How to Engage Your Transit Asset Management Stakeholders

2019 APTA/FTA Webinar Series: Part 2
American Public Transportation Association

APTA leads public transportation in a new mobility era, advocating to connect and build thriving communities.

1. **APTA Leads** As the voice for public transportation, proactively and assertively shaping and responding to actions that impact public transportation

2. **Public Transportation** Supporting the needs of public transportation agencies acting in the public good

3. **New Mobility Era** Helping members anticipate, prepare for and understand the changes that are shaping our industry

4. **Advocating** Fervently promoting the interests of the public transportation industry in all venues

5. **Thriving Communities** Using transportation to enable individuals to access opportunities that improve their lives
Transit Asset Management Activities

1. Transit Performance Management Subcommittee
   • Of the Planning, Policy, & Program Development Committee

2. Standards and Recommended Practices
   • State of Good Repair/Transit Asset Management Working Group

3. APTA/FTA TAM Webinar Series

4. Research and Reports
   • Economic Cost of Failing to Modernize Public Transportation

5. APTA Conferences and Sessions
State of Good Repair/Transit Asset Management Working Group

Mission:

To develop guidance for transit agencies as they implement asset management programs in compliance with FTA regulations and in alignment with industry best practice. This guidance, which may consist of white papers, training materials, presentations, and webinars, will complement the resources that have been published by the FTA with examples developed by industry peers.
Guidance Published

1. Communicating Your Transit Asset Management Plan
2. Improving Asset Management Through Better Asset Information
3. Building Internal Stakeholder Support for Your Asset Management Program
4. Communication and Coordination with External Stakeholders for Transit Asset Management

All are available on the APTA Standards website.
Documents in Development

1. Procuring Software to Support Transit Asset Management
2. Using Asset Criticality to Make Investment Decisions
3. How to Build an Asset Management Team

Target publish date: Winter 2020
What’s Next?

Theme of Documents: Continuous Improvement

• TAM Policy Creation and Implementation
• Identifying and Incorporation of Risk into TAMPs
• Incorporating Climate Vulnerability into TAMPs
• Best practices in using condition assessments and predicative maintenance into improved performance
• Best practices in linking TAMPs and Safety Plans
APTA/FTA Webinar Series

Held on April 25, 2019: Communicating TAM Compliance and Programs
  • Tools and resources for communicating the value of TAM agency executives and staff. Presentation slides and recording available on APTA website.

October 8, 2019: Engaging Your TAM Stakeholders
  • Communicating and involving both internal and external stakeholders in transit asset management involves coordinated but different approaches.

Planned, Late Fall 2019: Best Practices for Data Collection
Stakeholder Engagement
Many stakeholders are involved with each asset throughout the asset’s lifecycle.
Stakeholder Engagement

Public Transportation Agency Safety
- SMS Hazard Identification/Risk Assessment
- Establish Safety Targets
- Hazard, Control, and Monitoring Strategy
- Public Transportation Agency Safety Plan

Transit Asset Management
- Asset Inventory/Condition Assessment
- Establish SGR Targets
- Transit Asset Management Plan
- Prioritize Investments/Program of Projects
- Program Formula Funds
- Submit Annual Report

Transportation Planning
- MPO and State Performance Targets
- Integrate Performance Based Plans
- Metropolitan and Statewide Long Range Plans
- Adopt TIP/STIP
Today’s Moderator and Speakers

- Laura Zale, Manager of Asset Management, Southeastern Pennsylvania Transportation Authority (SEPTA), Philadelphia, PA
- Victor Rivas, Strategic Consulting – Asset Management, Jacobs, Boston, MA
- Jordan Holt, Director of Performance, Washington Metropolitan Area Transit Authority (WMATA), Washington, DC
- Todd Lang, Director of Transportation Planning, Baltimore Metropolitan Council, Baltimore, MD
To submit a question or comment to the panel during the webinar, please type it into the **Question** box on your screen and click on the send arrow located at the bottom of the box.

**Be a Part of the Dialogue.**
Victor Rivas
Strategic Consulting – Asset Management
Jacobs
Boston, MA
Building Internal Stakeholder Support for an Asset Management Program

Recommended practice document highlighting strategies that a transit organization can use to build internal stakeholder support and buy-in for its asset management efforts
Internal Stakeholders
Internal Stakeholders

• Accountable Executive (Chief Executive Officer)
• Senior Leadership
• Operations and Maintenance Staff
• Administrative and Clerical Staff
• It includes Contractors
Why is Important to Build Internal Stakeholder Support for Asset Management?
Asset Management Guiding Principles

*Maintain, update and enhance* the agencies asset inventory to better invest in a state of good repair.

*Monitor and improve the condition* of transits assets efficiency by setting annual performance measures and targets, documenting the progress towards those targets.

*Invest in state of good repair* based on a structured decision framework to ensure available funds are spent where they are most needed.

*Maintain a list of investment priorities* that consider safety, accessibility and available funding.
Asset Management Maturity Development

- Lifecycle Activities/Asset Care
- Value & Long-Term Outcomes
- Fault/Incident Management
- Performance Management
- Asset Inventory/Condition
- Criticality and Risks
- Acquisition Cost
- Total Lifecycle Cost
- People/Technical Skills
- Collaboration
Benefits of Transit Asset Management

• Optimized use of resources (human and financial) while being able to deliver the best value to the customer
• Increased communication among departments with improved collaborative behavior within the agency
• Improved public image through increased transparency and accountability
• Enhanced opportunities for highlighting and replicating best practices
Asset Management is an Agency-wide Effort

Advancing asset management to a higher level of maturity cannot be achieved by a single department or operational unit, it requires the support and engagement of the entire organization.
Common Challenges
Common Challenges

• **Challenge 1**: Some employees do not understand the relevance or impact of asset management in their daily activities.

• **Strategy**: Articulate/reiterate/model expectations
  Raise awareness of the benefits of asset management to the agency and the departments, and how individual contributions make a difference.
Common Challenges

• **Challenge 2**: People are too busy to deal with additional work/initiatives. Staff feel that the responsibility lies elsewhere.

• **Strategy**: Create and build team culture
  Emphasize the importance of achieving the agency’s goals as a fully collaborative effort while establishing the internal stakeholders share of responsibility and accountability
Common Challenges

• **Challenge 3** : Staff show a lack of interest: “It’s not in my job description.”

• **Strategy: Develop personal buy-in**
  Ensure that employees fully understand how their roles fit within the bigger picture. Self-motivation is key to performance.
Achieving and Sustaining Asset Management Buy-in
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Communications and awareness-building

- Consider establishing asset management liaisons (TAMbassadors)
- Education
  - Sample avenues for reaching out to internal stakeholders
    - Printed and electronic media
    - Regular briefings
    - Targeted workshops
Achieving and Sustaining Asset Management Buy-in

Top-down leadership and commitment

• Accountable Executive
• Asset Management Executive Team
• Department Heads
Securing strong endorsement from the top will help further the asset management agenda with front line employees.
Achieving and Sustaining Asset Management Buy-in

Leveraging improved asset information

Asset information is in constant state of renewal, therefore the need to ensure continuous alignment of the following core business processes:

• Asset management vision and direction
• Life-cycle management
• Cross-asset planning and management
To ensure asset management long-term viability the agency could consider special workforce development strategies such as:

- recruitment of personnel capable of supporting asset management functions
- asset management training
- succession planning
Thank you.
Presenters

Jordan Holt
Director of Performance
Washington Metropolitan Area Transit Authority (WMATA)
Washington, DC

Todd Lang
Director of Transportation Planning
Baltimore Metropolitan Council
Baltimore, MD

Recommended practices for communicating with a range of stakeholders about a transit agency’s transit asset management (TAM) program and plan.
Who?
Transit Asset Management Stakeholders

Transit Board
- How should we best allocate our available resources considering the need to preserve the system and improve service?

Municipal Administration
- How do we balance needs for transit with pressing needs in other areas?

Metropolitan Planning Organization
- How do the investments described in the TAMP support regional performance targets?

State Department of Transportation
- Are TAM best practices applied consistently between all of the transit agencies in the state?

Federal Transit Administration
- Has the agency complied with Federal requirements?

Elected Officials
- How do we address the concerns expressed by our voters?

Media
- Is the condition of the system getting better or worse, and what is that agency doing about it?

The Public and Public Interest Groups
- How can we best improve transit service?

Internal and External Auditors
- Is the agency investing as it describes in its TAMP?
Why?
Benefits of Effective Communication and Coordination

- Shared understanding of needs
- Increased credibility
- Improved results

We agree these investments are needed and our top 3 priorities are...
Where and when?
Means of Communicating

• Informal and formal
• Go beyond federal requirements
• Use multiple channels
  • In person
  • websites
  • presentations
  • posters
  • videos
  • fact sheets
  • reports and plans
  • press releases
  • social media
• Omit sensitive information
How?
Communication Strategies

- Know what you want
- Know your audience’s interests
- Avoid the weeds
  - Focus on big asset groups
  - Collapse condition data into two categories
- Be clear and succinct
- Use simple bar or line graphs
- Provide context and use pictures
What?
What is TAM?

- Set of tools and approaches to manage physical transportation assets more efficiently
- Helps agencies best maintain their assets, balancing competing needs for finite resources
What is SOGR?

If 60% of our vehicles are beyond their useful life, does that mean they are unsafe?

• “State of Good Repair” means that assets are in fair or better condition and/or are not beyond their useful life
• SOGR ≠ Safety
• Costs less in long-run and results in better service for customers
What is our backlog?

- Backlog = cost of achieving a state of good repair and then maintaining it over time.
What happens if we don’t invest in SOGR?

Impact on customers

Impact on backlog

2012–2032 Future Transit Capital Investment Scenarios

<table>
<thead>
<tr>
<th>ANNUAL AVERAGE INVESTMENT*</th>
<th>PREVENTION*</th>
<th>EXPANSION*</th>
<th>SYSTEM PRESERVATION BACKLOG*</th>
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<tr>
<td>State of Good Repair (SUR)</td>
<td>$17.0</td>
<td>$17.0</td>
<td>$0.0</td>
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<tr>
<td>Sustain Spending at 2012 Level</td>
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<td>Low-Growth Scenario</td>
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<td>High-Growth Scenario</td>
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</tbody>
</table>

*Billions of 2012 Dollars
How do we compare to others?

Why didn’t we meet our targets last year?

What are we doing to lower our targets in the future?

How much will it cost to reduce the target to match Agency X’s target?

Agency X is about the same age as us and/or has the same number of vehicles. Why are their targets and asset condition so much “better” than ours?

How is it OK to have a performance target that 60% of our vehicles are beyond their useful life?

Why didn’t we meet our targets last year?
Thank you.
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Asking Audience Questions

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