



Transit Asset Management Plan Performance Targets and Measures

The TAM Final Rule requires transit providers and group TAM plan sponsors to set State of Good Repair (SGR) performance targets and measures within three months after the effective date of the Final Rule [49 CFR § 625.45 (b)(1)]. Accordingly, transit providers and group TAM plan sponsors must set initial SGR performance targets no later than January 1, 2017.

Performance targets are expressed based on quantifiable indicator of a performance measure.

NCDOT Group TAM Plan

All agencies that are currently sub-recipients of NCDOT and considered Tier II Providers [49 CFR § 625.45] may participate in the NCDOT Group TAM Plan. Those agencies that are considered direct recipients of Federal Transit Administration funds may not participate in the NCDOT Group TAM Plan and must complete individual TAM Plans conducted internally. The Tier II providers are listed in Appendix B.

Agencies participating in the Group TAM Plan must submit the provided TAM Inventory to NCDOT via Partner Connect. This inventory must be certified by the Accountable Executive [49 CFR § 625.5] for such an agency with each claim submitted and annually before TAM Plan submission to FTA.

Tracking TAM Inventory

The NCDOT TAM Inventory is a tool created to uniformly gather data on the assets held by transit agencies. The inventory tracks asset data for the 3 asset categories: Rolling Stock, Equipment and Facilities. Collection of these accurately updated inventories will be required with every relevant asset claim requested from NCDOT. Instructions for the TAM Inventory are attached in Appendix A.

Equipment will be tracked using a database and will be updated by routinely by NCDOT beginning FY17. All other active asset categories will be assessed yearly in total before updating the TAM Plan and determining Performance Targets. Rolling Stock will be assessed using a combination of the NCDOT Vehicles Inventory database and the TAM Inventory Rolling Stock asset category. Facilities will be assessed using reported TERM Scale measures from the TAM Inventory.

Defining Performance Measures

EQUIPMENT: Percentage of equipment that have met or exceeded their Useful Life Benchmark (ULB). All tangible assets used in the provision of transportation (Replacement/Annual Rental Cost >\$100.00). All equipment shall be updated by the



Transit System with each reimbursement claim. The equipment asset category also includes any asset valued at greater than \$50,000.

ROLLING STOCK: Percentage of revenue vehicles within a particular asset class that have met or exceeded their ULB. Tracking all revenue vehicles including NCDOT funded vehicles and locally-owned vehicle assets. All rolling stock shall be updated annually.

FACILITIES: Percentage of facilities with a condition rating below 3.0 on the FTA Transit Economic Requirements Model (TERM) scale (1=Poor to 5=Excellent). Includes entire existing inventory. All facilities shall be updated by the Transit System annually.

- **TERM SCALE:** To determine median value across components. Calculate this by tabulating the number of components inspected at each condition rating, and use as the overall rating the lowest rating achieved by at least half of the components. Example: If 10 components were inspected and the results were evenly distributed between ratings (2 components with each of the 5 rating values), the overall rating would be 3, at least half of the ratings would have a value of 3 or less.

Performance Targets

EQUIPMENT: Percentage of equipment valued > \$50,000 (support/service vehicles) that have met useful life.

ROLLING STOCK: Percentage of revenue vehicles surpassing Useful Life Benchmarks (ULB) by Asset Class. The ULB for Vans= five (5) years, Light Transit Vehicle (LTV) = Seven (7) years, Bus = ten (10) years.

- 3 Asset Classes
- Assessed according to Age based on Model Year
- Benchmarks determined by Capital Replacement Plan

FACILITIES: Calculated according to percentage of facilities with a condition rating below 3.0 on the FTA Transit Economic Requirements Model (TERM) scale (1=Poor to 5=Excellent). This includes entire existing inventory. All facilities shall be updated by the Transit System with each reimbursement claim.

Summary: State of Good Repair (SGR) Performance Targets and Measures

Performance targets and measures are submitted to MPOs in January 2017. The TAM Final Rule requires transit providers and group sponsors to set State of Good Repair (SGR) performance targets within three months after the effective date of the Final Rule [49 CFR § 625.45 (b)(1)]. Accordingly, transit providers and group TAM plan sponsors must set initial SGR performance targets no later than January 1, 2017.

Appendix A

General Instructions

Transportation Asset Management Inventory (TAM): Getting Started

General Overview


This Excel workbook collects asset information for each agency. The workbook is separated into 3 worksheets organized according to FTA asset categories.

Saving the TAM Inventory File

Your first step should be to save this file to a location where it can be retrieved and updated. It is helpful to save the document with the transit system name and fiscal year in the the format "[System Name].FY17.TAM_Inventory.xlsx" Once saved, open the file and complete the form following the step-by-step instructions. It is recommended that the file be saved frequently while updating information so as not to lose data if technical difficulties with hardware or software are experienced.

Worksheet Tabs and Line Numbers

Tabs for each worksheet are located at the bottom of the Excel program screen and are labeled. Begin with the first tab "1. Rolling Stock" to select your system's name. All lines formatted in

 require a number or other information to be entered. Instructions are provided in this document for each row. A popup with directions will appear in any cell requiring a user entry.

In some lines and columns, the answer is automatically calculated or information is copied from another section in the report. These autofill lines and columns are protected and the answers cannot be changed.

Effective Date

The Effective Date of this TAM Inventory requirement is July 1st, 2016, the start of the fiscal year. Any Equipment acquired after this date should be included in this asset inventory. All agency-owned Rolling Stock and all Facilities currently used in the provision of transportation must be reported in this inventory.

How to Report

1. Rolling Stock

Report only revenue vehicles for which NCDOT does not hold the title that are used in the provision of public transportation.

*THIS INCLUDES (but is not limited to):

- Agency owned vehicles
- FTA Direct-Recipient Vehicles
- Transportation Authority owned vehicles
- 3rd Party Leased vehicles
- County owned vehicles

*DOES NOT INCLUDE:

- NCDOT leased vehicles (these are tracked separately)
- Service and Support Vehicles
- Brokered transportation vehicles
- Purchased-transportation vehicles

Appendix A

2. Equipment

-Report all capital assets used in the provision of transportation:

- With a purchase price greater than \$100 AND
- With a useful life greater than 1 year AND
- Purchased after July 1st, 2016 (start of FY17)

-Report all assets with a replacement value greater than \$50,000 regardless of purchase date.
-This includes service vehicles and support vehicles, hydraulic lifts and high-value maintenance equipment

3. Facilities

Report all facilities used in the provision of transportation, whether they are owned, leased or rented.

*THIS INCLUDES (but is not limited to):

- Rented/leased office spaces
- Parking facilities (ex. Park and Ride Lots, Garages)
- Administrative and maintenance facilities (county or agency owned)

*DOES NOT INCLUDE:

- Private service stations (ex. Joe's Garage, Jiffy Lube, Meineke)

Please use the attached TERM Scale Worksheet to assign a condition rating to facilities. Please save a copy of the TERM Scale Worksheet for each facility in your personal records.

NCDOT does not require copies of these worksheets to be submitted but they may be requested during a site visit.

Where to Send the TAM Inventory

Systems should submit the completed TAM Inventory to PTD via Partner Connect Drop Box under the category "TAM Inventory" with the proper naming convention given above.

Report Deadlines

The initial data collection deadline is December 15th, 2016. All subsequent claims after this date must be submitted with an updated copy of the TAM Inventory.



APPENDIX B

TRANSIT SYSTEMS PARTICIPAING IN GROUP PLAN

Alleghany County
Aging, Disability and Transit Services of Rockingham Co. (Inc.)
Alamance County Transportation Authority
Albemarle Regional Health Services (dba ICPTA)
Anson County
AppalCART
Ashe County Transportation Authority, Inc.
Avery County Transportation Authority
Beaufort County Developmental Center, Inc.
Bladen County
Brunswick Transit System, Inc.
Buncombe County
Cabarrus County
Carteret County
Caswell County
Chatham Transit Network (Inc.)
Cherokee County
Choanoke Public Transportation Authority
City of Wilson
Clay County
Columbus County
Community & Senior Serv. of Johnston County, Inc.
Craven County
Cumberland County
Dare County
Davidson County
Duplin County
Durham County
Eastern Band of Cherokee Indians
Gaston County
Gates County
Goldsboro-Wayne Transportation Authority
Graham County
Greene County
Guilford County
Harnett County
Hoke County
Hyde County Non-Profit Private Transportation Corp.
Iredell County
Jackson County
Kerr Area Transportation Authority
Lee County
Lenoir County
Lincoln County
Macon County
Madison County Transportation Authority
Martin County



McDowell County Transportation Planning Board, Inc.
Mecklenburg County
Mitchell County Transportation Authority
Moore County
Mountain Projects, Inc./ Haywood County
Onslow United Transit System, Inc.
Orange County
Pender Adult Services, Inc.
Person County
Pitt County
Polk County Transportation Authority
Randolph County Senior Adult Association, Inc.
Richmond Interagency Transportation, Inc.
Robeson County
Rowan County
Rutherford County
Sampson County
Scotland County
Stanly County
Swain County Focal Point on Aging, Inc.
Tar River Transit/ City of Rocky Mount
Transportation Administration of Cleveland Co., Inc.
Transylvania County
Tyrrell County
Union County
Wake County
Washington County
Western Carolina Community Action, Inc.
Western Piedmont Regional Transit Authority
Wilkes Transportation Authority
Wilson County
Yadkin Valley Economic Development District, Inc.
Yancey County Transportation Authority