and the price increases. And so, the other challenge is just because



I have a vehicle that's eligible for replacement doesn't mean that that vehicle is going to be actually replaced any time soon. Next slide, please. All right, that's it for me. And again, I thank you for your time and I look forward to answering any questions that you might have.

Sarah Skeen: Thank you, Kevin. I would like to remind everyone that there will be a Q&A session after both presenters and you don't have to wait to submit your questions into the Q&A pod at the bottom of your screen. So, I'd like to turn the time over to Tina.

Tina Ignat: Thank you, Sarah. Hi, everyone, my name is Tina Ignat, I'm the Manager of the TAM Program at Metra Commuter Rail. And I'd like to thank the FTA for inviting me to speak on this series. This opportunity definitely allows me to reflect on TAM activities at the agency and of course make new friends, like Kevin. So, I'm going to go over the objective with all of you, provide context on the agency, speak about our Fleet Maintenance program and our Federal Reporting of those assets on the A35. And also touch on the Improvement Program here at the agency. Next slide, please. So, when I received the email a few months ago asking if I'd be interested in speaking, the question was posed of, "Do I want to speak on fleet?" and I specifically asked if it was okay to speak about the rubber tire fleet or the equipment category, since I felt that that category hasn't had a voice. So, I got a "Yes" and here we are. So, I'm going to be talking about kind of all of the bullet points of the request, which includes the strategy or process for modifying the ULB. What is being tracked as far as attributes, so we're tracking age and mileage. I'll talk about condition assessments and what that means around the fleet. And then a little bit about NTD reporting and developing those performance targets. Next slide, please. All right. So, it's important to see the depth and breadth of the agency's coverage here. So, we have service area of Northeast Illinois, which covers 3,700 square miles over a six-county region. So, all of those rubber tire fleet vehicles have to travel all the lines that we operate. So, we have 11 lines that we either owned directly or operate service on. Ten of them are diesel lines and then one is fully electric. So, we have a lot of assets. And that we have to touch on. And the rubber tire fleet is critical in ensuring that we're able to meet our objectives including facility condition assessments and all the maintenance and operations and bridge assessments and grade crossings and testing and all that. So, you can see here we have 242 stations, almost 1,200 miles of track to inspect. A variety of locomotives, coach cars, the EMUs [ph?], over 900 bridges. And almost 600 grade crossings and 24 rail yards. So, and then that electric line has substations that we have to maintain and three electrical tie stations. As far as our ridership, we're currently transitioning to more service on all of our lines. Our recovery right now is at about 40 percent during the week of pre-COVID numbers. We were moving about 280,000 daily riders. And then on weekends, we're at 80 percent recovery. Next slide, please. So, a little bit more about the history of the agency. We were formed about 40 years ago. All the different lines were run by freight railroads. They also had commuter rail service. That commuter rail service was not a priority for them. And so, since they were kind of wanting to drop that, the State of Illinois stepped in and basically formed Metra as we know it. So, Metra works side-by-side with two other service boards, Pace and CTA. And then there's oversight by the RTA and CMAP [ph?] which is our MPOs. And we all work collaboratively to deliver TAM initiatives



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as well as reviewing our performance measures and targets. Next slide, please. All right, so these are the asset categories that are required for us to be in our TAM Plans to report on for Federal reporting. So, I just wanted to really be clear that I'm going to be talking about the Equipment. And this is all the non-revenue service vehicles and equipment and there's some pictures here to illustrate what those look like. Next slide, please. Okay, so a breakdown of the vehicles is being shown here. So, we have vehicles that are primarily supporting the engineering, operations, maintenance, and capital crews that maintain all of the track, signals, the facilities, the passenger stations, the bridges, the traction power. There's also a pool of supervisory vehicles and vehicles that are used to kind of check out for various activities by personnel like myself, who needs to go out in the field from time-to-time. The trucks, which is the bulk of the fleet, consists of large, medium, or small trucks that may be outfitted with high-rail gear and/or cranes. It's almost 60 percent of the fleet. The other vehicles consist of SUVs and vans. And we are transitioning to more hybrid SUVs. And then the maintenance on these vehicles is actually outsourced. The work is done outside of the agency, but it's tracked within the Team Care Fleet Management Team here in Maximo, which is our computerized Maintenance Management System, or EAM. Next slide, please. All right, so this table is directly out of our agency's 2021 NTT Narrative Report. And it reflects the performance measures and targets across all the asset classes and I'm going to be focusing on the equipment, so got a little glimpse there of what that looks like for the agency, so next slide, please. All right, so this section here is highlighting not only the fleet, the rubber tire fleet, but also there's a little bit of an overlap with our construction equipment, so that's why you're seeing that 14-year ULB there. So, I'll be talking about the group that's under the Fleet Maintenance Group, so a few years ago, it was in 2016 actually, the year that the regulation came out, the Fleet Manager kind of took it-- took some data that he was reviewing and recognized that after about five to six years it's becoming too costly to maintain the vehicles. So, he decided to develop a policy of when he wants to replace the vehicles. So, that's why we have a seven-year ULB. And I'm going to talk a little bit more about that on the following slide. So, with that policy that he developed he basically took the age to modify it because of the maintenance that was accruing and he develop the policy. And then a few years later, we had to start Federal reporting. So, as an agency, we actually memorialized this in a memo to the FTA. Although that's not necessary to do, the A35 is a pre-form and you can change the ULB as it's a free text field, I believe. I didn't know that at the time, but we-- you know, it's good to have documentation, nevertheless. So, in our memo we basically explained the logic. We explained the operating environment, the extreme weather that occurs in this region and how we wanted to modify it to seven years. And so, you see some of the documentation here. Next slide, please. All right, so this is showing a little bit of the data that's involved and what kind of went into the process of completing the A35. So, we get a download from the Maximo system. It's formatted to be populated into the A35. We roll it up by model year and manufacturer, and then in the Notes section, we reference the vehicle number so that we know which vehicles are being rolled up together. Next slide, please. So, this is a screenshot out of System of Record, which is Maximo, and after that first year of Federal reporting, I approached the Manager of Fleet and I worked with the Maximo administrator and I asked if it's possible to develop this NTD field so that the ID can be populated and that we can easily reconcile between what's reported for Federal reporting and what is kept in the System of Record. So,



they were very helpful and really has made Federal reporting a lot easier than initially here. And just to further explain that as part of onboarding new assets, you know, the purchase data is tracked, the ULB is assigned, and then a report is generated periodically with replacement projections. But of course, just by having some proactive approach to replacements, funding and vehicles are not always available to keep up. So, as you saw with the performance, we have about 30 percent of the fleet that is beyond ULB. And so far 2022 is actually proving challenging in getting replacements and it's mostly due to manufacturer delays. So, I already know that the performance may or may not be met. But in general, we as an agency our approach to setting targets has been to follow the mandate and to consider all available sources when developing those targets. Next slide, please. So, for initial TAM Plan 2018 to 2022 the agency committed to developing condition rating skill methodologies for each of our asset classes so that we can better inform the investment prioritization process but also it's a double-edge sword, it would work also for the different business units to be aware of condition. So, we're currently working on that and we'll probably be finished first quarter of 2023. So, in the meantime, age is still being used as a proxy for condition. As far as the next TAM Plan that we've updated for 2022 to 2026, we're committing to kind of expanding our EAM and implementing that at an enterprise level. And that's driven by not only the asset management mandate but just have like really stretched the excitement for it, so there's leadership, managers, and those are directly involved with delivering TAM Initiatives that are involved and so we're really looking forward to the next four years' implementation plan. Next slide, please. So, here's all my contact information. I really appreciate having the opportunity to speak. I welcome any questions, and of course, I'd be remiss to not mention Dave Mason, who really helped provide the information for me to be the voice, not only for the assets but also for his group. So, I have his contact information there as well. Thank you.

Sarah Skeen: Thank you, Tina, for your presentation. So, we are now going to move into our question-and-answer portion. And I'd like to remind you that you can submit your question through the Q&A pod at the bottom of your screen. And we have two questions so far. So, I will start with the first one is it's to both of you. "Do you have any guidance on vehicle condition assessment for electric vehicles?" And it says, "We have a good grasp on regular vehicle condition assessment, however, we have only one agency that has all electric busses and we need help or guidance on how to assess the condition of specifically electric vehicles."

Kevin Olinger: This is Kevin. Unfortunately, I do not have any experience with that. We are about a year away I think from a couple of our subrecipients deploying electric vehicles and so I think that we're also looking for those answers.

Tina Ignat: Hi, I wish I did. I don't have that information at this time. But I'm willing to share the condition rating scale guidelines that we can-- that we're developing for the first quarter so you can see. Because we do have some hybrid rubber tire fleet.



Sarah Skeen: Okay, and then the second question we got is, "Tina, is Metra performing condition assessments on service vehicles or just using the age to determine if the vehicle is in or out of State of Good Repair?"

Tina Ignat: At this time, it's just the age, and we hope to mature to be doing a more comprehensive assessment.

Sarah Skeen: And then so Randi Miller [ph?], who asked the first question, has said she would like to see your information, Tina. So, we'll work with you to get that information to her.

Tina Ignat: Sounds good.

Sarah Skeen: And then, can you talk about ULBs for service vehicles for track service, like steel-wheel service vehicles? That's from Randy Lum-- Lamb [ph?], sorry.

Tina Ignat: Hi, Randy. We are just using the defaults which is 25 years. I'll speak very high-level. So, our steel-wheeled equipment is not used actively on a daily basis. We have construction work that occurs mostly spring, summer, fall, and then they kind of go in hibernation in the winter months when they are worked on. So, they kind of have-- I'm going to-- it's kind of like they just have a different operating environment than the rubber-tire fleet. So, we're using the defaults for those. Hopefully, that answered your question.

Sarah Skeen: And then we have a question for Tina from Martin at L.A. Metro it's, "Were you able to get TAM and FTA data fields added to Metra's enterprise Asset Management System? And then, 2) are those fields locked so that only TAM staff can change the data and then, 3) what EAM system is that? I guess that they use?"

Tina Ignat: Sure, those are really good questions. So, at this time, I think it's a free text field to enter the NTD ID from the A35. I'm the only one that has access that I know of on top of Parcia [ph?], the Administrator, and the Manager. It's a small group, so there's a Manager and then he has like three Coordinators that make up the Fleet Management Group. So, it's just a-- they're just a very approachable group so it was very easy for me to work with them, to do the Federal reporting because that's kind of my job. Didn't want to burden them with that as well, because we have a variety of ways of roles and responsibilities. And as far as the System of Record, it is an IBM product. It's Maximo. And that is what the Fleet Management Group is using. There's some other groups that use it as well.

Sarah Skeen: Okay, and so then we have a follow-up question that says, "What led Metra to generate the letter to Ms. Adomi [ph?]?"



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Tina Ignat: I think it was the fact that we wrote that letter for our rolling stock to justify the rolling stock ULB change. So, we were kind of conditioned with that, so we just followed suit and then realized that it wasn't necessary to do that. But it was good for record-keeping purposes.

Sarah Skeen: Okay, and we have another question from Sharon who said, "Other than age, what other factors is Chicago considering to be tracked for condition assessments for vehicles?"

Tina Ignat: So, it's just still very early in our Asset Management journey. We are a legacy system, so we probably won't be getting too sophisticated too soon, but we will definitely be transitioning to more performance-based planning. But as of right now, these initial efforts are just age-based.

Sarah Skeen: Okay, thank you for the answer. Does any-- if anybody has any more questions, please enter them into the Q&A pod. And it looks like we have no further questions. So, I'd like to thank Tina and Kevin for your time today and effort you've spent creating your presentations and sharing your information with us. And I'd like to remind everybody to go visit the TAM website and go to the event page and look at the opportunities for the TAM Peer Working Group, and the Best Practices Review pilot that we're starting. And look into that and see if you're interested and if you are, please apply. And I'd also like to remind you that when you exit the webinar, there'll be an evaluation and we use that information to help us guide future webinars, so we'd appreciate your time. It's a short evaluation so please fill it out as you exit the webinar. And with that-- oh, sorry. We have one question that came in while I was talking. It's from Chai [ph?], it says, "How do you keep track of your facilities' condition and data? Is it Maximo?" So, I guess both, since that's not specifically to either, I guess both of you answer that question.

Kevin Olinger: Mm hm, in New Mexico, we are us-- it's part of our Panther International Software, BlackCat. Yeah.

Sarah Skeen: Yeah.

Tina Ignat: Okay, so what was the question again? Sorry.

Sarah Skeen: No, that's okay. "How do you keep track of your facilities' condition and data?"

Tina Ignat: Okay, so right now it's in an Excel spreadsheet specifically for the condition assessments.

Sarah Skeen: Okay. Well, thank you, and with that, we will conclude the webinar. Thank you again, everybody, for participating and visit our website and the link for-- there'll be a link for the recording when it becomes available. So, have a good day.

Tina Ignat: Thank you.



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Sarah Skeen: Thank you.

Kevin Olinger: Thank you all.

Tina Ignat: Bye now.

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