TPF TRANSPORTATION POOLED FUND

MANAGEMENT BEST PRACTICES FOR TPF STUDY LEAD AGENCY

The following suggested best practices are not mandatory when leading a TPF study.

PROJECT INITIATION

Begin Outreach

Prior to posting a solicitation, begin outreach efforts to identify potential partner organizations.

Brainstorm How to Communicate the New Solicitation

Discuss how the team will conduct outreach for the TPF study, especially early in the process.

Stakeholder Engagement

Engage stakeholders to garner support prior to posting a solicitation (such as emailing notifications, etc.).

Funding Threshold

Identify the appropriate minimum funding commitment required for each partner organization (i.e., a minimum of $5,000 per year for a 5-year TPF study).

SOLICITATION

Provide Information

In the solicitation, it helps to include the following information:

- Study methodology.
- Planned outcomes.
- Project scope.
- Suggested contribution.

Promote Solicitation

Promote and advertise the new solicitation to potential partners.

Support Partner Organization(s)

Provide support to partner organization(s) throughout the solicitation process.

FUND TRANSFER PROCESS

Timeline Length

Be aware that the fund transfer process can take more time than one might expect.

Email Contacts

After receiving the pooled fund study number, send an email that includes the official pooled fund study number and fund transfer instructinos to funding contacts.

Contact List

Maintain a list of partner organization contacts and individuals involved in the fund transfer process to provide any updates as needed.

Verify Accuracy

Verify that the acceptance memo and fund transfer information are correct.

PROJECT ADMINISTRATION

First Year Expectations

Sometimes, a TPF study's first year is focused on transferring funds to start the study, processing procurements, and selecting a contractor.

Technical Advisory Committee (TAC) Meetings

Conduct regular meetings with the TAC to ensure everyone receives the same information.

Kick-Off Meeting

Hold a kick-off meeting with your partner organizations to discuss the project scope and schedule as well as any logistical or administrative questions.

Lead Agency Team

Having a lead agency team with members that specialize in different aspects of the process (financial, administrative, etc.) can help to successfully conduct a TPF study.

Project Timeline

Be aware that a TPF study has a five year funding commitment duration.

Project Reporting

The TPF quarterly report provides current and future partners valuable information on a TPF study.

CLOSE OUT

Spreadsheet

Use the **closeout funding spreadsheet** to track commitments and transfers to facilitate an easier close out.

Final Meeting

Have a final meeting so all TAC members can discuss the project's methodology and results and to remind everyone to share information about the study.

Questions

For any other questions, trainings or frequently used resources please reference the TPF interactive website at www.pooledfund.org.

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