Fiscal Year 2015
Annual Transit Provider Meeting

MONDAY, SEPTEMBER 15, 2014
10:00 AM – 11:00 AM

North Central Texas Council of Governments
Regional Transit Coordination and Operations Team

*Jessie Huddleston, Program Manager*

**Funding, Reporting and Compliance**
Nick Vail, Senior Transportation Planner
Leah Brown, Transportation Planner II

**Planning and Project Implementation**
Sarah Chadderdon, Senior Transportation Planner
Jamie Patel, Senior Transportation Planner
Robert Pacleb, Transportation Planner III
Kelli Schlicher, Transportation Planner II
Nichole Collett, Intern
**Our Role(s)**

**North Central Texas Council of Governments (5%)**
Assist local governments in planning for common needs and cooperating for mutual benefit in a 16-county region

**Metropolitan Planning Organization (20%)**
Regional Transportation Council sets transportation policy
Programs all federal funding in the region (TIP)
Coordinated transportation planning in a 12-county region

**Designated Recipient of Federal Transit Funding (75%)**
Managing Subrecipients
Reimbursements
Oversight and Compliance
Focused on the Urbanized Areas in 8 counties
Definitions

Until 2014, we used a simple classification: Subgrantee or Direct Recipient

Changes in FTA programs and structure have made describing providers, services and funding relationships more complicated

**Traditional Providers** – If you are reading this, it means you (i.e., local governments providing public transportation). You have a permanent relationship with us.

**Non-traditional Providers** – Not you (e.g., Yellow Cab). They do not have a permanent funding relationship with us.

**Non-profits** – Also, not you (e.g., Catholic Charities). They do not have a permanent funding relationship with us.
Public Transportation Funding
## Past, Present, and Future

<table>
<thead>
<tr>
<th></th>
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</tr>
</thead>
<tbody>
<tr>
<td>Theme</td>
<td>Business as usual</td>
<td>Catching up</td>
<td>Getting back on track</td>
</tr>
<tr>
<td>Program Changes</td>
<td>None as SAFETEA-LU continues</td>
<td>Lots of changes due to MAP-21</td>
<td>None as MAP-21 continues</td>
</tr>
<tr>
<td>Funding Levels</td>
<td>Steady increase</td>
<td>Significant increase due to 2010 Census</td>
<td>Steady increase</td>
</tr>
<tr>
<td>Availability*</td>
<td>Middle of the fiscal year</td>
<td>End of the fiscal year</td>
<td>Middle of the fiscal year (GOAL)</td>
</tr>
<tr>
<td>Operating Assistance</td>
<td>Lots of exceptions</td>
<td>Limited eligibility</td>
<td>Limited eligibility</td>
</tr>
</tbody>
</table>

*Generally, March is when FTA makes full-year funds for the fiscal year available for allocation.
Fiscal Year 2013 – 2014: Catching up

**Funding amounts**
Four formula programs ≈ $115M annually
- Urbanized Area Formula (JA/RC merged)
- Enhanced Mobility (New Freedom merged)
- State of Good Repair (old Fixed Guideway program)
- Bus and Bus Facilities (New as a formula program)

**Availability**
FTA asked us to discontinue “rolling apportionment”
Delayed access to funds until the end of fiscal year

**Operating Assistance**
Most exceptions were eliminated = limited availability
MAP-21 Program Changes: Urbanized Area Formula

**Issue**
How to incorporate non-profits and non-traditional providers since they are eligible for JA/RC funds

**Solution**
2% of the annual apportionment for the DFWA and DL urbanized areas will be awarded competitively to non-traditional providers and non-profits

Only good projects will be funded, remaining funds will be made available to transit authorities

*Remember: Providers in this room can request JA/RC funds through their annual Program of Projects*
MAP-21 Program Changes: Enhanced Mobility

**Issue**
How to ensure that existing services for seniors and individuals with disabilities are not cut due to the elimination of operating assistance exceptions

**Solution**
Funds will be awarded through the Program of Projects process to ensure affected providers continue to operate at existing levels of service

Remainder of funds will be awarded competitively

*Remember: Providers in this room can also compete for the remaining funds for new projects*
MAP-21 Program Changes: Bus and Bus Facilities

**Issue**
How to award funds now that the program is formula based and apportioned directly to large urbanized areas

**Solution**
100% of the funds will be available for award through the annual Program of Projects process

Funds supplement available Urbanized Area Formula Programs funds

*Remember: Only providers in this room awarded funds*
## Summary of Program Changes

<table>
<thead>
<tr>
<th>Program</th>
<th>Method of Award</th>
<th>Eligible Entities</th>
<th>NCTCOG (Urban)</th>
<th>TxDOT (Rural)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Urbanized Area Formula</td>
<td>Program of Projects</td>
<td>Public transit providers</td>
<td>$ (Includes JA/RC)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Competitive</td>
<td>Non-profits and others</td>
<td></td>
<td>$ (only JA/RC)</td>
</tr>
<tr>
<td>Nonurbanized Area Formula</td>
<td>Program of Projects</td>
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<td></td>
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<td>Enhanced Mobility</td>
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<tr>
<td>State of Good Repair</td>
<td>Program of Projects</td>
<td>DART and The T</td>
<td>$</td>
<td></td>
</tr>
</tbody>
</table>
Fiscal Year 2014 Programs of Projects: Overview

Total Funds Recommended for Award = $111M

DISTRIBUTION BY PROVIDER

- DART: 69%
- DCTA: 6%
- The T: 20%
- All Others: 5%

DISTRIBUTION BY PROJECT

- Preventive Maintenance: 76%
- Operating Assistance/Purchase of Service: 8%
- Vehicles: 11%
- Other Capital Items/Planning: 5%
## Fiscal Year 2014 Program of Projects: Schedule

<table>
<thead>
<tr>
<th>Action</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Providers submitted Program of Projects (POP)</td>
<td>July 1, 2014</td>
</tr>
<tr>
<td>POPs presented to public for comments</td>
<td>September 8 – 10, 2014</td>
</tr>
<tr>
<td>Regional Transportation Council awards funds</td>
<td>October 9, 2014</td>
</tr>
<tr>
<td>NCTCOG sends funding award letter to FTA</td>
<td>October 2014</td>
</tr>
<tr>
<td>Providers apply for grants and enter into contracts with subgrantees, if applicable</td>
<td>November – December 2014</td>
</tr>
</tbody>
</table>


Fiscal Year 2015
Program of Projects

GETTING BACK ON TRACK
## Are we there yet?

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</table>
Getting Your Federal Funding Faster

**FY 2008 - 2012**
“Rolling apportionments” allowed us to estimate funds available and carryover difference to next year.

**FY 2013 – 2014**
No estimation; Program of Projects (POP) process did not start until all Federal funds made available.

**FY 2015**
Estimate funds available, conduct the POP process based on estimates and then adjust (increase/decrease) POPs based on final amount of funds available.

Similar to “rolling apportionments” except the difference between estimated and actual funds won’t carryover.
## Fiscal Year 2015 Program of Projects: Schedule

<table>
<thead>
<tr>
<th>Action</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Providers submit proposed Program of Projects (POP)</td>
<td>October 1, 2014</td>
</tr>
<tr>
<td>NCTCOG reviews and adds POPs into the Transportation Improvement Program (TIP)</td>
<td>October 2 – November 28, 2014</td>
</tr>
<tr>
<td>POPs presented to public for comments</td>
<td>December 8 – 10, 2014</td>
</tr>
<tr>
<td>Regional Transportation Council awards funds</td>
<td>January 8, 2015</td>
</tr>
<tr>
<td>NCTCOG sends partial funding award letter to FTA</td>
<td>January 2015</td>
</tr>
<tr>
<td>Direct recipients apply for grants and enter into contracts with subrecipients, if applicable</td>
<td>February – April 2015</td>
</tr>
<tr>
<td>POPs will be adjusted (increase/decrease) after all Federal funds are made available and NCTCOG will send a final funding award letter to FTA</td>
<td>TBD</td>
</tr>
</tbody>
</table>
## Estimated Funds for Fiscal Year 2015 Program of Projects

<table>
<thead>
<tr>
<th>Program</th>
<th>Dallas-Fort Worth-Arlington</th>
<th>Denton-Lewisville</th>
<th>McKinney</th>
</tr>
</thead>
<tbody>
<tr>
<td>Urbanized Area Formula*</td>
<td>$72.4M</td>
<td>$4.9M</td>
<td>$2.6M</td>
</tr>
<tr>
<td>Enhanced Mobility*</td>
<td>$2.2M</td>
<td>$85k</td>
<td>TxDOT awards</td>
</tr>
<tr>
<td>State of Good Repair</td>
<td>$21.0M</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Bus and Bus Facilities</td>
<td>$6.3M</td>
<td>$430k</td>
<td>TxDOT awards</td>
</tr>
</tbody>
</table>

*Amounts listed do not include estimated funds to be awarded through Call for Projects*
Operating Assistance Overview

MAP-21 rules for operating assistance eligibility in large urbanized areas (i.e., Dallas-Fort Worth-Arlington and Denton-Lewisville) favor fixed/commuter bus service.

Extremely limited availability to support demand response.

Small providers operating demand response services currently rely on old balances from SAFETEA-LU era and RTC’s decision to use Enhanced Mobility funds.

Unless the rules change, the future is in fixed route and commuter bus service.
## Operating Assistance Rules

<table>
<thead>
<tr>
<th>Funding Program</th>
<th>Targeted Population</th>
<th>Eligibility</th>
<th>Availability</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enhanced Mobility</td>
<td>Seniors and people with disabilities</td>
<td>Maintain existing service levels for affected providers</td>
<td>Limited; $1.2M total</td>
</tr>
<tr>
<td>Urbanized Area Formula</td>
<td>General public</td>
<td>Must operate fixed or commuter service and use fewer than 100 buses in peak</td>
<td>Amount based on vehicle service hours reported to National Transit Database</td>
</tr>
<tr>
<td></td>
<td>Americans with Disabilities (ADA)</td>
<td>Providers operating ADA complementary service</td>
<td>No more than 10% for entire urbanized area’s apportionment</td>
</tr>
<tr>
<td></td>
<td>Low income (JA/RC)</td>
<td>New, expanded or continued JA/RC services</td>
<td>Amount based on projected cost of service</td>
</tr>
</tbody>
</table>
Operating Job Access / Reverse Commute (JA/RC) Services

Services must be targeted toward low income individuals

Both demand response and fixed/commuter bus services are eligible to receive funding

However, providers operating fixed/commuter providers also become eligible (see rule on previous slide) for additional operating assistance when the service is reported to the National Transit Database

Remember to request JA/RC funds in your POP if you have a new, expanded or continued service
Keys to Developing Your POP

Review annual expenses – are there any trends?

Leftover funds – are old funds still available?

Anticipate growth – are there any new services starting?

For large capital projects – has planning been completed to ensure FTA will approve funds in a grant?

Small providers may request Transportation Developments Credits (TDCs) as match for capital
Fiscal Year 2015 Program of Projects Recap

This year we are “getting back on track”

Available funding amounts are estimated and may change

Focus on the keys to developing your POP

Review operating assistance eligibility

Determine whether fixed route or commuter services is in your agency’s best interests

All providers submit Fiscal Year 2015 Program of Projects to NCTCOG by October 1, 2014
Call for Projects

www.nctcog.org/ftafunding
# 2015 Call for Projects

Opens February 2015; Award August 2015

New, continued or expanded service

<table>
<thead>
<tr>
<th>Funding Type</th>
<th>Fiscal Year</th>
<th>Dallas - Fort Worth - Arlington</th>
<th>Denton – Lewisville</th>
<th>McKinney</th>
</tr>
</thead>
<tbody>
<tr>
<td>Job Access / Reverse Commute * Only for non-traditional providers</td>
<td>2014</td>
<td>$1.4M</td>
<td>$100k</td>
<td>No set aside</td>
</tr>
<tr>
<td></td>
<td>2015</td>
<td>$1.4M (est.)</td>
<td>$100k (est.)</td>
<td>No set aside</td>
</tr>
<tr>
<td>Enhanced Mobility of Seniors and Individuals w/ Disabilities</td>
<td>2014</td>
<td>$800k</td>
<td>$100k</td>
<td>TxDOT awards</td>
</tr>
<tr>
<td></td>
<td>2015</td>
<td>$900k (est.)</td>
<td>$105k (est.)</td>
<td>TxDOT awards</td>
</tr>
</tbody>
</table>
Job Access / Reverse Commute

Projects that provide transportation services that support low-income individuals:

- to/from employment (Job Access)
- from urban to suburban employment locations (Reverse Commute)

Eligible Expenses
- Capital, Planning, Operating

Eligible Applicants (No one here!)
- Non-Traditional Transportation Providers (non-profits, cities, etc.)

- Don’t apply through competitive process
- Request funds through POP
- Coordinate with cities to include service into your POP
Enhanced Mobility of Seniors and Individuals with Disabilities

*Projects that serve seniors and individuals with disabilities when public transportation is insufficient, inappropriate, or unavailable*

**Eligible Expenses**
- Capital, Operating

**Eligible Applicants**
- Non-Traditional Transportation Providers
- Public Transit Providers *(only new projects)*

**Everyone here, don’t apply:**
- For funds to make up operating expense shortfalls
- For existing services funded through the Program of Projects (POP)

- Apply through competitive process
- Be creative
- Remember that there may not be a lot of operating funds
What Makes a Good Project?

<table>
<thead>
<tr>
<th>Category</th>
<th>Key Attributes</th>
</tr>
</thead>
</table>
| Need                            | • Clearly Identified Value Proposition  
                                | • Documented (Access North Texas, other)                                      |
|                                 | • Best Use of Funding                                                         |
| Innovation                      | • Technology                                                                   |
|                                 | • New Approaches                                                               |
| Implementation and Coordination | • Agency and Personnel Capability  
                                | • Collaboration and Partnerships                                               |
|                                 | • Sustainability                                                               |
| Impact                          | • Seamless Service                                                             |
|                                 | • Gaps Filled                                                                  |
|                                 | • Strategic Value                                                              |
Regional Coordination
ACCESS NORTH TEXAS
AccessNorthTexas.org
Regional Coordination

Utilize Access North Texas
- Call For Projects proposal
- Special projects in your 2015 Program of Projects
- Remember, data is helpful now

Access North Texas in 2015
- What needs to be updated to help meet your goals?

NCTCOG staff can assist with building relationships
Arlington MAX

Commuter service linking the University of Texas at Arlington, the entertainment district, and the Trinity Railway Express

<table>
<thead>
<tr>
<th>Benefits for Arlington</th>
<th>Benefits for DART and The T</th>
</tr>
</thead>
<tbody>
<tr>
<td>Potential catalyst for additional transit service</td>
<td>Building partnerships</td>
</tr>
<tr>
<td></td>
<td>Expanding service without compromising existing commitments</td>
</tr>
</tbody>
</table>
Mesquite COMPASS

Commuter service links Mesquite with DART’s light rail

<table>
<thead>
<tr>
<th>Benefits for Mesquite</th>
<th>Benefits for DART</th>
<th>Benefits for STAR Transit</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tailored to the city’s needs</td>
<td>Innovative, affordable service provision</td>
<td>Access to DART’s customer service, technical, and operational expertise</td>
</tr>
<tr>
<td>Seamless regional connection</td>
<td>Build relationships</td>
<td></td>
</tr>
</tbody>
</table>

NCTCOG support for associated capital costs
Please Remember

- You are the leaders in your communities
- Access North Texas strategies and data are useful now
- Start thinking about what needs to be updated
- NCTCOG staff is here to support you!
Regional Coordination and Vehicle Initiatives

GETTING THE MOST OUT OF WHAT WE HAVE
Changing Landscape

Growth in the region is putting an increased emphasis on developing public transportation options.

Transit providers are being asked to serve more people within their existing service areas.

Many cities wish to test demand for bus services by implementing pilot projects (i.e., Frisco, Allen, Mesquite).

Non-profits are providing additional services.

More partnerships and transit vehicles are needed to provide more service in the short-term.
New Transit Authority Partnership

Address growth beyond DART, DCTA and The T’s boundaries by incentivizing bus service outside of member cities

NCTCOG proposed a partnership that includes:

- $8M for buses and other capital costs
- Transportation Development Credits
- Planning and Coordination Assistance

Since June, all 3 transit authorities have reached out with innovative ideas
Cooperative Vehicle Procurement

Goals

- Increase buying power by grouping agencies together
- Reduce administrative burden by doing one procurement
- Streamline vehicle types to enhance interoperability

Started fourth cooperative vehicle procurement in 2014 on behalf of seven subgrantees

NCTCOG is willing to expand to include new transit partners if there is interest
Regional Vehicle Lease Program

Non-profits and other community agencies have client base generally too small or specialized to contract for service with a public transportation provider.

Rather than purchasing brand new vehicles with Federal funds, NCTCOG is developing a lease program.

Concept
Lease, share or sell vehicles just past their useful lives
Stretch federal investment (100% federally funded)
Self-sustaining model to ensure FTA funds not diverted from traditional transit providers

Starting with deliveries in Winter
Final Thoughts: It is a New Day

Public transportation partnerships and coordination are both on the rise.

There are many opportunities for those who seek them out; standing still is going backwards.

There has never been a better time to focus on local match commitments for operations.

Pay attention and ask questions; we can help.
Questions, comments, discussion?
Fiscal Year 2015
Annual Transit Provider Meeting
Subgrantee Session

MONDAY, SEPTEMBER 15, 2014
11:15 AM – 12:00 PM
Oversight and Compliance
Flow of Oversight

Federal Transit Administration (FTA)
- Monitor grantees for compliance:
  - Three year reviews (mile wide and inch deep)
  - Subject specific reviews (inch wide and mile deep)

Texas Department of Transportation (TxDOT)
- Receive & pass through funds
- Monitor rural subgrantees

North Central Texas Council of Governments (NCTCOG)
- Receive & pass through funds
- Monitor urban subgrantees

Subgrantee Transit Providers
- Use FTA funds to provide public transportation
NCTCOG’s Monitoring Methods

Agreements and Certifications and Assurances (Annually)
Explain rules and requirements when using FTA funds

Desk Reviews (Ongoing)
Includes invoices, reports, policies and other documents

Site Visits (Biannually)
Spot checks to inspect assets and ensure policies followed

Other Activities (Frequency varies)
Subgrantee bulletin, emails, and various meetings
Big Picture Schedule

Spring/Summer 2015
NCTCOG will conduct site visits to each subgrantee
Focus areas include:
• Review of procurements and contracts
• Review of compliance with civil rights legislation:
  Title VI and ADA

Spring/Summer 2016
FTA will conduct Triennial Review
covering FY 2014 - 2016
Desk Review Items Due

If you have not already, please submit the following:

- Calendar Year (CY) 2013 Drug & Alcohol Testing Report
- TxDOT Disadvantaged Business Enterprise (DBE) Semi-Annual Reports for FY 2013 and FY 2014
- Signed and updated Title VI Program
- Agency policies, plans or procedures (Signed versions ) Submit all new or updated since October 2013
National Transit Database

What is it?
• Reporting system for public transportation services
• Monthly and annual on all services (urban and rural)

Why is it significant?
• Required of all Urbanized Area Formula recipients
• Data is used:
  ◦ in FTA’s reports to Congress; and
  ◦ to determine funds available in FTA’s formula funding programs

More service reported = More funds for the region
Keys to Improvement

✔ Strategize internally—designate one point of contact to communicate with NCTCOG and assign staff responsibilities

✔ Submit data based on all public transportation services

✔ Track Transportation Development Credits used to match rural funds and submit TxDOT documentation

✔ FTA analysts who review reports are not familiar with your services so please use clear and concise sentences when addressing data issues
## Tentative Schedule

<table>
<thead>
<tr>
<th>Provider Action</th>
<th>Time Period</th>
</tr>
</thead>
<tbody>
<tr>
<td>Begin working on Report</td>
<td>November 2014</td>
</tr>
<tr>
<td>Send data to NCTCOG</td>
<td>December 2014 – mid January 2015</td>
</tr>
<tr>
<td>Review data &amp; submit to FTA (NCTCOG action)</td>
<td>January 30, 2015</td>
</tr>
<tr>
<td>Correct data &amp; address issues</td>
<td>February – March 2015</td>
</tr>
<tr>
<td>Receive close-out notification</td>
<td>April 2015 <em>(Goal)</em></td>
</tr>
</tbody>
</table>
Procurement System Review (PSR)

RECAP
Background

In June 2014, NCTCOG was selected based on a risk assessment for an FTA Procurement System Review (PSR) in late July

FTA’s objective: to encourage and facilitate improved grantee procurement operations, foster the use of industry best practices, and assess the grantee’s compliance with Federal procurement requirements, specifically the requirements of FTA Third Party Contracting Guidance (4220.1F) and applicable statutory and administrative requirements
Overview of activities

**Prep**
Submit 200 pages of procurement policies
Submit list of procurements (micro & small not included)
Collect and organize files for 21 procurements

**Site Visit**
Review of all NCTCOG’s procurement policies
Review procurement files
Lots of follow-up questions
Formal interviews with seven staff members
Procurement 101

Key components (not an exhaustive list):

- Cost estimate prior to procurement
- Write scope or specs to ensure max competition
- Ensure appropriate federal clauses are included
- Only one bid received = sole source
- Cost analysis of bids before award
- Must be a formal contract signed by all parties
Improvements Needed

Know the rules
FTA Third Party Contracting Guidance (4220.1F)

Ensure policies comply
Are your policies consistent with the rules?

Plan ahead
Provide ample time for NCTCOG to review:
  Procurements before soliciting bids
  Contractor/vendor agreement before signing

Document, document, document
Ensure there is a written record of procurement actions
Follow-up Actions

☑️ NCTCOG sent email regarding “sound and complete” agreements on September 9, 2014

☐ Subgrantees must review and revise (if necessary) existing agreements to ensure compliance

☐ Subgrantees must review and revise (if necessary) agency procurement policies

☐ NCTCOG will increase review of policies, procurements and contracts

☐ NCTCOG will conduct review of procurements during site visits in spring/summer 2015
Cooperative Vehicle Procurement

2014
Background

Streamlined process offers cost advantages and simplicity for transit agencies

<table>
<thead>
<tr>
<th>Light-duty Bus</th>
<th>Small Vehicle</th>
<th>Medium-duty Bus</th>
</tr>
</thead>
<tbody>
<tr>
<td>Creative Bus Sales</td>
<td>Creative Bus Sales</td>
<td>National Bus Sales</td>
</tr>
<tr>
<td>StarTrans Senator II</td>
<td>MV-1</td>
<td>Glaval Entourage</td>
</tr>
</tbody>
</table>

Standardization of vehicle types and options
Progress

Executive Board approved vehicles and inspection services in July 2014

Preconstruction meetings September 8-12

Determined first vehicle order and finalized optional equipment in September
Upcoming

Watch for order confirmation letters and invoices for local match in September/October

Anticipate vehicle delivery in November 2014 – January 2015

Transit agency must provide proof of insurance and sign receipt of vehicles

Hold off on disposition of vehicles to be replaced and do not cannibalize vehicles
Planning for the Next Order

Opportunity to order vehicles in spring 2015 after FY 2014 and FY 2015 federal funds are available

Discuss vehicle funding needs with Sarah or Jamie for inclusion in your upcoming FY 2015 Program of Projects (POP)
Wrap-up

RESOURCES, TO DO LIST AND DISCUSSION
To Do – This Month

Work with Jamie / Sarah in advance of Oct. 1 submittal of FY 2015 POP

Submit Drug and Alcohol semi-annual reports, updated Title VI Programs and other agency policies

Staff will send vehicle order confirmations and we need your prompt reply

Let us know when to expect your invoice for September expenses
To Do – Next Month

Pick one point of contact at your agency for FY 2014 NTD Annual Report

Fill out the subgrantee survey to tell us what to focus on next year

Let us know if you need helping building or growing partnerships with cities, private sector, or nonprofits

Early next year, staff will ask you what needs to be updated in Access North Texas to help you meet your goals
Lean on Your Fellow Providers

Community Transit Services is new to the group

*Each provider is unique and has experience that can help*

City/County Transportation: working with city government
PTS: preventive maintenance program
SPAN: making the most of limited staff resources
STAR Transit: providing contracted services
TAPS: multi-media outreach
Questions, comments, discussion?