Transit Asset Management Final Rule Information

Background
The Federal Transit Administration (FTA) Transit Asset Management Final Rule was published July 26, 2016 in the Federal Register and will become effective October 1, 2016. The final rule defines the term *state of good repair* and establishes minimum Federal requirements for transit asset management. This applies to all recipients of Federal financial assistance under 49 U.S.C. Chapter 53 who own, operate, or manage public transportation capital assets.

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

A Tiered Approach
The FTA is using a two-tiered approach to implement TAM in order to reduce TAM requirements for agencies operating smaller fleets.

Tier I agencies must develop and carry out a TAM plan which includes nine TAM elements.

A Tier I provider is a recipient who owns, operates, or manages 101 or more vehicles in revenue service during peak regular service across all fixed route modes or in any one non-fixed route mode, or who operates rail transit.

Tier II agencies will participate in a single Group TAM plan, sponsored by ODOT, which includes only the first four TAM elements.

A Tier II provider is a recipient who owns, operates, or manages 100 or fewer vehicles in revenue service during peak regular service across all non-rail fixed route modes or in any one non-fixed route mode; a subrecipient under the 5311 Rural Area Formula program; a subrecipient under the 5310 Seniors and Individuals with Disabilities program who operates an open-door service; or any American Indian tribe.

Required TAM Plan Elements

1. Inventory of Capital Assets
2. Condition Assessment
3. Decision Support Tools
4. Investment Prioritization

All Providers
Tier I & II

5. TAM and SGR Policy
6. Implementation Strategy
7. List of Key Annual Activities
8. Identification of Resources
9. Evaluation Plan

Tier I Providers Only

ODOT Rail and Public Transit TAM Activities and Timeline

January 2017

- ODOT enters group plan performance targets into the National Transit Database (NTD), this will be done annually. Using provider reported data in NTD and OPTIS ODOT performed quantitative analysis to set the performance targets for equipment and rolling stock.
- ODOT set Performance targets for:
  1. Equipment (age) - percentage of vehicles that have met or exceeded their Useful Life Benchmark
     - Automobiles   40%
  2. Rolling Stock (age) - percentage of revenue vehicles within a particular asset class that have met or exceeded their Useful Life Benchmark
     - Over the Road Bus   20%
     - Bus   40%
     - Cutaway   40%
     - Van   40%
     - Minivan   40%
     - SUV   40%
     - Automobile   40%
  3. Infrastructure (performance) – Not applicable to Tier II - percentage of track segments with performance restrictions by class
     - Not Applicable
  4. Facilities (condition) - percentage of facilities with a condition rating below 3 (using the scale 1=Poor to 5=Excellent)
     - Passenger / Parking Facilitates   10%
     - Administrative / Maintenance Facilities   10%

2017 through Spring 2018

- ODOT hires a contractor to draft a group TAM plan, in collaboration with participating agencies. Tier II and small urban agencies may participate in the group plan. The group TAM plan will cover a 4-5 year period coinciding with the Oregon STIP cycle and will be updated every 4 years, or when significant changes are made.
  - Contractor will develop lifecycle cost templates for each category of vehicle
- All transit agencies designate an "accountable executive" whom has fiscal control or responsibility for assets.

  - Transportation Maintenance Council will participle in developing "best practice templates" for all transit providers to use. Each of these templates will be adjustable to meet your agency's operations. These include:

    - Facility Maintenance Plans
    - Vehicle Maintenance Plans - one for each category of vehicle
    - Inspection forms
    - Preventive Maintenance program

Fall 2017

- ODOT will offer NTD training at the 2017 Oregon Public Transportation Conference
- Agencies enter inventory of capital assets into the NTD. This includes:
  - All vehicles owned by the agency, including non-service vehicles owned by the agency;
  - All facilities;

- o   Equipment >$ 50,000; and
- o   All 3rd party assets dedicated to the agency's service;
  - ▪   It is reportable if you are responsible to replace any part of the 3rd party asset
- 5310 open-door agencies enter all assets, 5310 agencies that provide client-only service are not required to participate. New requirement for 5310 recipients.

January 31, 2018
- ODOT reports in NTD on performance targets using the data agencies have entered into NTD. These will be reported annually, along with the current annual NTD report.

May 2018
- ODOT publishes group TAM plan and solicits for comments.

August 2018
- Group TAM plan finalized and published on ODOT's website.

Fall 2018
- Agencies report on assets in NTD, this time <u>reporting on asset condition too</u>.
- FTA reviews group TAM plan during ODOT's state management review.
- FTA reviews ODOT's state management plan.

Fall 2019
- Agencies report on assets in NTD, including narrative reports on asset condition. These reports explain changes in asset conditions and progress towards performance targets.

For more information, see FTA Transit Asset Management.
For TAM NTD reporting information, see the NTD/TAM Crosswalk

Transit Asset Management Timeline

TAM FINAL RULE RELEASED

STATE OF GOOD REPAIR PERFORMANCE TARGETS SET

ASSETS REPORTED IN NTD INCLUDING SGR PERFORMANCE TARGETS (YEARLY)

FTA STATE MANAGEMENT REVIEW INCLUDING TAM GROUP PLAN

TAM RULE EFFECTIVE

TEMPLATES POSTED FOR AGENCIES USE

| July-2016 | October-2016 | January-2017 | April-2017 | October-2017 | March-2018 | August-2018 | September-2018 | October-2019 |

COLLABORATE WITH PROVIDERS ON GROUP TAM PLAN

TAM GROUP PLAN FINALIZED

NARRATIVE REPORTS DUE