Today’s Agenda

• Recap of FY20 Capital and Operating Programs
• Look Ahead to FY21
  • Recommendations for Capital and Operating
  • Updates on Outreach and Special Programs
• Strategic Plans – Status
• TSDAC Next Steps
FY20 – Capital Process/Outcomes
Statewide Transit Capital Prioritization

- Effective July 1, 2019
- **State of Good Repair**
  - Based on transit asset management principles, including federal requirements for Transit Asset Management
- **Major Expansion**
  - Based on SMART SCALE factors:
    - Congestion mitigation
    - Economic development
    - Accessibility
    - Safety
    - Environmental quality
    - Land use
Scoring Methodology
State of Good Repair Projects

- Asset Condition Rating (Up to 60 points)
- Service Impact Score (Up to 40 points – 10 for each criteria)
- SGR Project Technical Score (Total: Up to 100 points)

- Age (Useful Life)
- Mileage (Vehicles Only)
- Asset condition
- Operating Efficiency
- Frequency, Travel Time and/or Reliability
- Accessibility and/or Customer Experience
- Safety and Security
State of Good Repair

- 279 Line items scored, 243 funded
- Scores range from a high of 97 to a low of 15
- Items with a score of 44 or greater recommended for funding
- Items that scored well:
  - Items exceeding useful life/mileage
  - Revenue vehicles
  - Customer facing infrastructure
  - Operational technology
- Items that did not score well:
  - Items not yet at their useful life/mileage
  - Administrative technology
Scoring Methodology: Minor Enhancement Projects

Service Impact Score
(Up to 40 points – 10 for each criteria)

- Operating Efficiency
- Frequency, Travel Time and/or Reliability
- Accessibility and/or Customer Experience
- Safety and Security

Minor Enhancement Application Technical Score
(Total: Up to 40 points possible)
Minor Enhancement Scoring

- 85 Line items scored, 75 funded
- Scores range from a high of 35 to a low of 8
- Items with a score of 15 or greater recommended for funding
- Items that scored well:
  - Expansion vehicles
  - Maintenance equipment/facilities
  - Customer facility improvements
  - Operational technology
- Items that did not score well:
  - Administrative technology
## Major Expansion Projects – Measures by Factor Area

<table>
<thead>
<tr>
<th>Factor</th>
<th>Measure</th>
<th>Measure Weight</th>
</tr>
</thead>
<tbody>
<tr>
<td>Congestion Mitigation</td>
<td>Change in peak-period transit system ridership attributed to the project</td>
<td>100%</td>
</tr>
<tr>
<td>Economic Development</td>
<td>Project consistency with regional and local economic development plans and policies, and support for local development activity</td>
<td>100%</td>
</tr>
<tr>
<td>Accessibility</td>
<td>Project improvement in accessibility to jobs and select non-work destinations</td>
<td>50%</td>
</tr>
<tr>
<td></td>
<td>Disadvantaged population (low-income, minority, or limited English proficiency) within walking distance of project</td>
<td>50%</td>
</tr>
<tr>
<td>Safety</td>
<td>Project contribution to improving safety and security, reducing risk of fatalities or injuries</td>
<td>100%</td>
</tr>
<tr>
<td>Environmental Quality</td>
<td>Reduction in daily vehicle miles traveled resulting from project</td>
<td>100%</td>
</tr>
<tr>
<td>Land Use</td>
<td>Transit supportive land use served by the project</td>
<td>100%</td>
</tr>
</tbody>
</table>
Major Expansion Scoring

- 4 Major Expansion Projects scored, all recommended for funding

<table>
<thead>
<tr>
<th>Project</th>
<th>Total Benefit Score</th>
<th>Transit Capital $</th>
<th>MERIT Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Potomac Yard Metro South Entrance</td>
<td>47.7</td>
<td>$25M</td>
<td>19.1</td>
</tr>
<tr>
<td>Crystal City Metro East Entrance</td>
<td>37.3</td>
<td>$41.4M</td>
<td>9.1</td>
</tr>
<tr>
<td>CCPY Transitway Extension</td>
<td>23.5</td>
<td>$14.6M</td>
<td>16.1</td>
</tr>
<tr>
<td>Route 1 Transitway Extension</td>
<td>17.6</td>
<td>$2.5M</td>
<td>70.5</td>
</tr>
</tbody>
</table>
Capital Program – Evaluation and Recommendations
Identification of Issues/Trends

• DRPT staff held an after action review upon completion of application scoring to identify issues, trends and areas for improvement prior to the FY21 cycle
• Generally speaking, there were fewer applications than typical/expected in FY20 (especially for major expansion projects)
• Action plan resulted in four categories of evaluation/improvements:
  • Application
  • Scoring
  • Technology
  • Outreach
State of Good Repair
Scoring Issues/Recommendations

- Scoring was time intensive – some information provided by applicants was inconsistent or incomplete, requiring manual updates and additional coordination by DRPT staff.
- Applications included a number of items without a documented ESL (FTA or DRPT), requiring additional research to support scoring.

For FY21:
- No substantive changes recommended.
- Application and guidance is being updated to walk applicants through the application process and to clarify the supporting information necessary for scoring.
- Additional data clean-up in TransAM (state asset management system) is underway with transit agencies to better support SGR scoring.
Minor Enhancement
Scoring Issues/Recommendations

• Generally, the scoring and prioritization of projects that fit the MIN program definition was straightforward and presented few workflow issues.

• There are some methodological questions/issues that come up when looking at the scoring results of the prioritization process – particularly the service impact categories and default scoring.

• For FY21:
  • No substantive changes recommended.
  • Application and guidance is being updated to walk applicants through the application process and to clarify the supporting information necessary for scoring.
Major Expansion
Scoring Issues/Recommendations

• Only 4 applications in FY20 – all for known and well documented expansion projects

• Utilized consultant support for scoring, no major issues

• For FY21:
  • No substantive changes recommended
  • More applications are expected based on capital budgets
  • Update/refine technical and application guidance to better support applicants as they develop applications for major projects
Recent Outreach Activity

Grant Workshop/Webinar Held on June 24

- 130 registrants
- FY20 Grant Administration Procedures posted on OLGA – June 21
- Webinar recording posted on webpage – June 24
Planned Outreach Activity

- Quarterly meetings with grant recipients are ongoing
- TDM applicant survey – Summer
- Transit capital applicant survey – Summer
- Electric Transit Webinar (with DEQ/Dominion) - September
- Coordinated Human Service Mobility (CHSM) Meetings – September/October
- Commuter Assistance Program/TDM Strategic Plan Guidelines Webinar – September
- Setting Goals for Commuter Assistance Programs Webinar – Fall
- **Grant Workshops** – October/November
- Try Transit Week – September 16-20
Recommendations Beyond FY21

- Continued refinement of the application with link to TransAM, online scoring
- Evaluation of SGR scoring methodology as SGR backlog decreases - should points distribution be adjusted for “just in time” arrival of replacement assets
- Evaluation of Service Impact scoring methodology – incorporation of more quantitative metrics
FY20 – Operating Process/Outcomes
Operating Assistance Allocation Methodology – FY2020

Available Operating Funds (DRPT)

Performance Based Funding

Sizing Metrics
- Operating Cost 60%
- Ridership (Pax) 20%
- Revenue Vehicle Hours (RVH) 10%
- Revenue Vehicle Miles (RVM) 10%

Performance Adjustments
- Pax/RVH 20%
- Pax/RVM 20%
- Op Cost/RVH 20%
- Op Cost/RVM 20%
- Op Cost/Pax 20%

30% Cap on Assistance

Total Operating Assistance Allocation per Agency

Commuter Rail Sizing Metric
What changed beyond the allocation methodology?

- Increase in available operating assistance by $2.5m
- Use of operating reserve to provide transition assistance, up to $3m
- Review of performance data for 2015 through 2018
- New year of data - changes in individual agency performance relative to statewide trends
What was the result?

• Most agencies saw an increase over FY19 funding (33 out of 41 agencies)
• Some agencies saw a reduction in funds, compared to FY19, related solely to their performance relative to statewide average
• Seven agencies received transition assistance
• Some agencies will perform better when the recommended formula (50/30/10/10) is implemented
Agency Examples – Operating Assistance

• Hampton Roads Transit
  • Received less than FY19 – yet performs better under the new formula

• PRTC and Fairfax County
  • Received more in FY20 than FY19 – receives transition assistance to offset impact of formula, but impact is less than anticipated

• VRE
  • Received less in FY20 than FY19 – receives transition assistance to offset impact of formula, due to smaller share in commuter rail sizing based on new PMT data

• Blacksburg Transit
  • Received less in FY20 than FY19 – receives transition assistance to offset impact of formula, FY21 formula increases emphasis on ridership and will benefit agencies like Blacksburg Transit

• Rural and Small Urban systems
  • Generally saw increases in FY20 over FY19
Operating Program – Evaluation and Recommendations
Program Evaluation

- FY20 was established as a transition year:
  - Transition formula
  - Transition assistance

- Process generally worked as expected, with some variations:
  - Incorporation of a new year of performance data
    - Statewide trends adjust each year
    - Evaluated at agency level (i.e. HRT and VRE to determine reasons for variance from TSDAC scenarios)
  - Commuter Rail sizing metrics produced the greatest variation over the testing scenarios
Impact of HRT Performance
Old Allocation Process

<table>
<thead>
<tr>
<th>Recipient</th>
<th>FY20 Operating Assistance Traditional Plus Performance Based</th>
<th>FY19 Operating Assistance Traditional Plus Performance Based</th>
<th>Difference</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hampton Roads Transit</td>
<td>$19,212,388</td>
<td>$20,062,372</td>
<td>$(849,984)</td>
</tr>
</tbody>
</table>

- If NO changes were made to the allocation process and the same $ amount of funds were allocated in total for FY 2020
- Impact of HRT’s performance was negative $849,984
Impact of HRT Performance Old Allocation Process

<table>
<thead>
<tr>
<th></th>
<th>FY 2015</th>
<th>Percentage Change</th>
<th>FY 2016</th>
<th>Percentage Change</th>
<th>FY 2017</th>
<th>Percentage Change</th>
<th>FY 2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>HRT</td>
<td>16,391,418</td>
<td>-7.2%</td>
<td>15,209,663</td>
<td>-3.7%</td>
<td>14,653,642</td>
<td>-6.1%</td>
<td>13,761,674</td>
</tr>
<tr>
<td>Statewide Total</td>
<td>72,693,614</td>
<td>-4.2%</td>
<td>69,673,182</td>
<td>-2.0%</td>
<td>68,259,067</td>
<td>-5.3%</td>
<td>64,666,565</td>
</tr>
</tbody>
</table>

- Most significant cause of performance drop was rate of decline in ridership as compared to the statewide average
- Ridership had the largest impact on the old allocation model
### Impact from Performance Based Allocation Mandated by General Assembly

<table>
<thead>
<tr>
<th>Recipient</th>
<th>FY20 Operating Assistance 100% Performance Based</th>
<th>FY20 Operating Assistance Traditional Plus Performance Based</th>
<th>Difference</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hampton Roads Transit</td>
<td>$19,869,838</td>
<td>$19,712,519</td>
<td>$157,319</td>
</tr>
</tbody>
</table>

- Impact of new model on HRT was **positive** $157,319
- Budget bill language stipulates a ‘negative’ impact in order to receive transition assistance
Commuter Rail Sizing Metric

<table>
<thead>
<tr>
<th>System Sizing: Bus Systems</th>
<th>System Sizing: Commuter Rail</th>
<th>Performance Adjustment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Operating cost (50%)</td>
<td>Passenger Miles Traveled (33%)</td>
<td>Passengers per Revenue Vehicle Hour (20%)</td>
</tr>
<tr>
<td>Ridership (30%)</td>
<td>Revenue Vehicle Hours (33%)</td>
<td>Passengers per Revenue Vehicle Mile (20%)</td>
</tr>
<tr>
<td>Revenue Vehicle Hours (10%)</td>
<td>Revenue Vehicle Miles (33%)</td>
<td>Operating Cost per Revenue Vehicle Hour (20%)</td>
</tr>
<tr>
<td>Revenue Vehicle Miles (10%)</td>
<td></td>
<td>Operating Cost per Revenue Vehicle Mile (20%)</td>
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</table>

- Evaluated the reasoning behind the variance and isolated it to the Passenger Miles Traveled element of the Commuter Rail Sizing Metric
  - While overall ridership increased, the average trip length decreased – resulting in lower PMT reported to NTD
  - VRE currently estimates their average trip length and ridership between station pairs – APC coming on line in the next couple of years
  - Data utilized for PMT estimates was two years old (compared to one year lag for other metrics)
FY21 – Operating Formula Recommendations

- Formula will adjust to the 50/30/10/10 Sizing Metrics in FY21 – there will be variations from FY20
- Additional year of performance data will be collected and validated (2019), resulting in adjustment of statewide trend lines

Recommended Process Modification for FY21:
- PMT data lag can be addressed by collecting PMT data from those agencies required to collect and report to NTD, as part of their application
  - 16 agencies would be required to report this data point as part of their state operating application, which do not do so now
  - 25 agencies are not required to report this data to NTD (63% of systems, representing less than 10% of operating assistance distributed by DRPT)
FY21 – Special Programs
Special Programs – Updates

- In addition to Capital and Operating, significant updates were made to the TDM programs in FY20 (process and guidance).

- For FY21, the remaining programs are being updated to clearly articulate state goals/objectives, incorporate metrics and performance reporting, and clarify application requirements:
  - Demonstration
  - Technical Assistance
  - Intern
  - 5310 (Human Service)
Update on Strategic Plans
Transit Strategic Plans

• Two agencies identified as pilots:
  • Hampton Roads Transit – developing TSP from scratch
    ▪ Wrapping up a comprehensive public outreach effort, developing recommendations for release in August
    ▪ Draft plan to be complete in November, with Commission adoption in December
  • Greater Lynchburg Transit – just completed TDP, transitioning to TSP
    ▪ Consultant work to transition TDP document to TSP
    ▪ Anticipated completion – Fall 2019

• Other agencies working on Transit Strategic Plans:
  • Suffolk Transit – not required, but requested to improve coordination in the Hampton Roads Region – Completion in 2019
  • Petersburg Area Transit – Completion in 2019
  • PRTC – Completion in 2019
Transit Strategic Plans – Next Steps

• Many agencies are eager to get started on their TSP process – great news!
• Transit agencies are working with their MPOs on potential funding support
• As pilots near completion, we are evaluating the guidance for any adjustments that may be necessary.

• Phase 2 Agencies (transitioning a recently completed TDP to meet TSP requirements) should begin work late 2019/early 2020
  • DRPT will conduct outreach this fall with those agencies
  • Phase 2 Agencies should be considering technical assistance applications in the FY21 cycle

• Phase 3 Agencies (those developing TSP from scratch)
  • DRPT will conduct outreach in Spring 2020
  • Phase 3 Agencies should be considering technical assistance applications in the FY22 cycle
TSDAC – Look Ahead
Next Steps

• December Meeting
  • Updates on process implementation for FY21 grant cycle
  • Economic Impacts of Transit – briefing on study
  • Needs Assessment/Trends – briefing on study

• Summer 2020
  • Review of FY2021 Capital/Operating Process/Outcomes