Palm Tran Transit Asset Management Plan

Presentation to the TPA Governing Board

DECEMBER 13, 2018
Asset Management Journey

Baseline Assessment
Transit Asset Management Plan
Improvement Plan and Implementation Actions
Asset Management Baseline Assessment

- Assessment model mapped to global standards, industry best practice, federal requirements for asset management
- Held interviews and workshops with each part of the business to assess against eight subject areas or “pathways” for asset management success
- Highlighted areas of strength and opportunities for improvement
Baseline Assessment Performance Areas
U.S. 49 CFR 625 requires transit agencies to establish asset management practices and develop an asset management plan by October 1, 2018.

<table>
<thead>
<tr>
<th>Key TAM Requirements</th>
<th>Transit Asset Management Plan Requirements</th>
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<tbody>
<tr>
<td>Identification of the ‘Accountable Executive’ ultimately responsible for asset management practices</td>
<td>Establish an inventory of all capital assets</td>
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<tr>
<td>Establishment of TAM Performance Targets</td>
<td>Provide an assessment of asset condition</td>
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<tr>
<td>Develop a TAM Plan</td>
<td>Describe the resources and processes needed to bring or maintain assets in a state of good repair</td>
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<td>Report asset inventories, condition, and performance measures through the NTD</td>
<td>Describe the decision support tools and investment prioritization methods</td>
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<td>Also includes risk identification, assessment, and management as a requirement of agency safety plans and asset management planning</td>
<td>Identify project-based prioritization of investments</td>
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<td>Define the TAM and SGR Policy</td>
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<td>Discuss the TAM Plan implementation strategy</td>
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<td>Describe key TAM activities to be undertaken during the 4yr horizon</td>
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<td>Outline how the TAM Plan will be monitored and updated</td>
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- Completed
- In Progress
Palm Tran’s TAM Plan Approved 9-24-18

- Asset Management Policy
- Asset and Asset Management Performance
- Asset Portfolio
- Risk Management
- Asset Lifecycle Management Strategies
- Work Plans and Budget Forecasts
- Asset Management Enablers
- Continuous Improvement
Assets and Performance Summary

Summary of Palm Tran Asset Inventory

<table>
<thead>
<tr>
<th>Asset Category</th>
<th>Value</th>
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<tbody>
<tr>
<td>Rolling Stock (Revenue Vehicles)</td>
<td>$94.8M</td>
</tr>
<tr>
<td>Equipment &amp; Non-Revenue Vehicles</td>
<td>$5.3M</td>
</tr>
<tr>
<td>Facilities</td>
<td>$20M</td>
</tr>
</tbody>
</table>

FY2018 (As of June 2018) Asset Performance — Technical Levels of Service

<table>
<thead>
<tr>
<th>Asset Category</th>
<th>Target</th>
<th>Actual</th>
<th>Progression</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rolling Stock (Revenue Vehicles)</td>
<td>10%</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>Equipment &amp; Non-Revenue Vehicles</td>
<td>20%</td>
<td>26%</td>
<td>26%</td>
</tr>
<tr>
<td>Facilities</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
</tr>
</tbody>
</table>

Target and Actual figures for Rolling Stock and Equipment & Non-Revenue Vehicles are based on ULB. Target and Actual figures for Facilities are based on TERM.
FY2018-FY2022 Summary of State of Good Repair Investment Needs by Asset Class

**FY2018**
- Rolling Stock (Fixed Route): $11.8M
- Rolling Stock (Direct Route): $791K
- Equipment: $1.5M

**FY2019**
- Rolling Stock (Fixed Route): $9.4M
- Rolling Stock (Direct Route): $245K
- Equipment: $131K
- Facilities: $4.4M

**FY2020**
- Rolling Stock (Fixed Route): $15.3M
- Rolling Stock (Direct Route): $4.8M
- Facilities: $985K

**FY2021**
- Rolling Stock (Fixed Route): $17.5M
- Rolling Stock (Direct Route): $346K
- Facilities: $1.8M

**FY2022**
- Rolling Stock (Fixed Route): $9.6M
- Rolling Stock (Direct Route): $5.5M
- Facilities: $1.5M

Core Asset Management Roles & Responsibilities

- Asset Managers
- Maintenance Managers
- Capital Asset Planning
- Capital Project Delivery
- Asset Management Essential Support

- Asset Management Essential Support
  - Executive Director and Accountable Executive
  - Senior Manager of Government Affairs
  - Capital Grants
  - Director of Administrative Services
  - Manager of Performance Management
  - Procurement Manager
  - Senior Manager of Human Resources
  - Information Technology Manager
In October 2018, Palm Tran held a workshop to:

- Further develop its improvement program: 39 improvement actions/initiatives identified
- Establish roles and responsibilities

**Continuous Improvement & Next Steps**

**ASSET AND ASSET MANAGEMENT PERFORMANCE**
- 7 actions

**ASSET PORTFOLIO**
- 4 actions

**RISK MANAGEMENT**
- 4 actions

**LIFECYCLE MANAGEMENT STRATEGIES**
- 8 actions

**WORK PLANS AND BUDGET FORECASTS**
- 2 actions

**ASSET MANAGEMENT ENABLERS**
- 14 actions

TAM Plans are to be updated in their entirety at least once every 4 years, but should be updated following significant changes (e.g., major changes to asset inventory, operations).
Thank You!

For questions, please contact:

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