



Making Efficient • Responsible Investments In Transit

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# TSDAC Meeting

## July 31, 2019



Virginia Department of Rail and Public Transportation

# Today's Agenda

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- 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

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# Statewide Transit Capital Prioritization

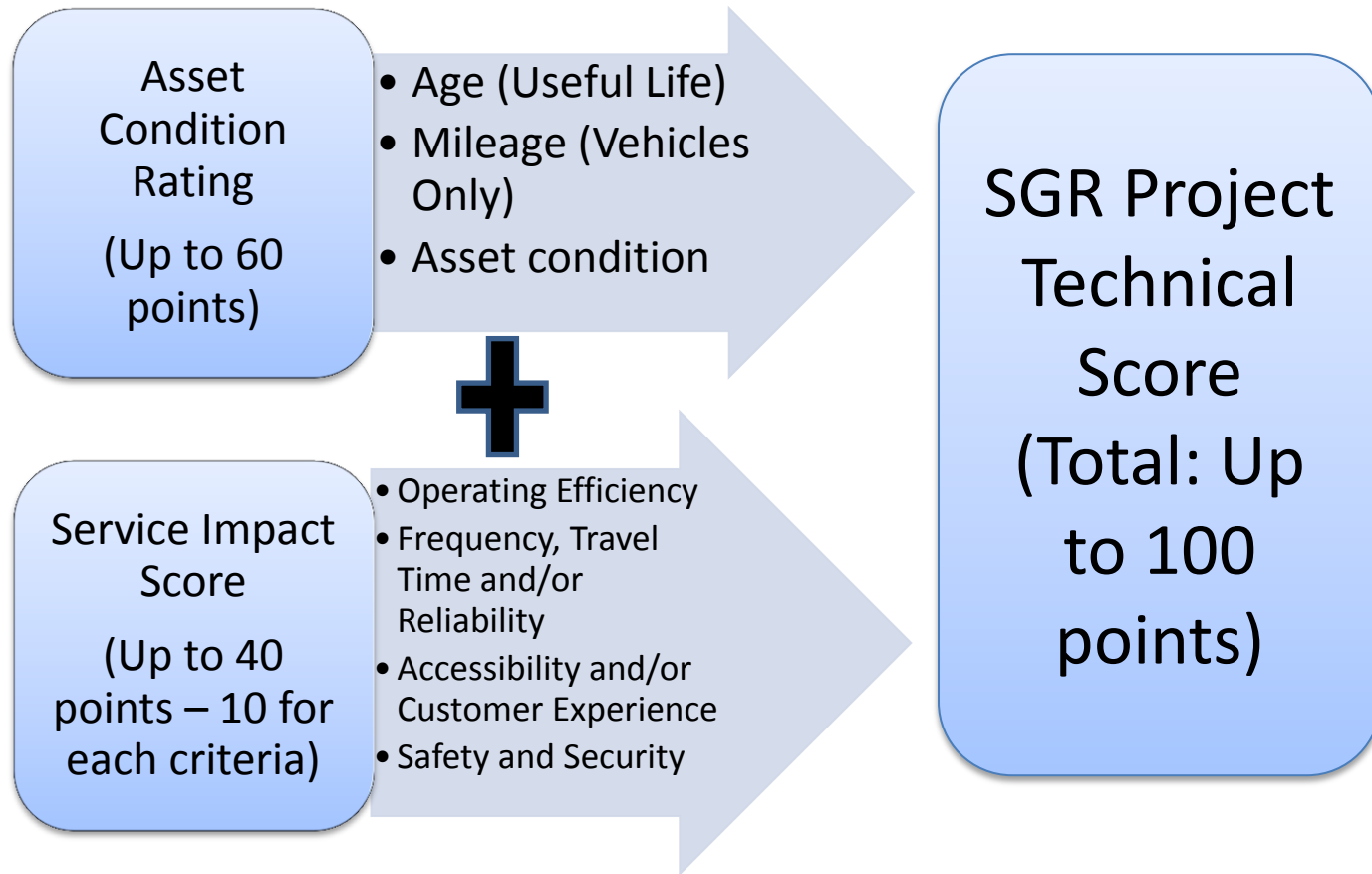
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- Effective July 1, 2019
- State of Good Repair
  - Based on transit asset management principles, including federal requirements for Transit Asset Management
- Major Expansion
  - Based on SMART SCALE factors:
    - Congestion mitigation
    - Economic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

# Scoring Methodology

## State of Good Repair Projects

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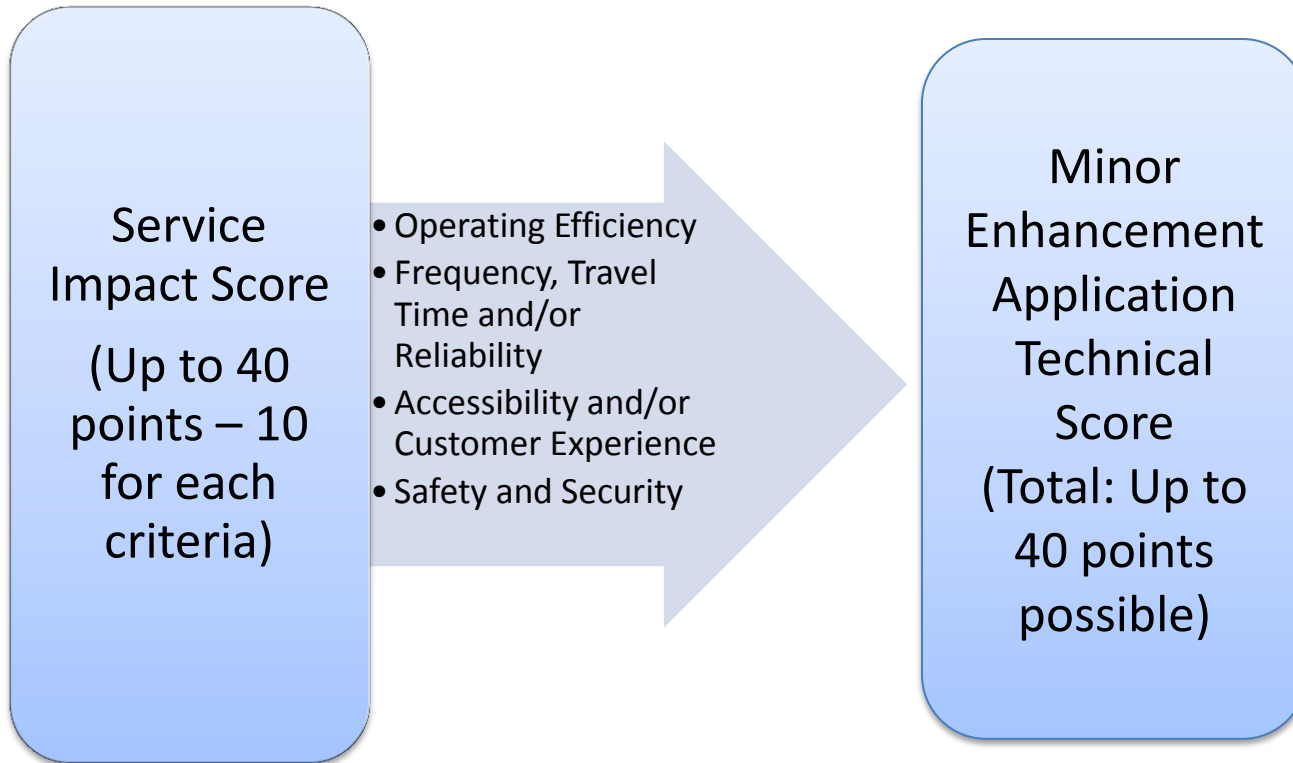
# State of Good Repair

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- 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

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# Minor Enhancement Scoring

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- 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

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

# Major Expansion Scoring

- 4 Major Expansion Projects scored, all recommended for funding

Project	Total Benefit Score	Transit Capital \$	MERIT Score
Potomac Yard Metro South Entrance	47.7	\$25M	19.1
Crystal City Metro East Entrance	37.3	\$41.4M	9.1
CCPY Transitway Extension	23.5	\$14.6M	16.1
Route 1 Transitway Extension	17.6	\$2.5M	70.5

# Capital Program – Evaluation and Recommendations

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# Identification of Issues/Trends

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- 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

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- 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

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- Generally, the scoring and prioritization of projects that fit the MIN program definition was straight forward 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

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- 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



Spring Grant Workshop/Webinar  
June 24, 2019

Agenda



Agenda



1. Introduction and Overview of Grant Administration Procedures Document
2. Development and Execution of Grant Agreements
  - Key Steps
  - Grant Recipient Review
3. Grant Reimbursements
  - Requirements and Key Steps
  - Support Documents
  - Indirect Costs
  - Travel Reimbursements
  - Transit Operating Assistance Payments
4. Project Time Extension Requests
5. Project Budget and Scope Change Requests
6. Training Assistance
7. Project Oversight
  - DRPT Engineering Oversight
  - Quarterly Program/Project Reviews
  - 5310 Vehicles and Mobility Management
8. Grant Close-Out
9. Asset Management
  - Transit Asset Management (TAM) Plans
  - Transit Capital Inventory and TransAM
10. Safety Plans
11. SMART SCALE Round 4
12. Wrap Up and Next Steps

6/24/2019



# 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

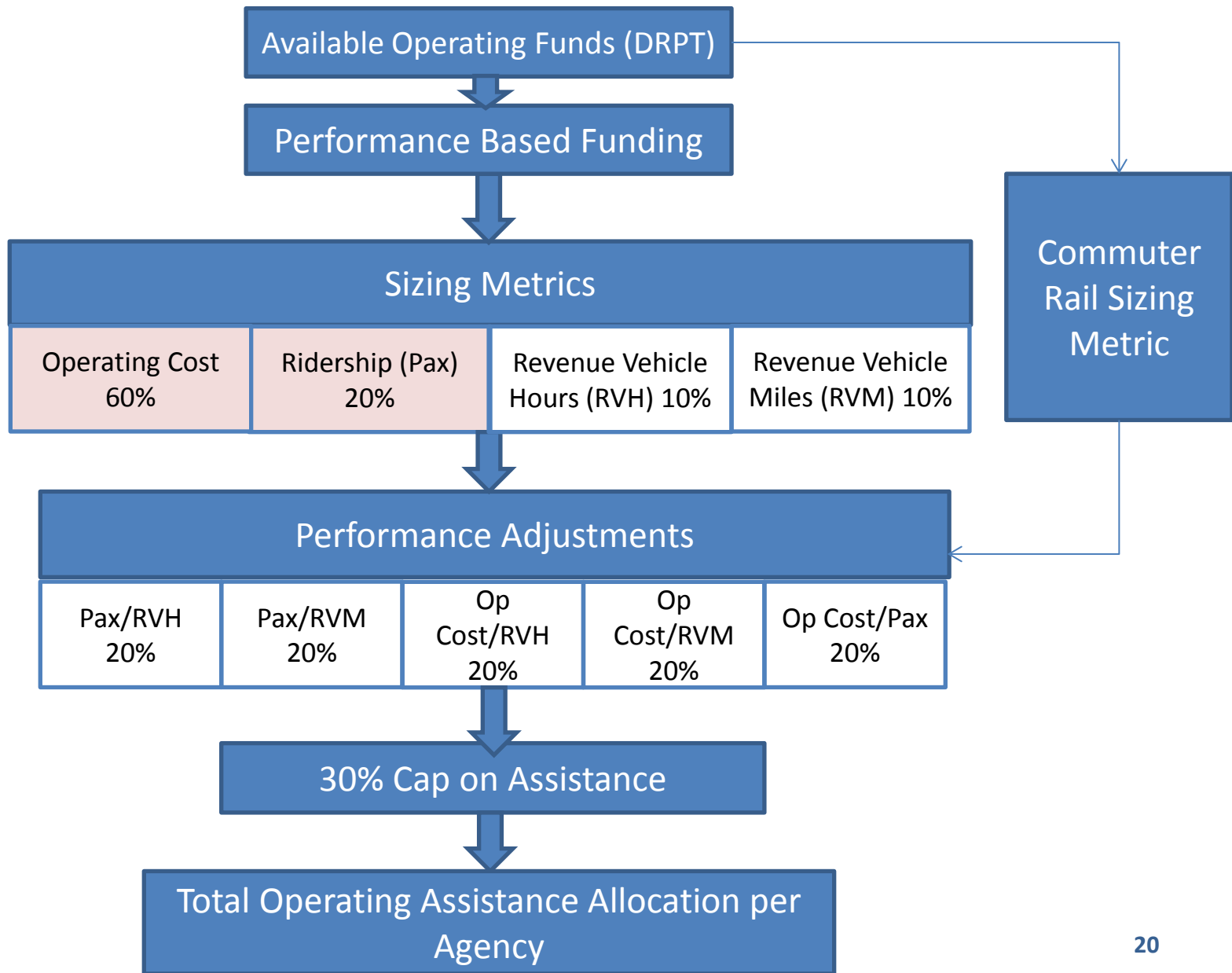
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- Continued refinement of the application with link to TransAM, online scoring
- Evaluation of SGR scoring methodology as SGR backlog decreases - should points distribution be adjusted for “just in time” arrival of replacement assets
- Evaluation of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

# FY20 – Operating Process/Outcomes

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# Operating Assistance Allocation Methodology – FY2020



# Transit Operating Assistance

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## 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

# Transit Operating Assistance

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## 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

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- 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

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# Program Evaluation

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- 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

Recipient	FY20 Operating Assistance Traditional Plus Performance Based	FY19 Operating Assistance Traditional Plus Performance Based	Difference
Hampton Roads Transit	\$ 19,212,388	\$ 20,062,372	\$ (849,984)

- 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

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

- 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

Recipient	FY20 Operating Assistance 100% Performance Based	FY20 Operating Assistance Traditional Plus Performance Based	Difference
Hampton Roads Transit	\$ 19,869,838	\$ 19,712,519	\$ 157,319

- 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

System Sizing: Bus Systems	System Sizing: Commuter Rail	Performance Adjustment
Operating cost (50%)	Passenger Miles Traveled (33%)	Passengers per Revenue Vehicle Hour (20%)
Ridership (30%)	Revenue Vehicle Hours (33%)	Passengers per Revenue Vehicle Mile (20%)
Revenue Vehicle Hours (10%)	Revenue Vehicle Miles (33%)	Operating Cost per Revenue Vehicle Hour (20%)
Revenue Vehicle Miles (10%)		Operating Cost per Revenue Vehicle Mile (20%)
		Operating Cost per Passenger (20%)

- 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

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- 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

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# Special Programs – Updates

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- 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

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# Transit Strategic Plans

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- 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

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- 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

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# Next Steps

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- 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