

TAM Webinar: Back to TAM Basics

April 27, 2023



TRANSIT ASSET MANAGEMENT

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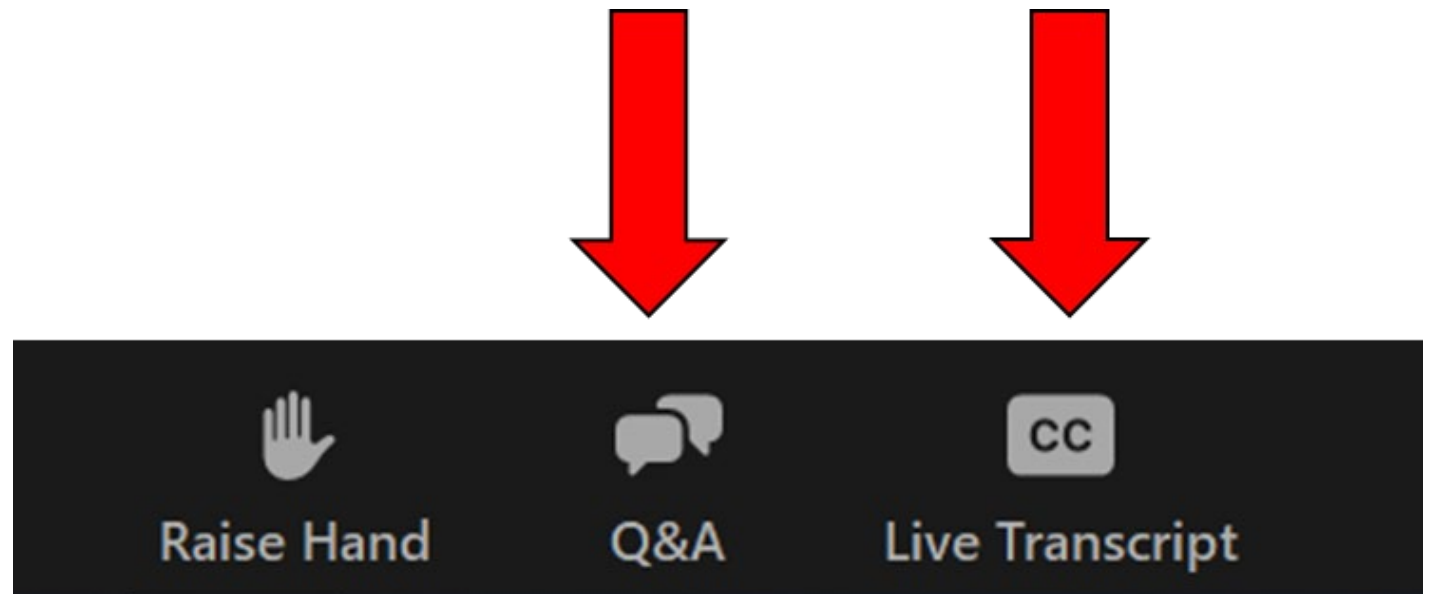
Federal Transit Administration



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2023 TAM Roundtable



**TRANSIT
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2023 FTA Transit Asset Management (TAM)
In-Person [Roundtable](#)

- July 9, 2023 in Boston, MA



NTI Training Course

Enhancing Your Transit Asset Management Program with Lifecycle
Management

[Monday, May 1, 2023—Thursday, May 4, 2023](#)

[1:00pm – 3:30pm ET](#)



Today's Agenda

Today's webinar focuses on reviewing and reiterating rule requirements, highlighting:

- Requirements for the TAM Plan
- Tools and Resources
- Questions

This webinar provides information for those new to TAM and a refresher for returning agencies.

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TAM Plan Requirements

What is Transit Asset Management (TAM)?

Transit Asset Management (TAM) is a **business model** that uses the **condition of assets** to guide the **optimal prioritization of funding** at transit properties in order to keep our transit networks in a **State of Good Repair (SGR)**.

Key Features of the TAM Rule

- Provides a foundation for addressing the estimated \$105B SGR backlog
- Focuses on measuring and monitoring performance and condition
- Minimizes the burden on smaller transit providers
- Updated TAM Plans are required every four (4) years

Applicability

- All recipients or subrecipients of Federal financial assistance under 49 U.S.C. Chapter 53 that own, operate, or manage capital assets used in the provision of public transportation
 - Includes all assets used in the provision of public transit. Not just federally funded.

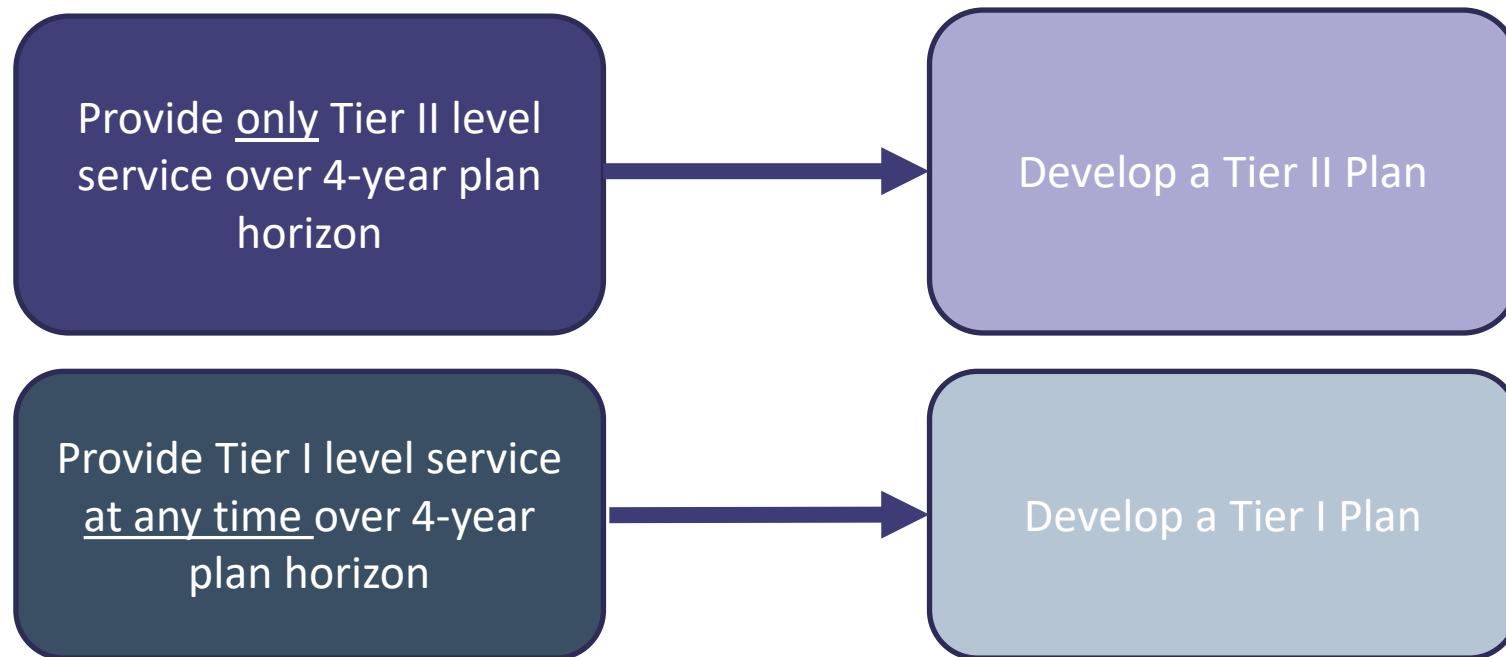
Tier I vs. Tier II Designation

Tier I	Tier II
Operates rail	Subrecipient of 5311 funds
OR	OR
≥ 101 vehicles across all fixed route modes	American Indian Tribe
OR	OR
≥ 101 vehicles in one non-fixed route mode	≤ 100 vehicles across all fixed route modes
	OR
	≤ 100 vehicles in one non-fixed route mode

Learn more about Tier designation on the [TAM FAQ website](#).

Determining Your TAM Plan Tier

- Consider the level of service that will be provided throughout the 4-year horizon of the TAM plan



TAM Plan Elements

1. Inventory of Capital Assets	All Providers (Tier I & II)
2. Condition Assessment	
3. Decision Support Tools	
4. Investment Prioritization	
5. TAM and SGR Policy	Tier I only
6. Implementation Strategy	
7. List of Key Annual Activities	
8. Identification of Resources	
9. Evaluation Plan	

Group Plans

- Group Plans are Tier II Plans and have 4 required elements
 1. Asset Inventory
 2. Condition Assessment
 3. Decision Support Tools
 4. Investment Prioritization

Typical Sponsor Agencies

State DOT

MPO

Tier I agency

Tier II direct recipient

- To determine whether your agency is required to be a sponsor, use the FTA checklist, [Am I required to be a Group TAM Plan Sponsor?](#)



National Transit Database

- Agencies will submit the Data Report and Narrative Report to the NTD
- Performance Measures and Targets
- The NTD will prefill stored information from previous years to reduce burden



NTD Data Reporting Forms

- Projected performance targets for next fiscal year (*A-90*)
 - Targets submitted in RY 2023 report, forecast RY 2024
- Asset inventory and condition assessments
 - ULBs for Rolling Stock & Equipment (service vehicles)
(*A-30 & A-35*)
 - Condition assessments for facilities (*A-15*)
 - Performance restrictions (slow zones) for infrastructure (rail fixed guideway only)(*A-20*)

Asset Inventory

- TAM Plan and NTD reporting requirements are similar, but not the same

Required TAM Plan Reporting

- Rolling Stock
- Non-revenue service vehicles
- Facilities
- Rail fixed-guideway infrastructure
- **Non-rail fixed guideway**
- **Equipment assets over \$50,000**
- **All public transit assets regardless of capital responsibility (with the exception of equipment)**

Required NTD Reporting

- Rolling Stock
- Non-revenue service vehicles
- Facilities
- Rail fixed-guideway infrastructure



TAM Performance Measures

- **Equipment** Age
 - Percentage of non-revenue service vehicles that have met or exceeded their Useful Life Benchmark (ULB)
- **Rolling Stock** Age
 - Percentage of revenue vehicles within a particular asset class that have met or exceeded their ULB
- **Infrastructure** Performance
 - Percentage of track segments with performance restrictions by class
- **Facilities** Condition
 - Percentage of facilities with a condition rating below 3.0 on the FTA Transit Economic Requirements Model (TERM) scale (1=Poor to 5=Excellent)

Recordkeeping Requirements

- Maintain records supporting TAM Plan
- Share with State and metropolitan planning organization (MPO) planning agencies
 - TAM Plan
 - Performance targets
 - Investment strategies
 - Annual condition assessments

For more information about planning requirements, visit [FTA's Transportation Planning webpage](#).

Group Plan Recordkeeping Requirements

- Group TAM plan sponsors
 - Evidence of coordination and communication with plan participants
 - Notification of approval from each participant's accountable executive
- Group TAM plan participants
 - Identify accountable executive
 - Evidence of participation in group TAM plan



Certification

- TAM Plans are approved by the Accountable Executive
 - Group Plan Sponsor is NOT group plan Accountable Executive for Participants
 - www.transit.dot.gov/TAM/TAMPlans/GroupWorkbook
- Agencies attest to following TAM requirements as part of annual Certifications and Assurances process
- FTA reviews TAM Plans during Triennial and State Management Reviews



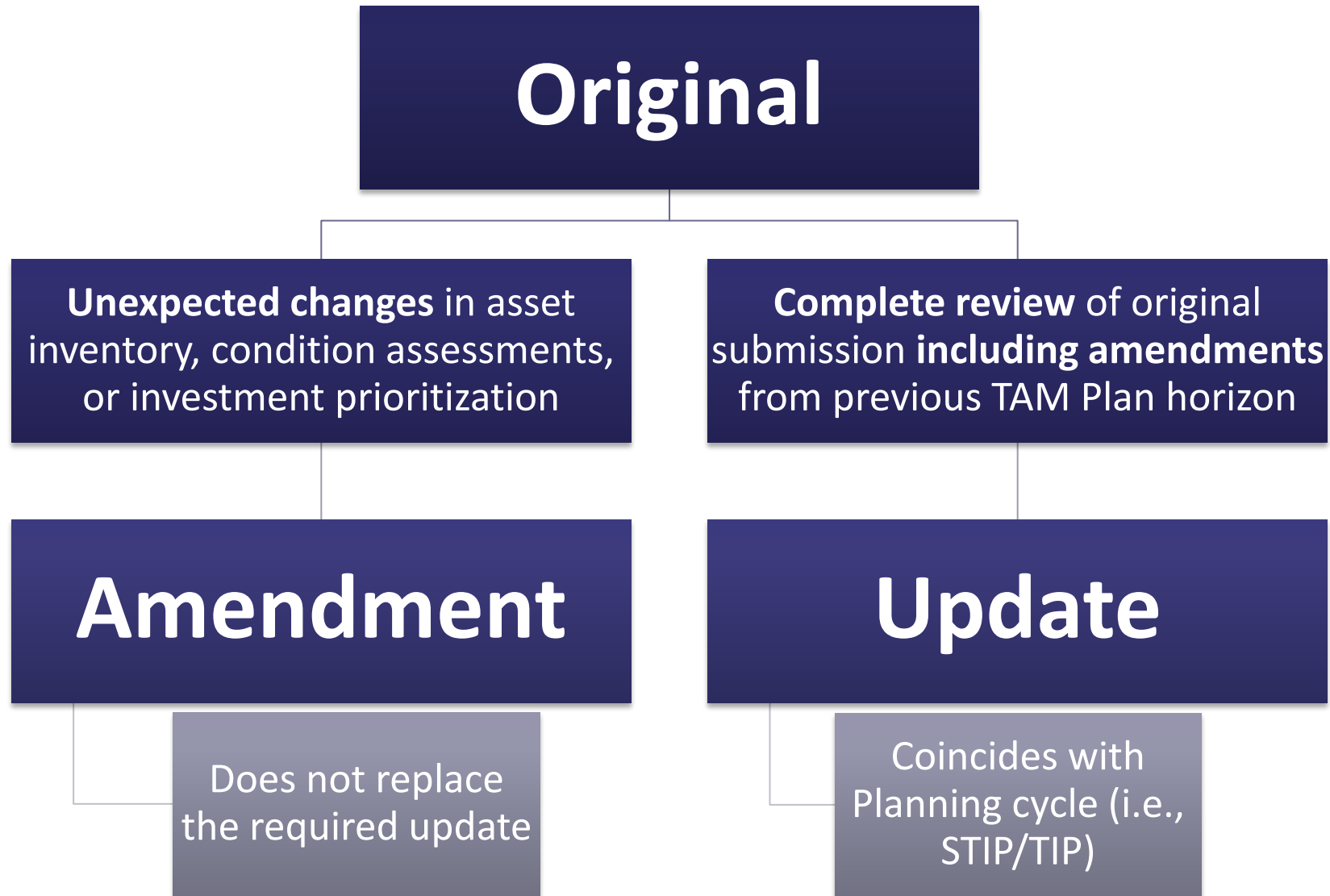
Reminders about TAM Plans

- Ensure that:
 - Appropriate tier is designated and the plan includes all required elements
 - Accountable executive is identified
 - Group plan sponsors and participants have fulfilled their respective obligations
 - TAM plans are shared with State and MPO planning agencies
 - Subrecipients are monitored properly (if applicable)
- Even though agencies do not submit their TAM Plans to FTA, it is still a requirement to update your TAM Plan. FTA reviews TAM Plans during an agency's triennial review and the data agencies update in their TAM Plans are reported annually to NTD.



How to Approach an Update

TAM Plan: Updates vs. Amendments



TAM Plan Updates

- The TAM Plan update is an opportunity to improve your process:
 - Data collection
 - Alignment with other agency and regional priorities
 - New/revised agency goals
- Consider incorporating new and updated information:
 - New investment prioritization criteria
 - New safety procedures or capital plans
 - Updated TAM or SGR policies

Tools and Resources

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Resources and Tools

 [TAM System Handbook](#)

 [TAM Plan Self-Assessment Tool](#)

 [Group Plan Sponsor Workbook](#)

 [Transit Asset Prioritization Tool](#)

 [TAM Investment Prioritization State of the Practice Synthesis](#)

 [TAM Infrastructure Performance Measure Reporting Guidebook](#)

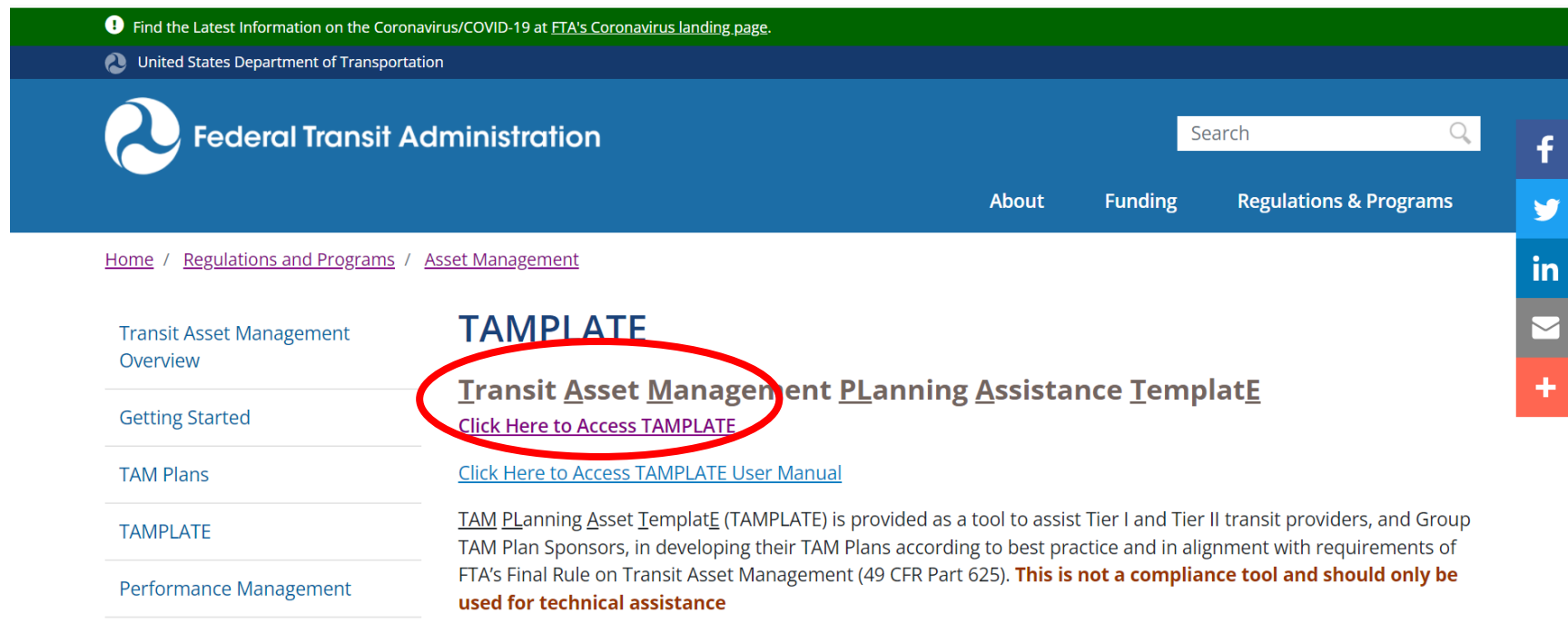
 [TAM Decision Support Tool State of the Practice Synthesis](#)

 [Facility Performance Measure Reporting Guidebook, V 1.2](#)

Visit <https://www.transit.dot.gov/TAM/TAMPlans> and <https://www.transit.dot.gov/regulations-and-guidance/asset-management/getting-started> for more information and resources.


TAMPLATE

- Designed for Tier II providers and Group Plans
- Automatically populates TAM (AIM) data from NTD



Find the Latest Information on the Coronavirus/COVID-19 at [FTA's Coronavirus landing page.](#)

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TAMPLATE

[Transit Asset Management Planning Assistance Template](#)

[Click Here to Access TAMPLATE](#)

[Click Here to Access TAMPLATE User Manual](#)

TAM Planning Asset Template (TAMPLATE) is provided as a tool to assist Tier I and Tier II transit providers, and Group TAM Plan Sponsors, in developing their TAM Plans according to best practice and in alignment with requirements of FTA's Final Rule on Transit Asset Management (49 CFR Part 625). **This is not a compliance tool and should only be used for technical assistance**

www.transit.dot.gov/regulations-and-programs/asset-management/template

When Using TAMPLATE for TAM Plan Updates

- The TAMPLATE automatically populates using the most recently published NTD data
- FTA publishes NTD data each fall, providing data for the previous year
- Agencies using the TAMPLATE may either use the most recent NTD data or manually update with more recent data
- May need to manually update asset inventories to include assets included in TAM plans but not reported to NTD
- For more information, refer to the [FAQs on the TAM website](#).

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Transit Asset Management



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TAMNews

FTA's Transit Asset Management (TAM) newsletter keeps you up to date on asset management initiatives and creates a forum for the industry to share information and learn from one another.

TAMNews

Read the latest edition of TAMNews to stay up to date on FTA's asset management initiatives.



Managing Transit Assets

Public transportation provides millions of Americans with daily access to jobs, schools, health care and essential services. Through research done to inform its 24th edition of the Conditions and Performance Report U.S. DOT has

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Transit Asset Management Resource Table

The TAM Resource Table is designed to support successful agency implementation of Transit Asset Management. This table contains resources such as FTA reports, materials from webinars and roundtables, and publications from external stakeholders. Search the inventory of available resources by keyword, author, date range, or document type. View documents by clicking on resource titles.

Agencies are encouraged to submit examples of policies, processes, tools, and other resources to TAM@dot.gov for inclusion in the table. TAM Plans are also accepted, to be featured on the [APTA Transit Asset Management](#) site.

Keywords Author

From
 January
 2000

To
 April
 2023

Document Type
 Tool

Tag
 Decision Support Tool

Title	Author	Document Type	Date
Hazard Mitigation Cost Effectiveness Tool	FTA	Tool	October 2017



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Transit Asset Management Events

What's New

- Virtual discussion forums and in-person peer exchanges will also be offered beginning in Spring 2023. Discussion forums will be standalone, virtual events for ~10 participants to present briefly and talk about a predetermined topic. Announcements will be sent to advertise these events and interested parties will be asked to submit a brief application to participate. Peer exchanges will be in-person, 1.5 day events involving a small number of agencies, and will take place onsite at one of the participating agencies. An announcement will be sent when the TAM Program begin accepting requests for peer exchanges.
- [Sign up](#) here to subscribe to receive correspondence from the TAM Program, including announcements for peer learning offerings.
- FTA will host the 14th TAM Roundtable as an in-person event on Sunday, July 9, 2023, in Boston, MA. The TAM Roundtable will coincide with TRB's National Conference on Transportation Asset Management and will 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, which will require separate registration. More details to come at a later date.

FTA and its partners have held a number of events associated with the TAM rule. Click on the headings below to find materials from specific events. Visit the [TAM Resource Table](#) for additional materials from past events.

- [Roundtables](#)
- [Peer Exchanges & Focus Groups](#)
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FTA Outreach Materials

FTA and its partners have developed a number of resources associated with the TAM rule. Click on the headings below to find specific types of materials. Visit the [TAM Resource Table](#) for a full list of available TAM resources.

- [Fact Sheets](#)
- [TAMNews](#)
- [TAM Posters](#)
- [Trainings](#)
- [Presentations](#)
- [Additional Resources](#)



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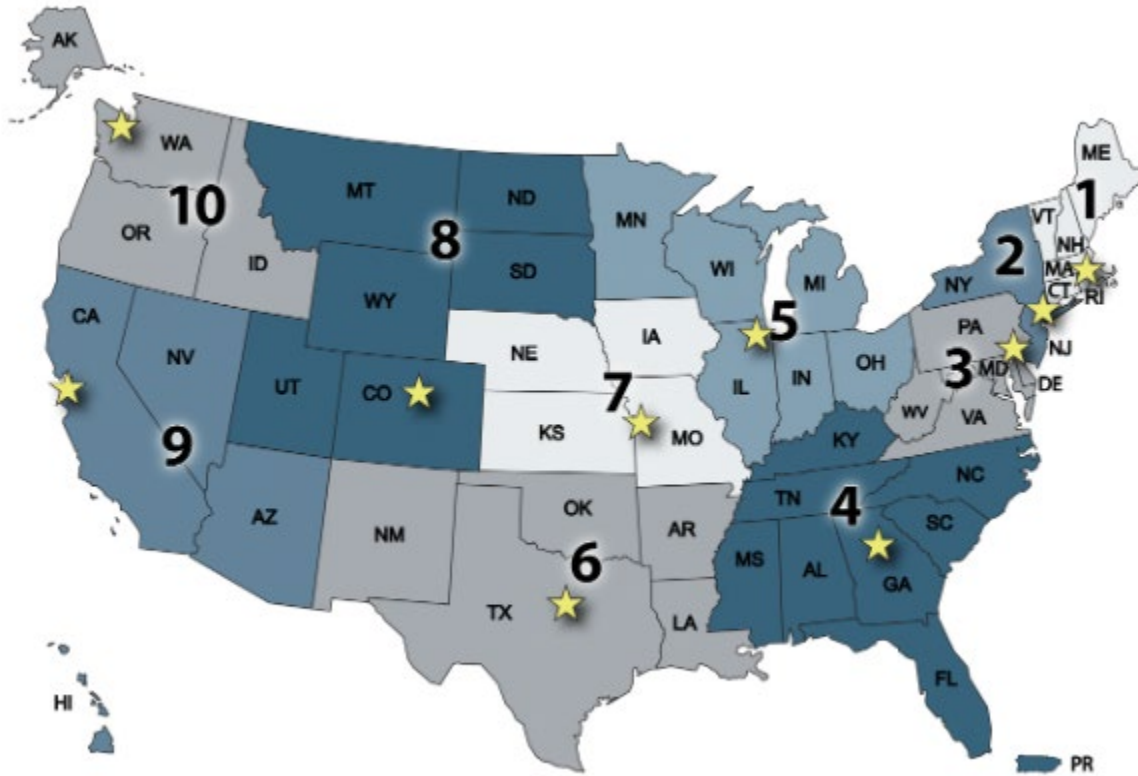
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- Programs**
 - Bus and Bus Facilities (5339)
 - Bus Testing Facilities
 - Drug & Alcohol
 - Emergency Relief Program
 - Enhanced Mobility of Seniors and Individuals with Disabilities (Section 5310)
 - Formula Grants for Rural Areas (Section 5311)
 - Workforce Development
 - Metropolitan & Statewide and Nonmetropolitan Planning
 - Research, Development, Demonstration, and Deployment Projects
 - State of Good Repair
 - Technical Assistance and Standards Development
 - Transit Asset Management
 - Transit-Oriented Development

Best Resource: TAM Contacts



Region	Name	Email
1	Chris LaMacchia	C.LaMacchia@dot.gov
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5	Lisa Joiner	Lisa.Joiner@dot.gov
6	Eddie Chavarria	Heriberto.Chavarria@dot.gov
7	Bill Kalt	William.Kalt@dot.gov
8	Ranae Tunison	Ranae.Tunison@dot.gov
9	Susan Ko	Susan.Ko@dot.gov
10	Abhishek Koirala	Abhishek.Koirala@dot.gov

Questions?

- Visit the FTA TAM website: www.transit.dot.gov/TAM
- Contact the TAM team: TAM@dot.gov
- TAM Manager: Tamalynn Kennedy, Tamalynn.Kennedy@dot.gov





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