**Quarterly Progress Report for January 2020 through March 2020:**

<u>**Transportation Performance Management Pooled Fund Project**</u>

**Accomplishments:**

- Task 0: Pooled Fund Project Management and Communication
    - Developed Monthly Pooled Fund Newsletter. Sent January, February and March newsletters to pooled fund members.
    - Held monthly meetings with leadership team.
    - Responded to inquiries from members via the TPM mailbox.
- Task 1: TPM Information Clearinghouse
    - Continued to conduct maintenance.
    - Continued populating the site with resources.
- Tasks 2 and 3: TPM Knowledge Development and Knowledge Transfer
    - Produced third set of TPM Now! video series.
    - Developed MODA web-based training tool.
- Task 4: PM3 Web-Based Analytics Tool
    - Assisted in communicating TPM PM3 expanded dataset opportunity to pooled fund members and AMPO members.
    - There were a total of 50 MAP-21 related support requests:
        - Access questions/requests for more information: 28
        - Bugs/requests for extended support: 22
    - We spent a total of 81.5 customer support hours responding to these questions and/or maintaining and improving the tools.
    - Accounts
        - New account registrations in member states: 130
        - New DSAs from member states: 9
    - Contracting and New Services
        - The following agencies sent letters-of-commitment to became new members of Task 4:
            - Kentucky Transportation Cabinet (KYTC) – Base coverage only
            - Letters of Commitment are also expected during CY2020 Q1 for Option C (add additional services) for Arkansas DOT for Option C. We have had continued expressions of interest from Georgia DOT for Option C, but the LOC has not yet been received.
    - There are now 27 states receiving services through Task Four, plus one MPO.
- Task 5: Inclusion of National Performance Management in Benchmarking Website
    - Continue to maintain website.

**Anticipated Work:**

- Continue to provide communication and administration assistance to support pooled fund leadership group and technical advisory committee.
  - Host 2020 Q1 TPM Pooled Fund Member webinar.
  - Host monthly leadership calls.
  - Continue to communicate information through the TPM Pooled Fund Monthly Newsletter.
  - Continue to monitor TPM Pooled Fund mailbox and respond to inquiries.
- Continue to work on TPM Web Portal.
- Continue to provide Knowledge Management and Knowledge Transfer support
  - Develop proposed outline and approach for pilot online training sessions using TC3 platform. Provide to leadership team for input.
  - Assist with production of remaining TPM Now! Videos.
  - Conduct Kickoff Meeting for November Peer Exchange Planning Team.
  - Continue planning November Peer Exchange.
- Continue to support PM3 work.
- Work with contractors and FHWA to get national performance management data included in the benchmarking website.

**Problems and Issues:**

- None.

**<u>Attachments</u>**

- Spy Pond Partners 2020 Q1 Progress Report

# Memorandum

**To:** Matt Hardy, AASHTO
**From:** Lori Richter, Spy Pond Partners, LLC (SPP)
**Date:** March 16, 2020
**Re:** Status of SPP Progress on the TPM Pooled Fund

This memorandum summarizes the status of SPP's work on ASS17-0041 TPM Clearinghouse. The following sections summarize the progress from October 1, 2019 through February 29, 2020.

## Progress During the Reporting Period

The first major task completed over the reporting period was planning, delivery and support of the TPM Pooled Fund Peer Exchange, which took place November 14-15, 2019 in St. Paul Minnesota, and the subsequent publication of the Peer Exchange Summary Report.

There were five TPM management meetings over the period and one quarterly web call in January 2020, highlighting the November Peer Exchange. Members received five email updates over the period.

A number of significant updates and enhancements were incorporated into the TPM Portal over the period:

- Incorporating feedback from the fall 2019 FHWA-sponsored MODA Workshops into the MODAT multi-objective decision support web application through the TPM Portal,
- Publication of five *TPM Now!* videos,
- Incorporating enhancements, tagging and additional resources to the TPM calendar and events calendar, and
- Updating featured resources throughout the period.

The following tasks related to the portal have been completed and no additional work will be done on these items:
- Task 1. Document TPM Portal Functional Requirements
- Task 2. Document TPM Portal Organization
- Task 3. Document TPM Portal Structure and Layout
- Task 4. Develop Templates
- Task 6. Presentation
- Task 9. Admin and User Guides

Following is a summary of accomplishments by task. Note that this is the final reporting period for Tasks 1-11.

### Task 5. Tag Resources
As part of this task the project team added resources (events, publications, TPM Pooled Fund documents, and state DOT examples).

### Task 7. Portal Development
As part of this task the project team completed additional MODAT web development, including incorporating workshop feedback into the MODAT tool.

### Task 8. Portal Support
As part of this task the project team posted resources including additional TPM Now! videos and the TPM Peer Exchange Summary Report to the portal.

### Task 10. Pooled Fund Management Support
As part of this task the project team performed the following activities:

- Hosted monthly TPM Pooled Fund Management meetings
- Distributed monthly TPM Pooled Fund newsletters
- Completed Pooled Fund Peer Exchange planning and delivery
- Completed the Peer Exchange Summary Report

### Task 11. TPM Portal Benchmarking Enhancements
No work was performed on this task.

## Unanticipated Problems and Proposed Resolution
None.

## Anticipated Progress in the Next Report Period

Going forward, progress will be only reported on the new Tasks 12-16. Also, because of the increase in pooled fund activities, progress will be reported monthly. The following work is anticipated for March 2020:

### Task 12. TPM Pooled Fund Management and Communication
- One quarterly web call (agenda, meeting materials, notes)
- One monthly management team meeting (agenda and notes)
- One status update
- One monthly newsletter/email update
- Develop TPM Pooled Fund dashboard
- Planning meeting in Boston on March 12, 2020

### Task 13. TPM Information Clearinghouse
- Keep portal updated with new information
- Planning for AASHTO Transportation Management, site integration
- Development of TPM Training Hub

- Support TPM Portal and its users through enhancement of portal functionality and features to meet user requirements
- Build new resources to support TPM advancements
- Additional site updates as needed

## Task 14. TPM Knowledge Development and Transfer

*Sub-Task 14.1 Develop Training Roadmap*

- Review existing performance-management related training materials, including training courses, guidance documents, webinars and other related materials
- Identify gaps where a needed competency is not well-addressed by available resources

*Sub-Task 14.2 Prepare Training Action Plan*

No work is planned for this task over the next period.

*Sub-Task 14.3 Prepare Pilot Online Training*

- Begin work on MODA Overview pilot online training

## Task 15. Comparative Benchmarking Support

- Support services that respond to ongoing support and additional minor bug fixes

## Task 16. Transportation Asset Management (TAM) Webinars and Peer Exchanges

- Planning for April 2020 webinar
- Planning for July 2020 peer exchange

## Budget Status

SPP's budget for the project is $1,312,808.00. We are invoicing $110,907.50 for this project. The cumulative amount invoiced is $450,134.28 and the remaining budget is $862,673,72.