FY2008
New Grantee Workshop
(Part 1)

Federal Transit Administration

U.S. Department of Transportation

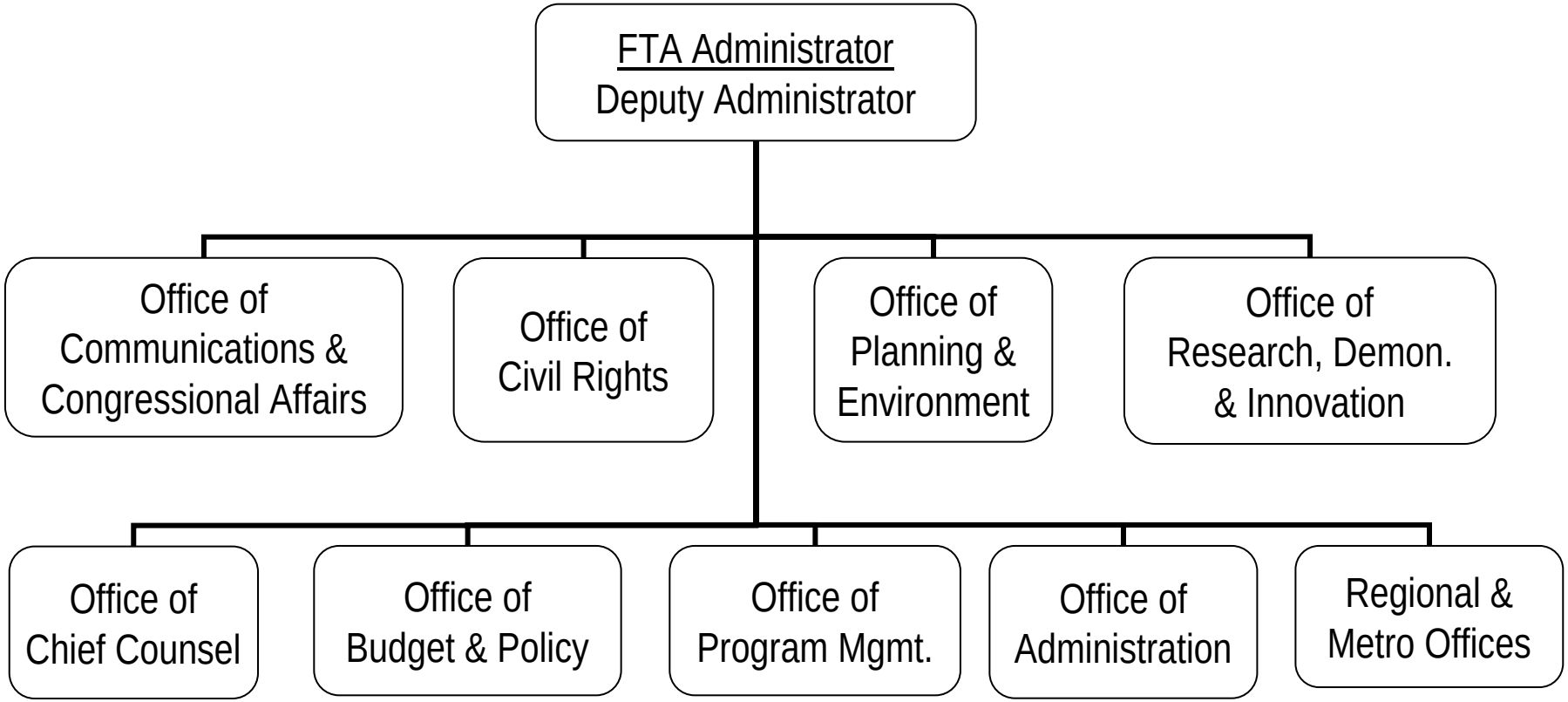
Washington, DC

Overview

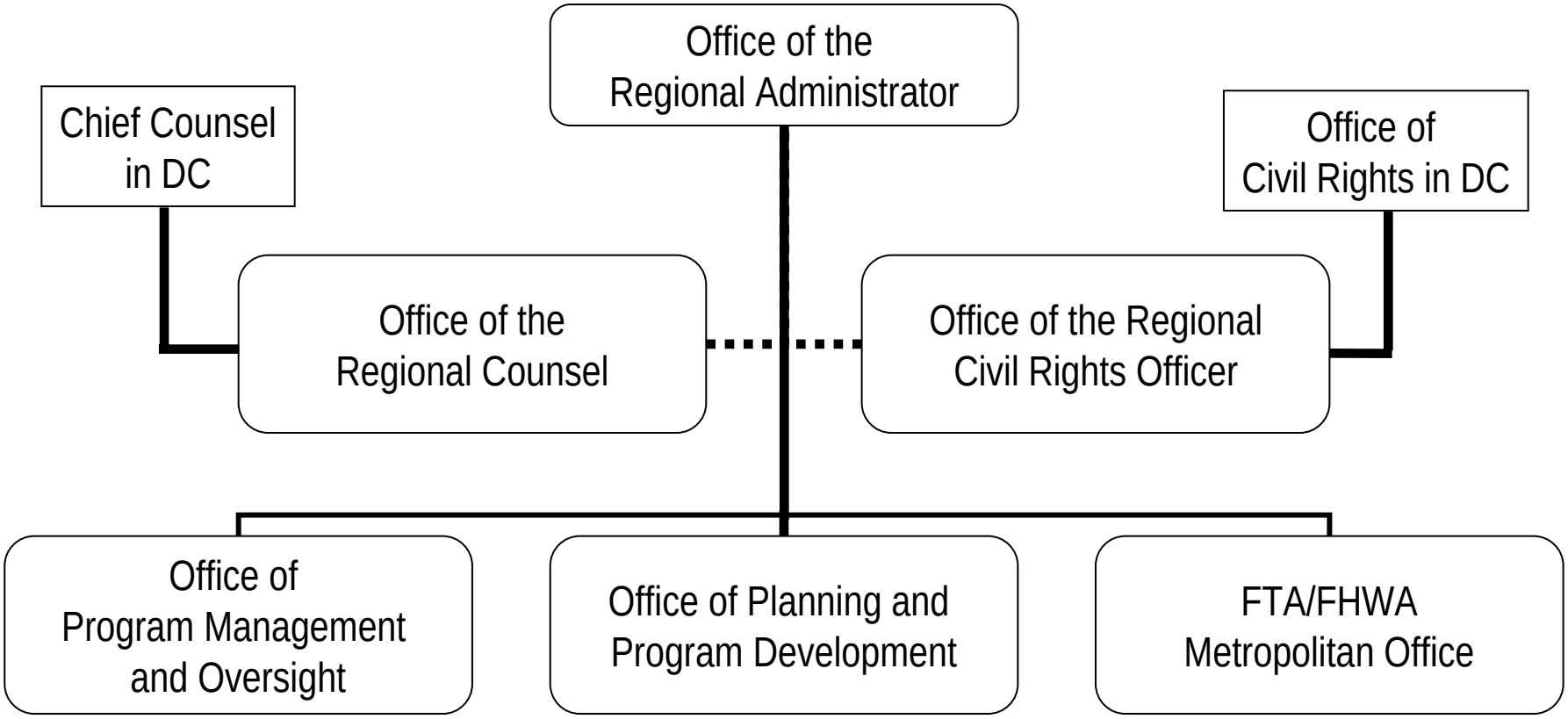
Workshop Objectives

- Provide an overview
  - FTA and its programs
  - Grant application process
  - Grant management
  - FTA resources
  - Triennial Review process
- Answer your questions

FTA Organization



Regional Office Organization



FTA Grant Programs

- Section 5307 – Urbanized Area Formula Program
- Section 5309 – Capital Program
- Section 5310 – Elderly Individuals and Individuals with Disabilities Program
- Section 5311 – Nonurbanized Area Formula Program
- Section 5316 – Job Access and Reverse Commute Program
- Section 5317 – New Freedom Program

FTA Grant Programs

- Section 5320 – Transit in the Parks Discretionary
- Section 5308 – Clean Fuels Grant Program
- Section 5303 – Metropolitan Planning
- Section 5304 – Statewide Planning
- Section 5305 – Planning Programs
- Section 5339 – Alternative Analysis

Section 5307

- Apportioned to eligible public entities
  - Governors' apportionment
  - Large urban apportionment
- Are available the year apportioned plus 3
- Used for public transportation activities
  - Planning projects
  - Capital projects
  - Operating expenses (small urban areas only)

Section 5307

- Capital: 80/20
- CAA Amendments Compliance and ADA
  - Equipment only: 90/10
  - Rolling stock with equipment: 83/17
- Bicycle-to-Transit Access: 90/10
- Planning: 80/20
- Operating Assistance: 50/50

Eligible Section 5307 Capital Projects

- Rolling stock
- Facilities
- Preventive maintenance
- ADA complementary paratransit operations
- Contracting
- Transit enhancement projects
- Security plans, drills, and training

Section 5307 Local Share

- Cash (or in-kind contribution)
- Non-Federal funds
- Certain Federal funds (e.g., non-DOT funds)
- Contract revenue from state or local social service organizations
- Non-farebox revenues from transit operations (e.g., advertising and concession revenues)
- Real property integral to the project
- Toll credits

Flex Funds

- Highway funds that can be used for transit
  - Surface Transportation Funds (STP)
  - Congestion Mitigation and Air Quality Improvement (CMAQ)
- Used for non-operating purposes
- Administered in accordance with 5307 requirements

Section 5309

- Awarded as earmarks to public entities
- Period of Availability
  - Year of apportionment plus 2 for bus/new starts
  - Year of apportionment plus 3 for fixed guideway modernization
- Eligible Projects
  - Bus and bus-related facilities
  - Rail modernization
  - New fixed-guideway systems and extensions

Section 5309

- Funding Ratios
  - New/small starts: capped at 80/20 but varies depending on project size and other factors
  - Bus and bus-related facilities: 80/20

Section 5309

- Local share can include:
  - Cash (or in-kind contribution)
  - Non-Federal funds
  - Certain Federal funds (e.g., non-DOT funds)
  - Non-farebox revenues from transit operations (e.g., advertising and concession revenues)
  - Real property integral to the project
  - Toll credits

Oversight Activities

- Annual Grantee Assessment
  - Performed by the regional offices
  - Determines level of oversight
- Assessment Areas
  - Grant Administration
  - Grantee Profile
  - Property Management
  - Financial Management
  - Procurement Management

Oversight Activities

- Assessment Areas (continued)
  - Technology Deployment
  - Safety and Security
  - Planning
  - Civil Rights
- Results
  - Low, medium or high rating
  - Specialty reviews

Oversight Activities

- General Reviews
  - Triennial Review
    - Conducted of recipients of 5307 funds
    - Mandated by law
  - State Management Review
    - Conducted of states and territories
    - Addresses 5309, 5310, 5311, 5316 and 5317 requirements
- Program Specific Reviews
  - Procurement System
  - Financial Management

Oversight Activities

- Safety and Security
  - Drug and Alcohol Program
  - Security – Readiness Assessment
  - State Safety
- Civil Rights
  - Americans with Disabilities Act (ADA)
    - Key Station
    - Fixed Route
    - Complementary Paratransit
  - Disadvantaged Business Enterprise
  - Equal Employment Opportunity (EEO)
  - Title VI

Oversight Activities

- Project Level Reviews
  - Project Management Oversight
  - Financial Capacity

Program Management Systems

- Transportation Electronic Award and Management System (TEAM-Web)
- Electronic Clearing House Operation (ECHO)
- National Transit Database (NTD)
- Drug and Alcohol Management Information System (DAMIS)
- Oversight Tracking System (OTrak)
- Accounting System (Adelphi)

Grant Planning

Grant Program Prerequisites

- Legal Authority
- Authorizing Resolution
- Certifications and Assurances
- Program of Projects
- Planning Processes
  - Local Transportation Improvement Plan
  - Statewide Transportation Improvement Plan
  - Unified Planning Work Program

Grant Program Prerequisites

- Environmental Analysis
  - Categorical Exclusions
  - Environmental Assessment
  - Environmental Impact Statements
- Section 106 Historic Properties and Parklands
- Other Environmental Requirements

TEAM-Web

- File annual certifications and assurances
- Apply for grants
- Report progress and expenditures
- Manage FTA funding

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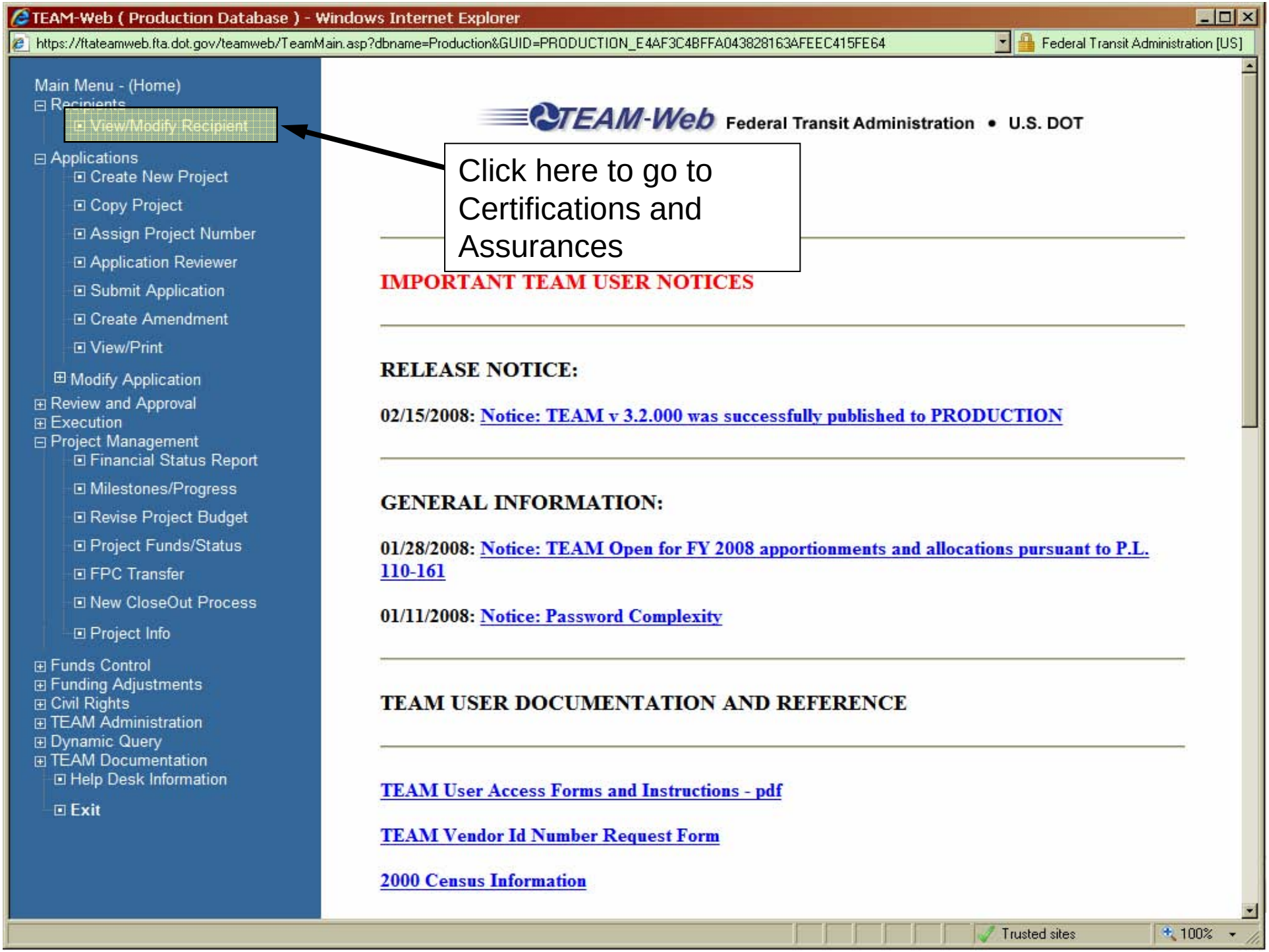
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IMPORTANT TEAM USER NOTICES
RELEASE NOTICE:
02/15/2008: Notice: TEAM v 3.2.000 was successfully published to PRODUCTION
GENERAL INFORMATION:
01/28/2008: Notice: TEAM Open for FY 2008 apportionments and allocations pursuant to P.L. 110-161
01/11/2008: Notice: Password Complexity
TEAM USER DOCUMENTATION AND REFERENCE
TEAM User Access Forms and Instructions - pdf
TEAM Vendor Id Number Request Form
2000 Census Information
Trusted sites
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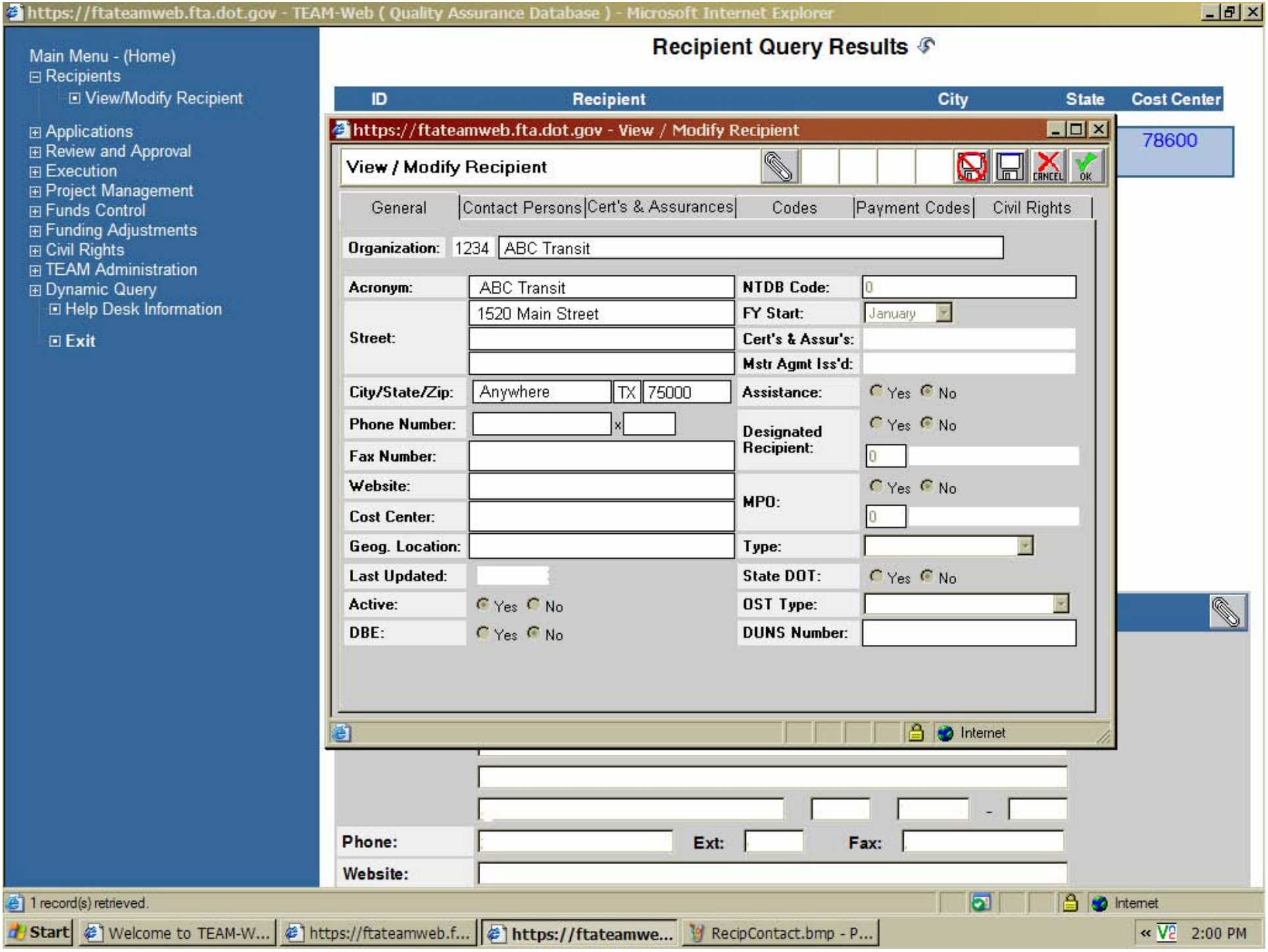
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Acronym: ABC Transit
Street: 1520 Main Street
City/State/Zip: Anywhere TX 75000
Phone Number:
Fax Number:
Website:
Cost Center:
Geog. Location:
Last Updated:
Active: Yes No
DBE: Yes No
NTDB Code: 0
FY Start: January
Cert's & Assur's:
Mstr Agmt Iss'd:
Assistance: Yes No
Designated Recipient: Yes No
MPO: Yes No
Type:
State DOT: Yes No
OST Type:
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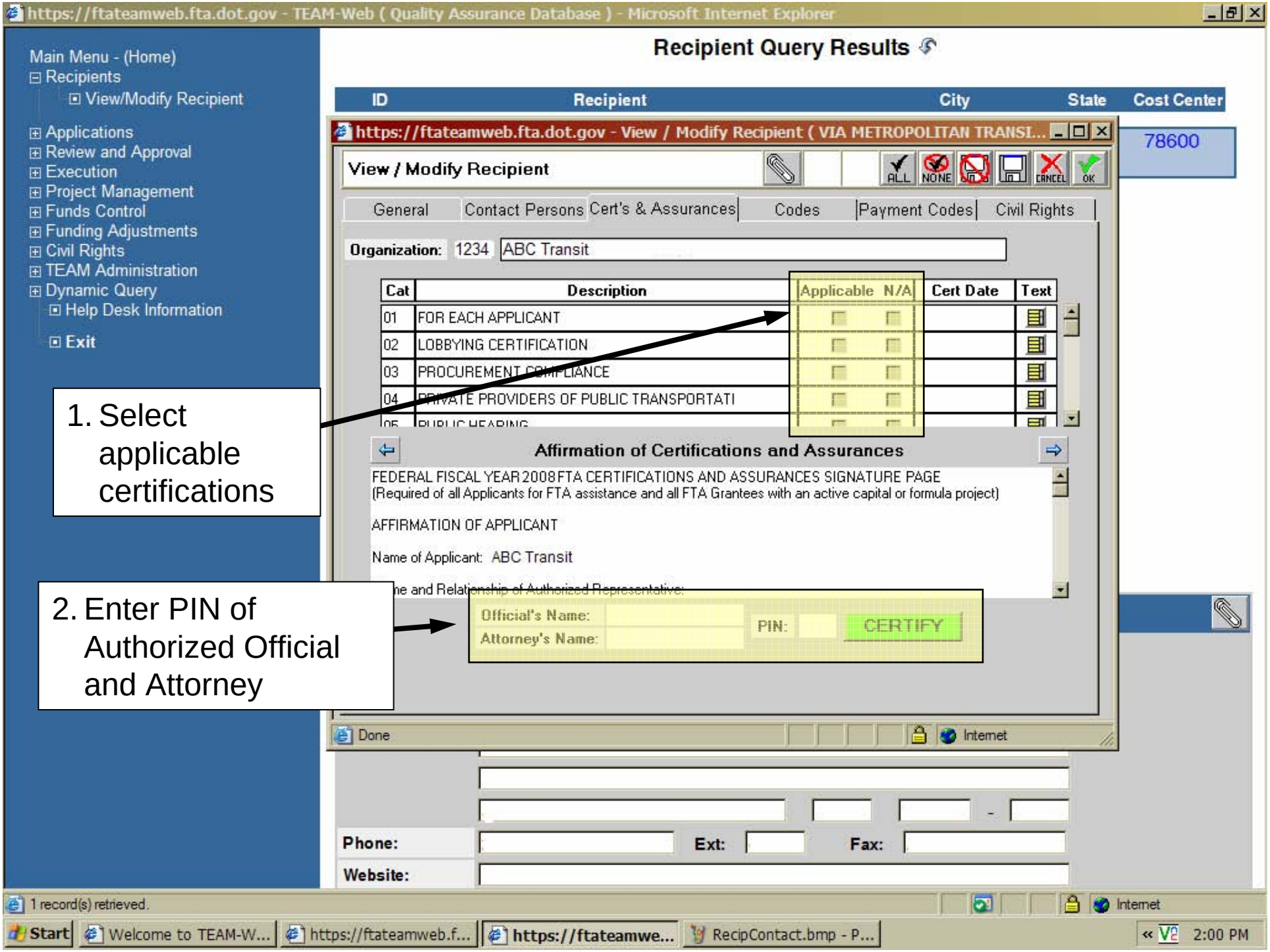


1. Select applicable certifications

2. Enter PIN of Authorized Official and Attorney

Grant Application

Sample Agency Description

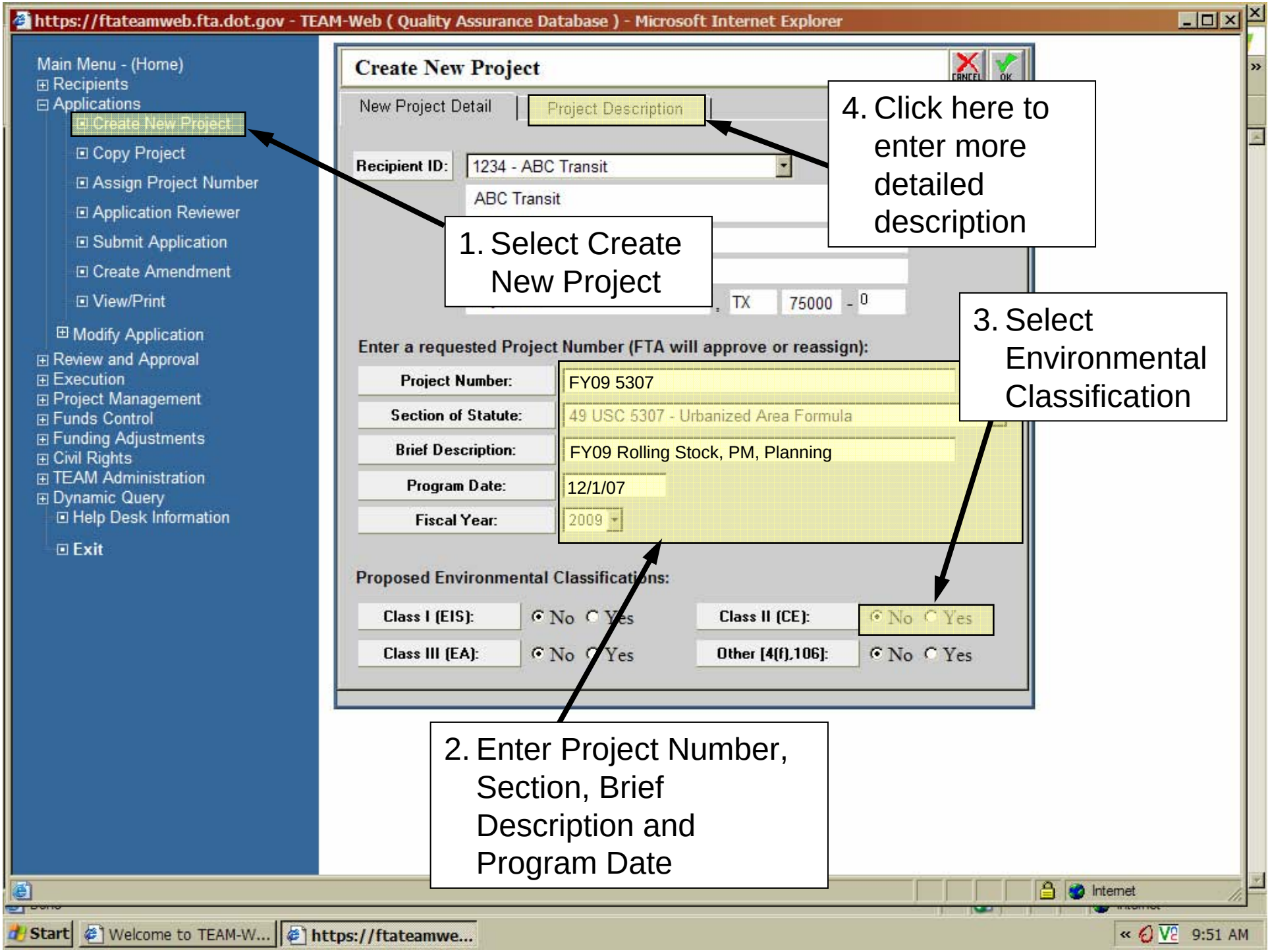
- ABC Transit
  - Population: 85,000
  - Number of vehicles: 50 total, 42 peak
  - Type of agency: transit authority
- Agency Needs
  - Rolling stock (bus) purchase
  - Preventive maintenance
  - Planning

ABC's Grant Projects & Budgets

- Available 5307 funds: $858,750
- Rolling stock (bus) purchase
  - Expansion: two 40-foot buses
  - Total Cost - $625,000; FTA Amount - $518,750
- Preventive maintenance
  - Total Cost - $375,000; FTA Amount - $300,000
- Planning
  - Total Cost - $50,000; FTA Amount - $40,000

Grant Application

- FTA Circular 9030.1C
- Application Process – TEAM-Web
  - Project Information
  - Budget
  - Milestones
  - Environmental Findings
  - Fleet Status
  - Security
  - Description for Earmarks
  - FTA Review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Funding Adjustments
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Create New Project
CANCEL
OK
New Project Detail
Project Description
Recipient ID:
1234 - ABC Transit
ABC Transit
TX
75000
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Enter a requested Project Number (FTA will approve or reassign):
Project Number:
FY09 5307
Section of Statute:
49 USC 5307 - Urbanized Area Formula
Brief Description:
FY09 Rolling Stock, PM, Planning
Program Date:
12/1/07
Fiscal Year:
2009
Proposed Environmental Classifications:
Class I (EIS):
No
Yes
Class II (CE):
No
Yes
Class III (EA):
No
Yes
Other [4(f),106]:
No
Yes
1. Select Create New Project
2. Enter Project Number, Section, Brief Description and Program Date
3. Select Environmental Classification
4. Click here to enter more detailed description
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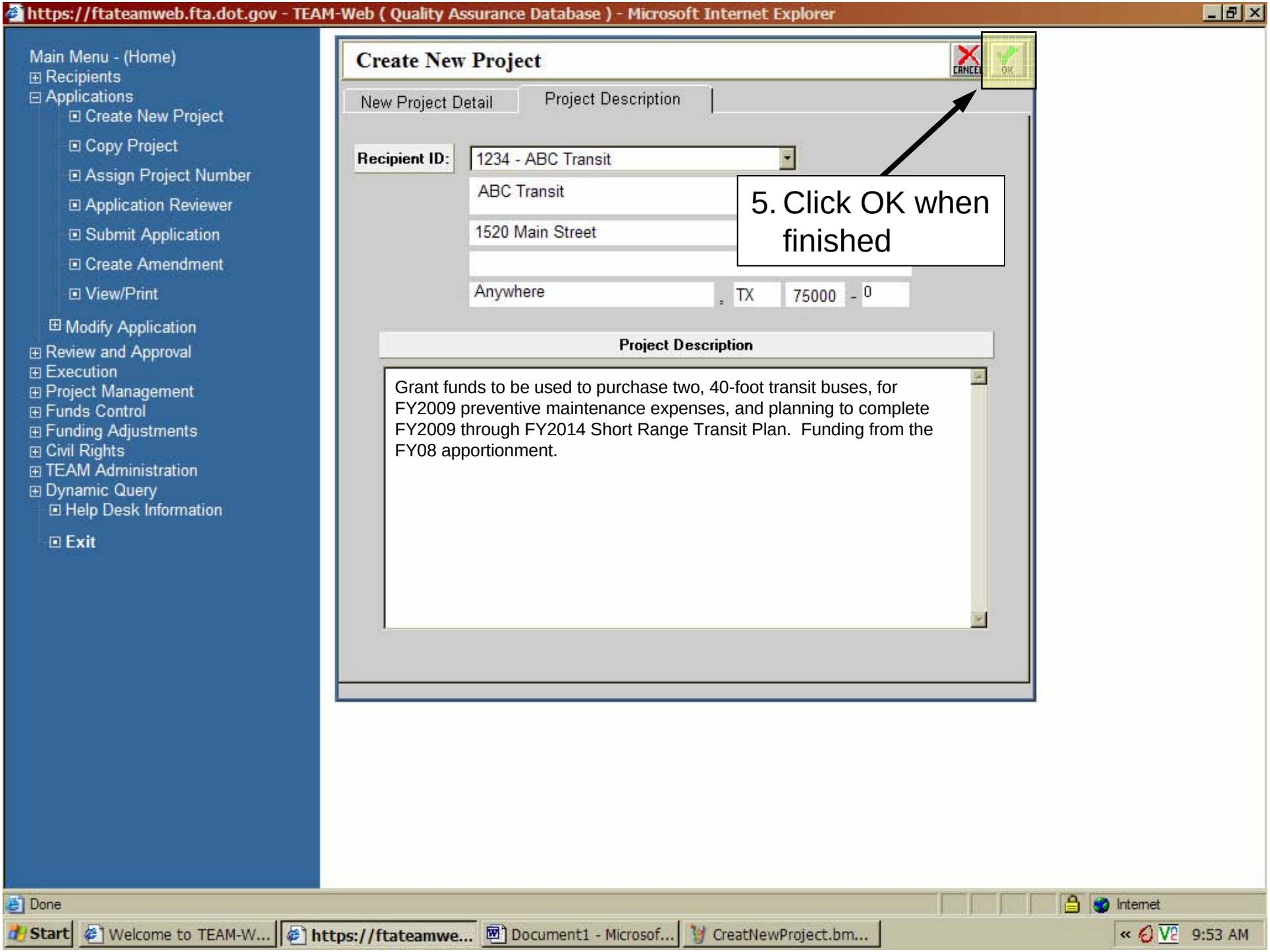
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CANCEL
OK
New Project Detail
Project Description
Recipient ID:
1234 - ABC Transit
ABC Transit
1520 Main Street
Anywhere
TX
75000
0
5. Click OK when finished
Project Description
Grant funds to be used to purchase two, 40-foot transit buses, for FY2009 preventive maintenance expenses, and planning to complete FY2009 through FY2014 Short Range Transit Plan. Funding from the FY08 apportionment.
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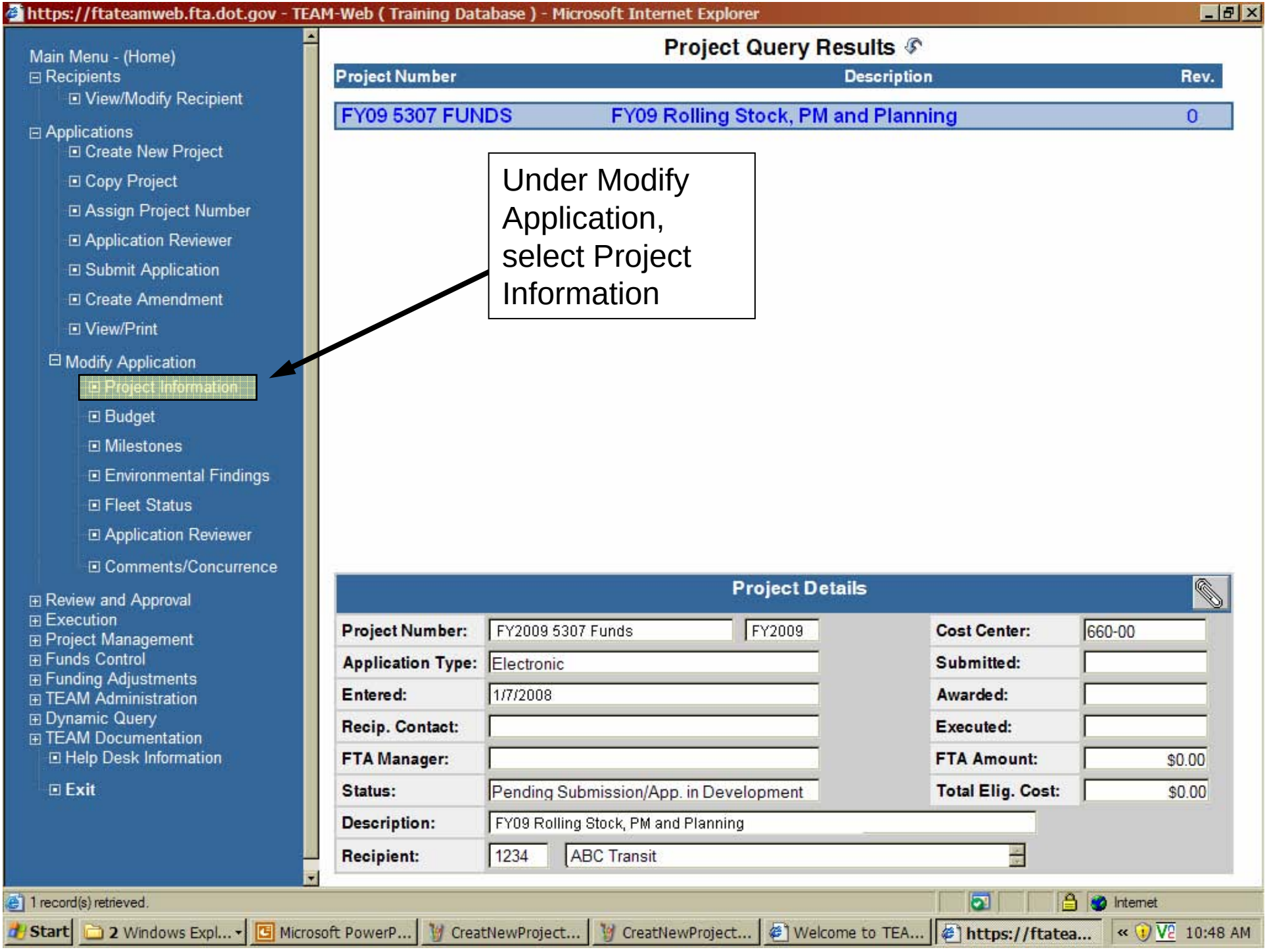
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Under Modify Application, select Project Information
Project Details
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FY2009 5307 Funds
FY2009
Application Type:
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Entered:
1/7/2008
Recip. Contact:
FTA Manager:
Status:
Pending Submission/App. in Development
Description:
FY09 Rolling Stock, PM and Planning
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ABC Transit
Cost Center:
660-00
Submitted:
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Executed:
FTA Amount:
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Total Elig. Cost:
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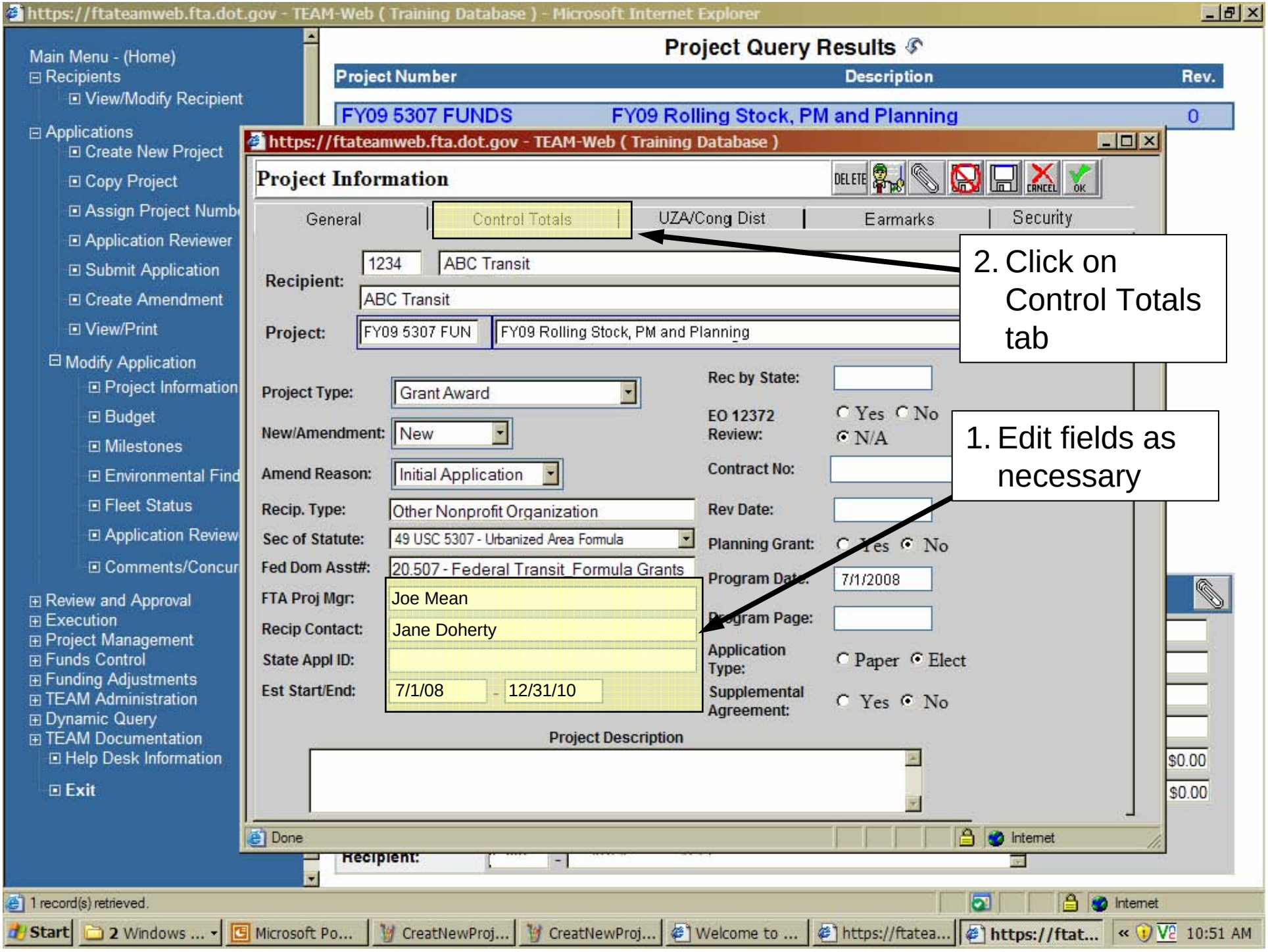
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Project Type:
Grant Award
New/Amendment:
New
Amend Reason:
Initial Application
Recip. Type:
Other Nonprofit Organization
Sec of Statute:
49 USC 5307 - Urbanized Area Formula
Fed Dom Asst#:
20.507 - Federal Transit_Formula Grants
FTA Proj Mgr:
Joe Mean
Recip Contact:
Jane Doherty
State Appl ID:
Est Start/End:
7/1/08
12/31/10
Rec by State:
EO 12372 Review:
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No
N/A
Contract No:
Rev Date:
Planning Grant:
Yes
No
Program Date:
7/1/2008
Program Page:
Application Type:
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Elect
Supplemental Agreement:
Yes
No
Project Description
2. Click on Control Totals tab
1. Edit fields as necessary
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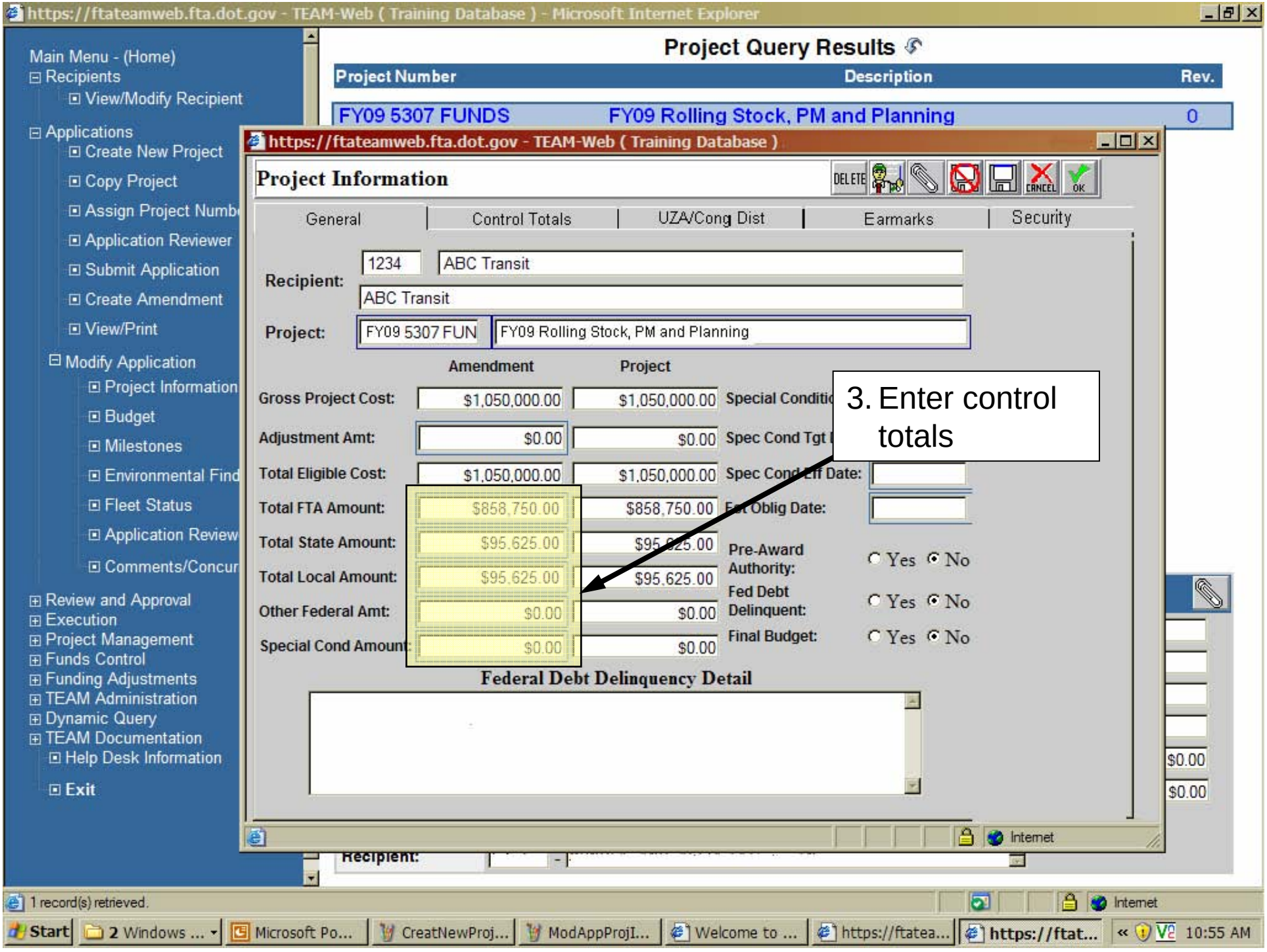
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Amendment
Project
Gross Project Cost:
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$1,050,000.00
Adjustment Amt:
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$0.00
Total Eligible Cost:
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$1,050,000.00
Total FTA Amount:
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$858,750.00
Total State Amount:
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$95,625.00
Total Local Amount:
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$95,625.00
Other Federal Amt:
$0.00
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Special Cond Amount:
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Pre-Award Authority:
Yes
No
Fed Debt Delinquent:
Yes
No
Final Budget:
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Federal Debt Delinquency Detail
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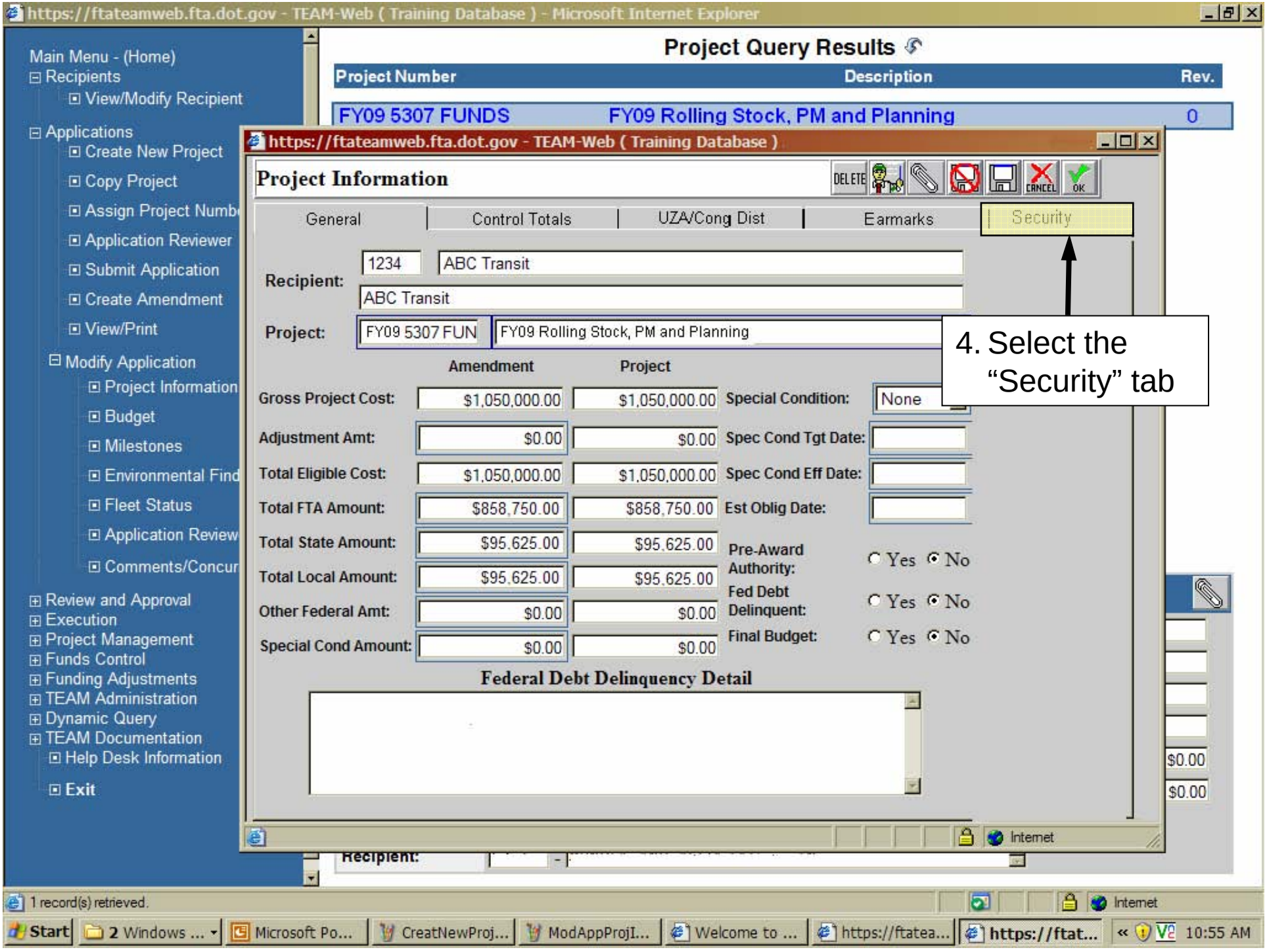
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Adjustment Amt:
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Total Eligible Cost:
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$1,050,000.00
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Total FTA Amount:
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$858,750.00
Est Oblig Date:
Total State Amount:
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$95,625.00
Pre-Award Authority:
Yes
No
Total Local Amount:
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$95,625.00
Fed Debt Delinquent:
Yes
No
Other Federal Amt:
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$0.00
Final Budget:
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No
Special Cond Amount:
$0.00
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Federal Debt Delinquency Detail
4. Select the "Security" tab
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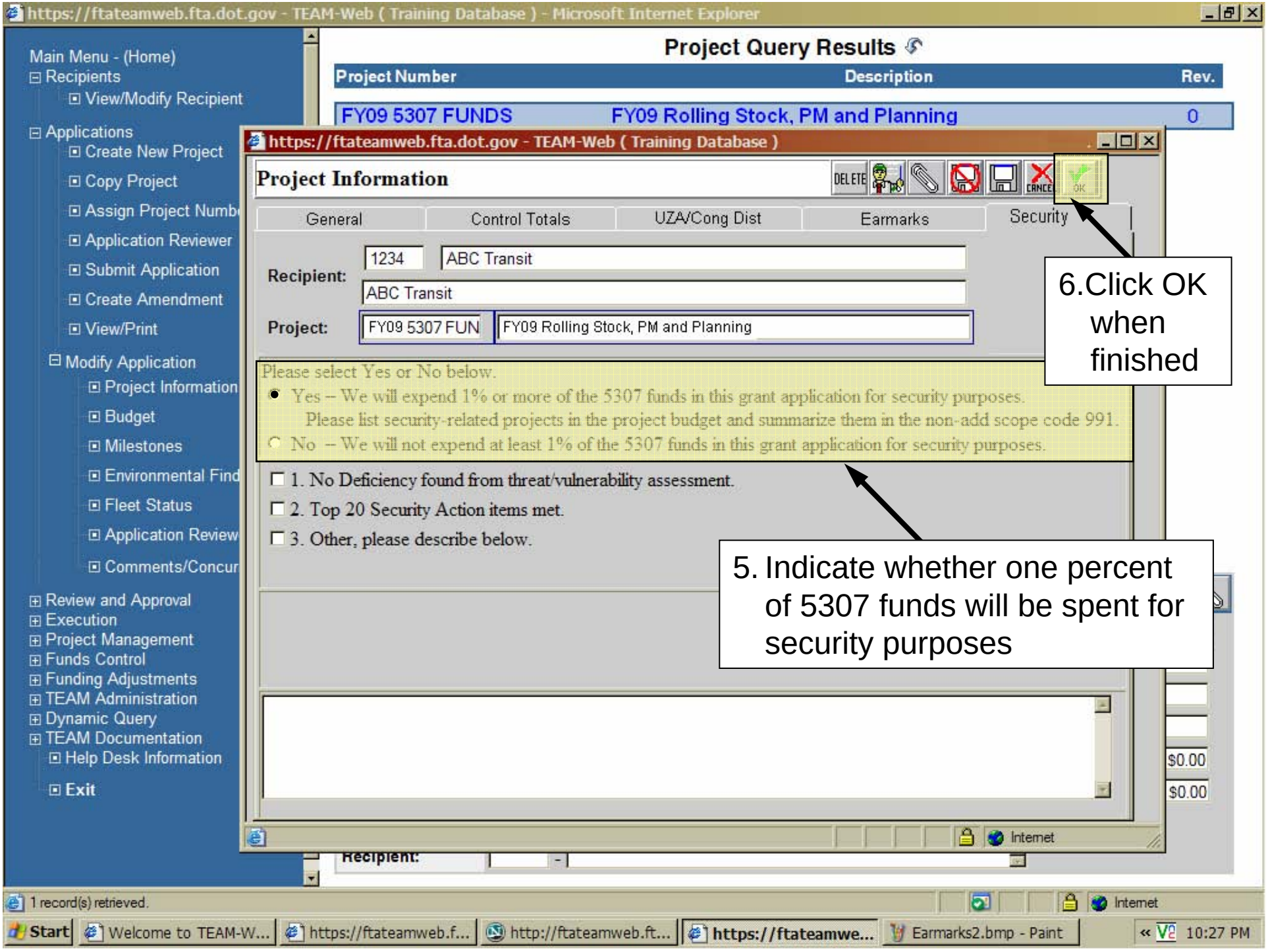
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OK
General
Control Totals
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Earmarks
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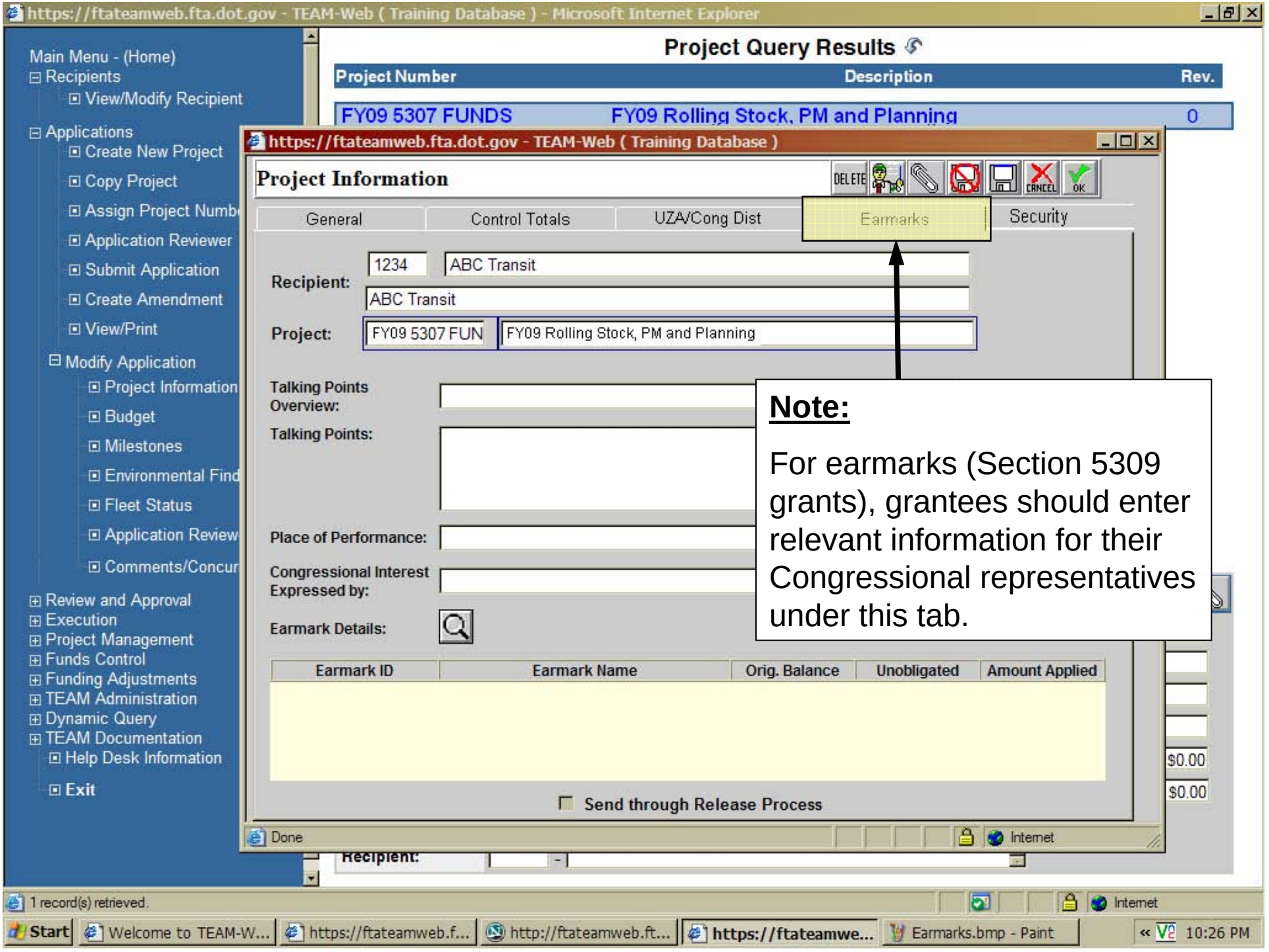
ABC Transit
ABC Transit
Project:
FY09 5307 FUN
FY09 Rolling Stock, PM and Planning
Please select Yes or No below.
Yes – We will expend 1% or more of the 5307 funds in this grant application for security purposes.
Please list security-related projects in the project budget and summarize them in the non-add scope code 991.
No – We will not expend at least 1% of the 5307 funds in this grant application for security purposes.
1. No Deficiency found from threat/vulnerability assessment.
2. Top 20 Security Action items met.
3. Other, please describe below.
6.Click OK when finished
5. Indicate whether one percent of 5307 funds will be spent for security purposes
$0.00
$0.00
Internet
Recipient:
1 record(s) retrieved.
Internet
Start
Welcome to TEAM-W...
https://ftateamweb.f...
http://ftateamweb.ft...
https://ftateamwe...
Earmarks2.bmp - Paint
10:27 PM


https://ftateamweb.fta.dot.gov - TEAM-Web (Training Database) - Microsoft Internet Explorer
Main Menu - (Home)
Recipients
View/Modify Recipient
Applications
Create New Project
Copy Project
Assign Project Numb
Application Reviewer
Submit Application
Create Amendment
View/Print
Modify Application
Project Information
Budget
Milestones
Environmental Find
Fleet Status
Application Review
Comments/Concur
Review and Approval
Execution
Project Management
Funds Control
Funding Adjustments
TEAM Administration
Dynamic Query
TEAM Documentation
Help Desk Information
Exit
Project Query Results
Project Number
Description
Rev.
FY09 5307 FUNDS
FY09 Rolling Stock, PM and Planning
0
https://ftateamweb.fta.dot.gov - TEAM-Web (Training Database)
Project Information
DELETE
CANCEL
OK
General
Control Totals
UZA/Cong Dist
Earmarks
Security
Recipient:
1234
ABC Transit
ABC Transit
Project:
FY09 5307 FUN
FY09 Rolling Stock, PM and Planning
Talking Points Overview:
Talking Points:
Place of Performance:
Congressional Interest Expressed by:
Earmark Details:
Earmark ID
Earmark Name
Orig. Balance
Unobligated
Amount Applied
Send through Release Process
Done
Internet
Note:
For earmarks (Section 5309 grants), grantees should enter relevant information for their Congressional representatives under this tab.
$0.00
$0.00
Recipient:
1 record(s) retrieved.
Internet
Start
Welcome to TEAM-W...
https://ftateamweb.f...
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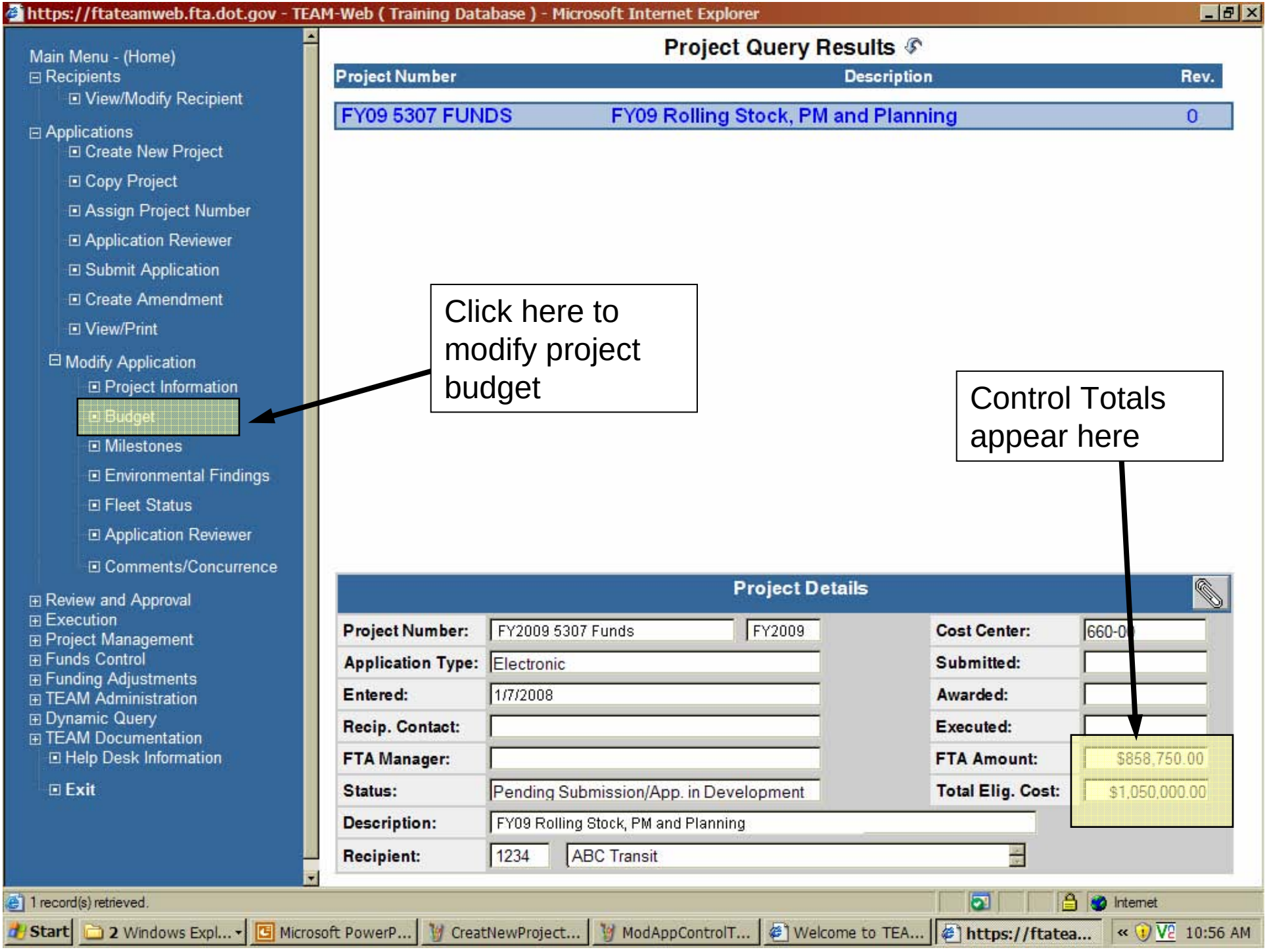
https://ftateamwe...
Earmarks.bmp - Paint
10:26 PM


https://ftateamweb.fta.dot.gov - TEAM-Web (Training Database) - Microsoft Internet Explorer
Main Menu - (Home)
Recipients
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Application Reviewer
Submit Application
Create Amendment
View/Print
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Milestones
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Application Reviewer
Comments/Concurrence
Review and Approval
Execution
Project Management
Funds Control
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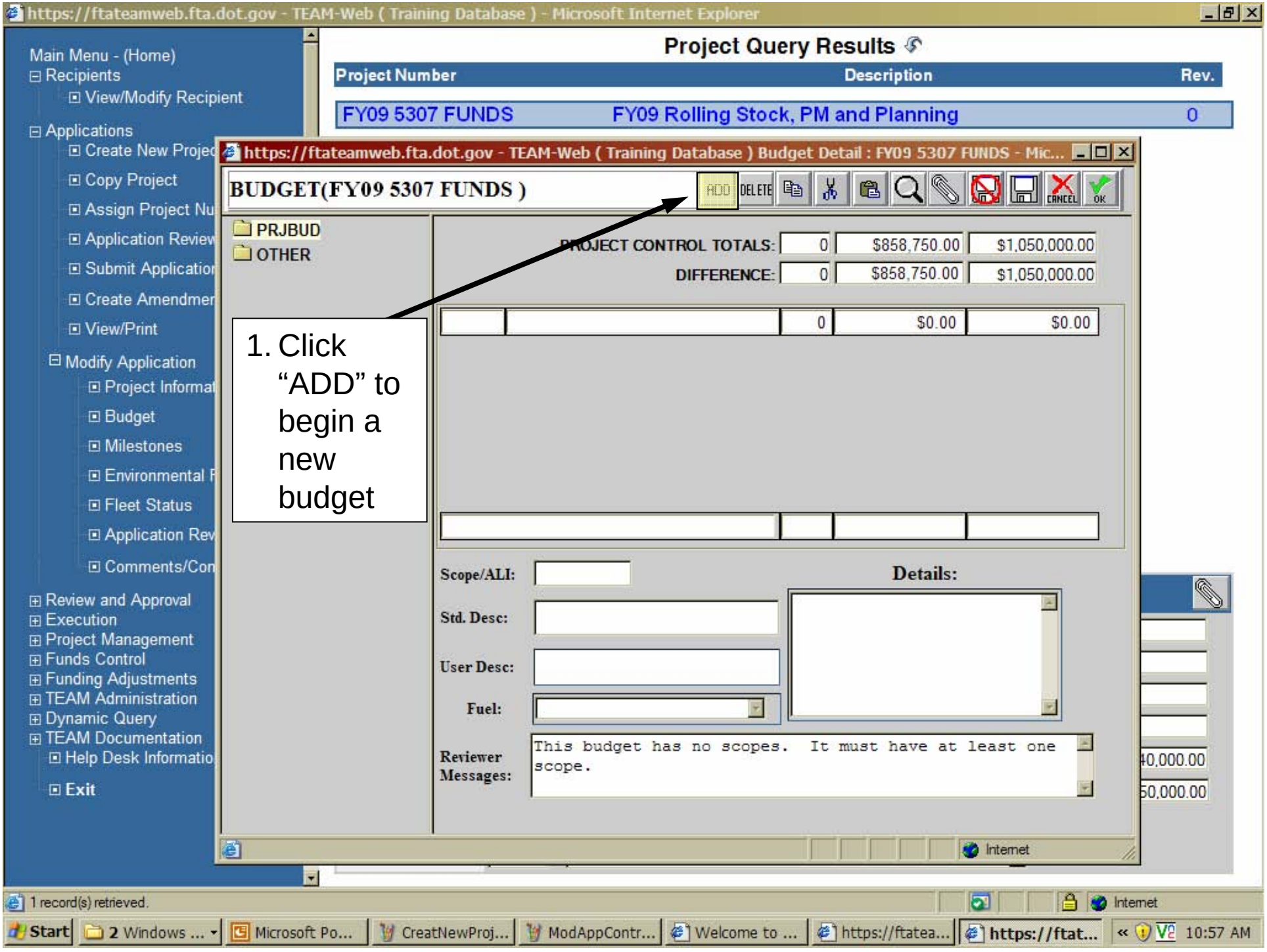
TEAM Administration
Dynamic Query
TEAM Documentation
Help Desk Information
Exit
Project Query Results
Project Number
Description
Rev.
FY09 5307 FUNDS
FY09 Rolling Stock, PM and Planning
0
Click here to modify project budget
Control Totals appear here
Project Details
Project Number:
FY2009 5307 Funds
FY2009
Application Type:
Electronic
Entered:
1/7/2008
Recip. Contact:
FTA Manager:
Status:
Pending Submission/App. in Development
Description:
FY09 Rolling Stock, PM and Planning
Recipient:
1234
ABC Transit
Cost Center:
660-0
Submitted:
Awarded:
Executed:
FTA Amount:
$858,750.00
Total Elig. Cost:
$1,050,000.00
1 record(s) retrieved.
Internet
Start
2 Windows Expl...
Microsoft PowerP...
CreatNewProject...
ModAppControlT...
Welcome to TEA...
https://ftatea...
10:56 AM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TEAM Documentation
Help Desk Informatio
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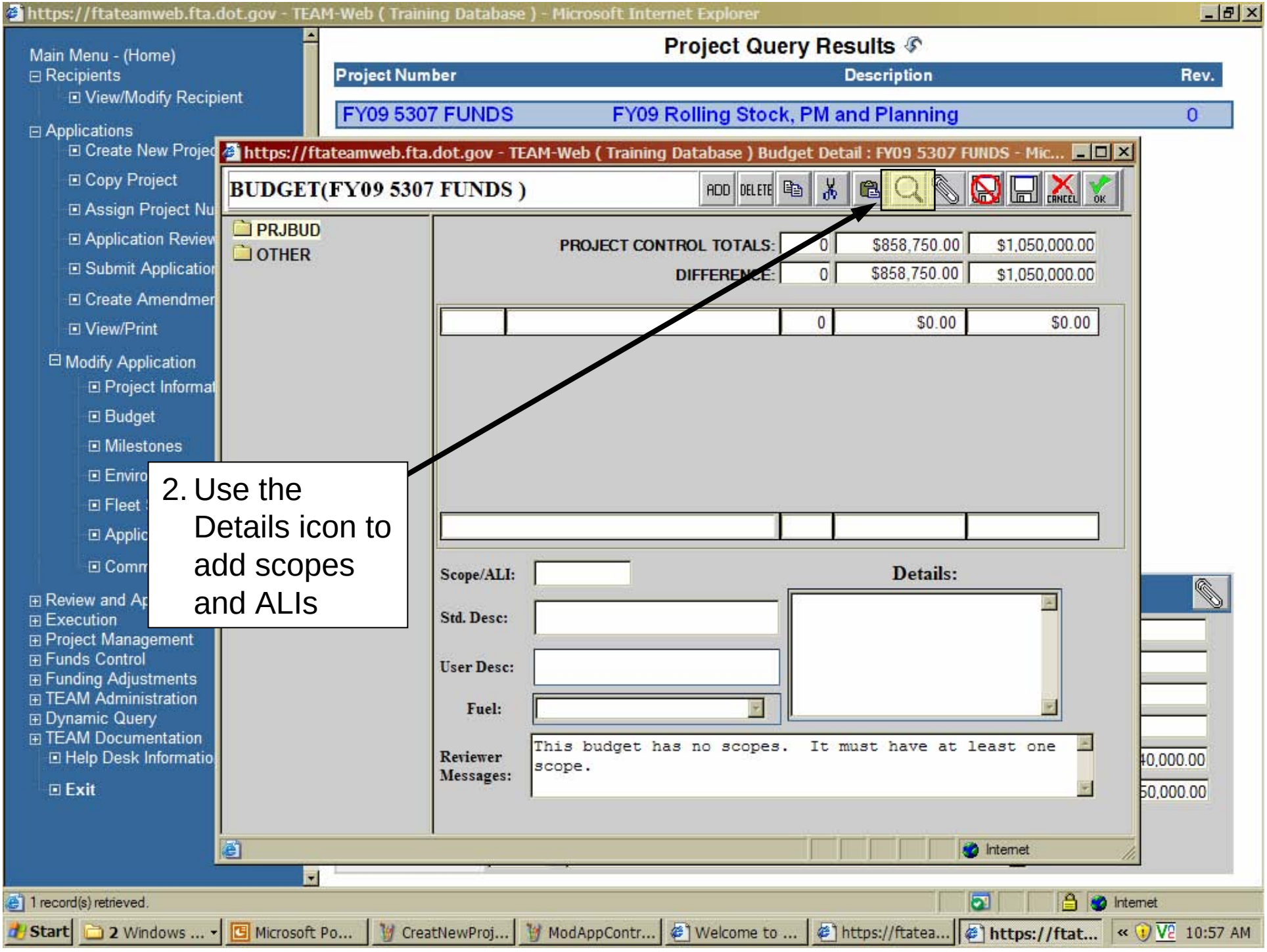
Project Query Results
Project Number
Description
Rev.
FY09 5307 FUNDS
FY09 Rolling Stock, PM and Planning
0
https://ftateamweb.fta.dot.gov - TEAM-Web (Training Database) Budget Detail : FY09 5307 FUNDS - Mic...
BUDGET(FY09 5307 FUNDS)
ADD
DELETE
CANCEL
OK
PRJBUD
OTHER
PROJECT CONTROL TOTALS:
DIFFERENCE:
$858,750.00
$1,050,000.00
$0.00
Scope/ALI:
Details:
Std. Desc:
User Desc:
Fuel:
Reviewer Messages:
This budget has no scopes. It must have at least one scope.
1. Click "ADD" to begin a new budget
Internet
1 record(s) retrieved.
Start
2 Windows ...
Microsoft Po...
CreatNewProj...
ModAppContr...
Welcome to ...
https://ftatea...
https://ftat...
10:57 AM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Main Menu - (Home)
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Project Number
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FY09 5307 FUNDS
FY09 Rolling Stock, PM and Planning
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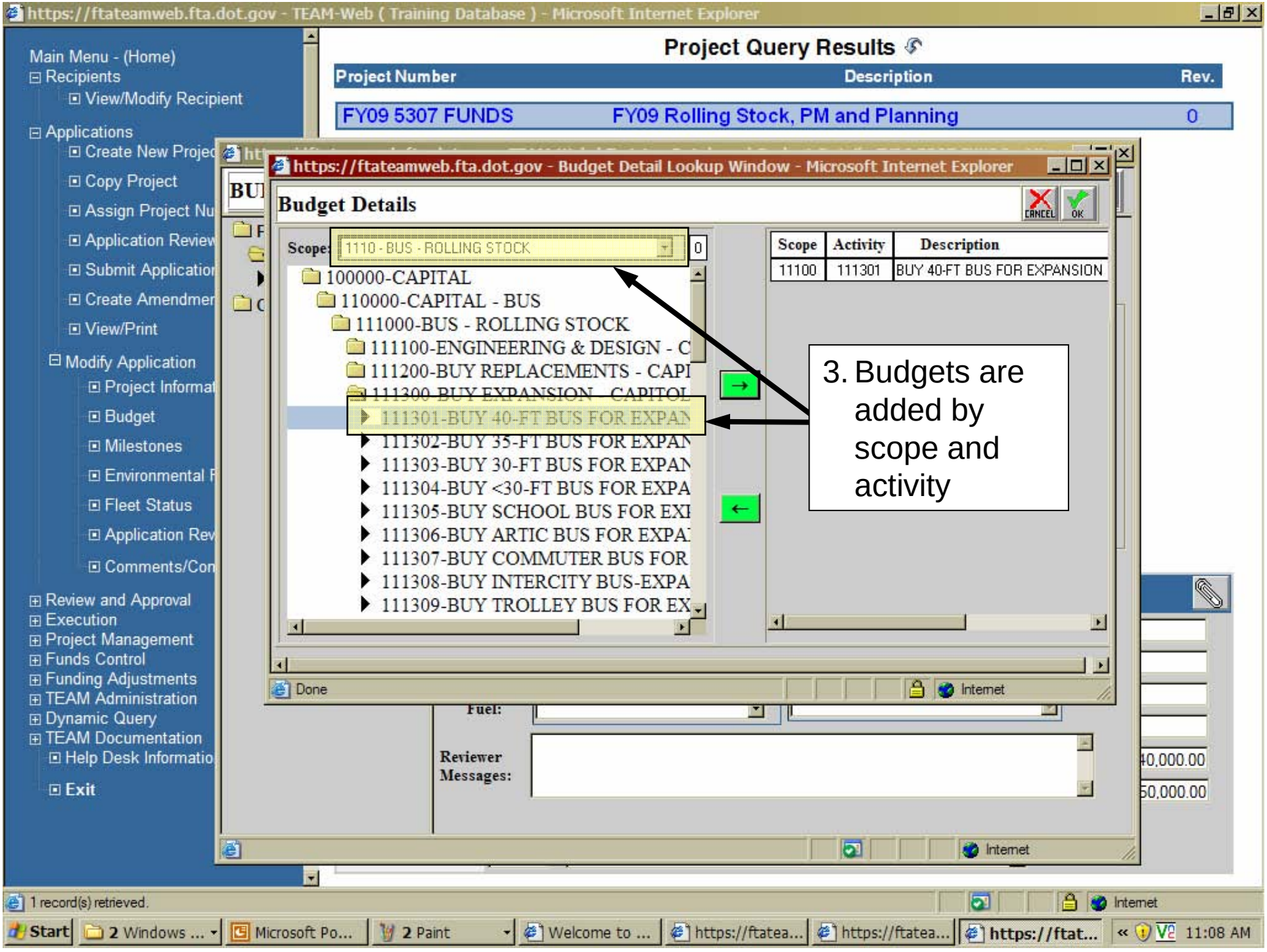
https://ftateamweb.fta.dot.gov - TEAM-Web (Training Database) Budget Detail : FY09 5307 FUNDS - Mic...
BUDGET(FY09 5307 FUNDS)
ADD
DELETE
CANCEL
OK
PRJBUD
OTHER
PROJECT CONTROL TOTALS:
DIFFERENCE:
0
$858,750.00
$1,050,000.00
$0.00
Scope/ALI:
Details:
Std. Desc:
User Desc:
Fuel:
Reviewer Messages:
This budget has no scopes. It must have at least one scope.
Internet
2. Use the Details icon to add scopes and ALIs
1 record(s) retrieved.
Internet
Start
2 Windows ...
Microsoft Po...
CreatNewProj...
ModAppContr...
Welcome to ...
https://ftatea...
https://ftat...
10:57 AM


https://ftateamweb.fta.dot.gov - TEAM-Web (Training Database) - Microsoft Internet Explorer
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TEAM Administration
Dynamic Query
TEAM Documentation
Help Desk Informatio
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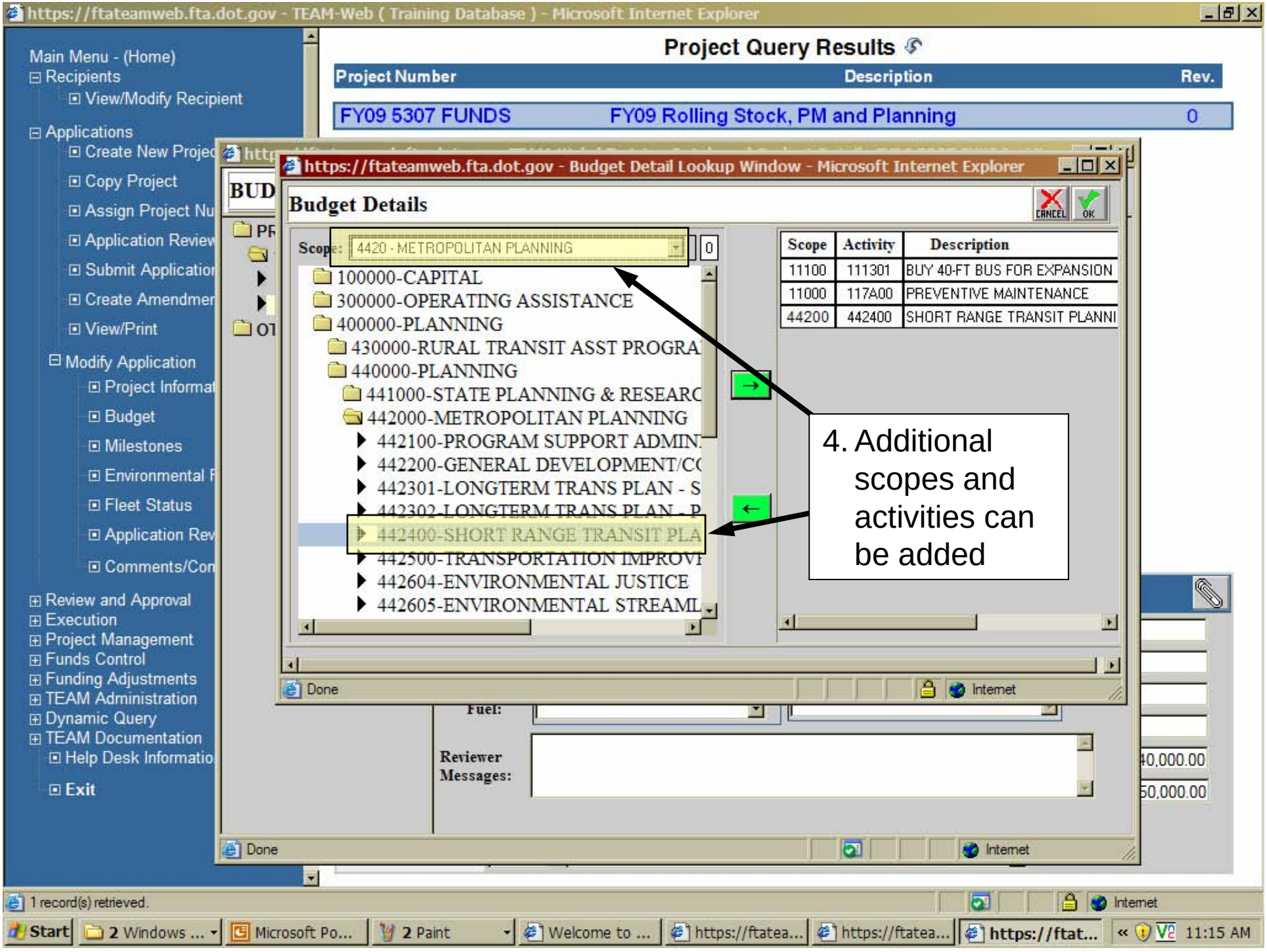
Project Query Results
Project Number
Description
Rev.
FY09 5307 FUNDS
FY09 Rolling Stock, PM and Planning
0
https://ftateamweb.fta.dot.gov - Budget Detail Lookup Window - Microsoft Internet Explorer
Budget Details
CANCEL
OK
Scope:
1110 - BUS - ROLLING STOCK
0
100000-CAPITAL
110000-CAPITAL - BUS
111000-BUS - ROLLING STOCK
111100-ENGINEERING & DESIGN - C
111200-BUY REPLACEMENTS - CAPI
111300-BUY EXPANSION - CAPITOL
111301-BUY 40-FT BUS FOR EXPAN
111302-BUY 35-FT BUS FOR EXPAN
111303-BUY 30-FT BUS FOR EXPAN
111304-BUY <30-FT BUS FOR EXPA
111305-BUY SCHOOL BUS FOR EXI
111306-BUY ARTIC BUS FOR EXPA
111307-BUY COMMUTER BUS FOR
111308-BUY INTERCITY BUS-EXPA
111309-BUY TROLLEY BUS FOR EX
Scope
Activity
Description
11100
111301
BUY 40-FT BUS FOR EXPANSION
3. Budgets are added by scope and activity
Done
Internet
Fuel:
Reviewer Messages:
40,000.00
50,000.00
Internet
1 record(s) retrieved.
Internet
Start
2 Windows ...
Microsoft Po...
2 Paint
Welcome to ...
https://ftatea...
https://ftatea...
https://ftat...
11:08 AM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Dynamic Query
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Help Desk Informatio
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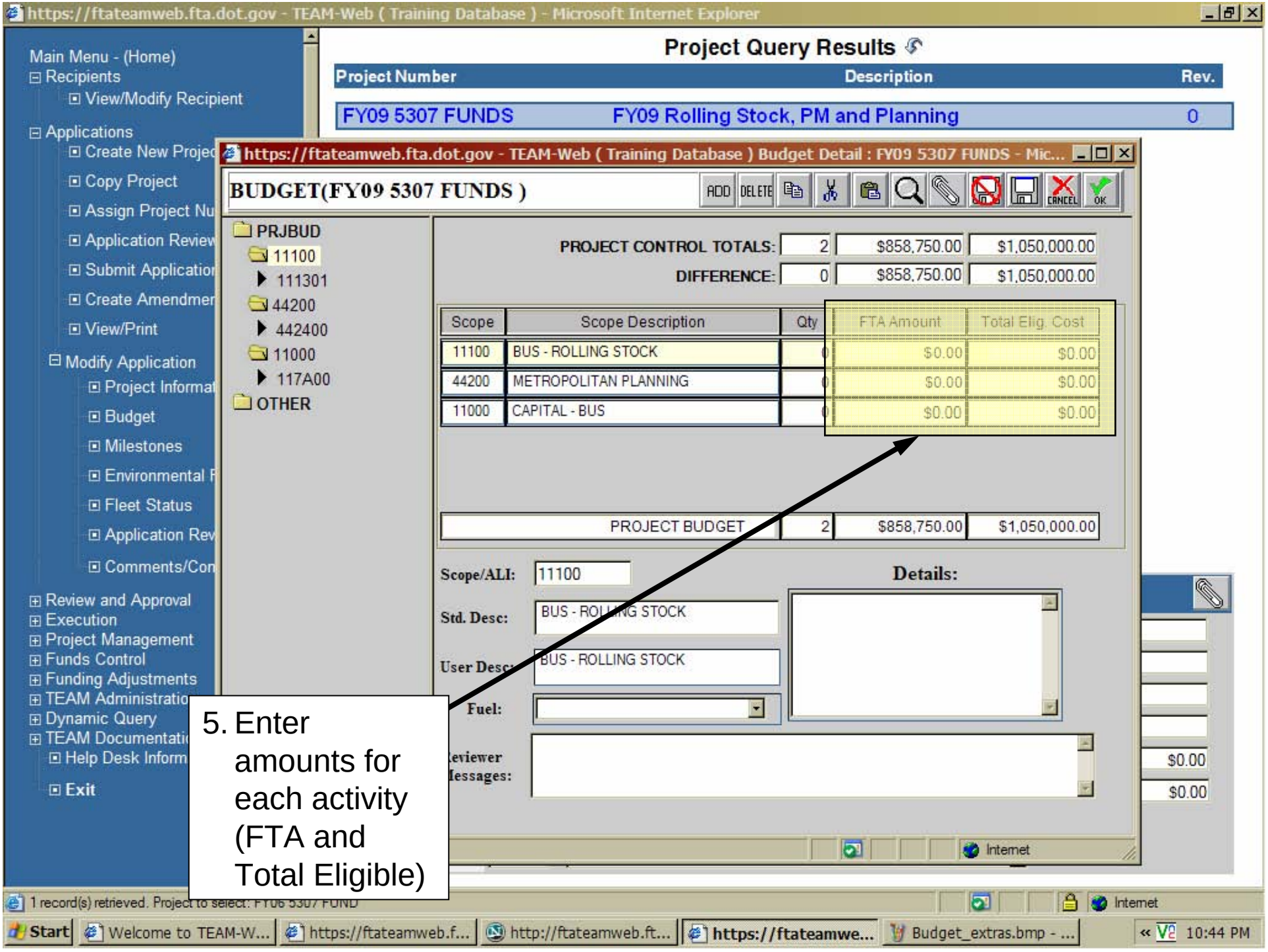
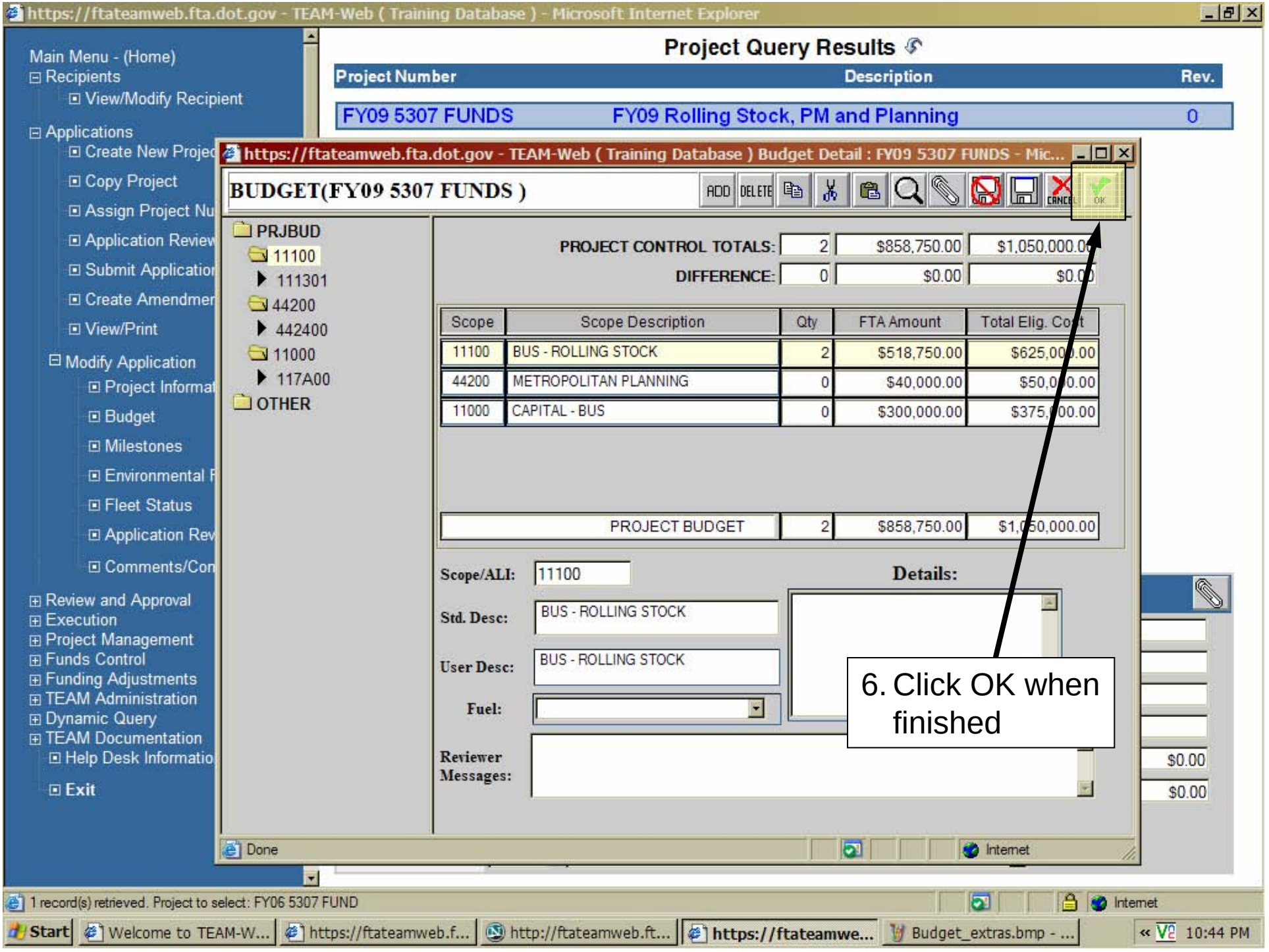
Project Query Results
Project Number
Description
Rev.
FY09 5307 FUNDS
FY09 Rolling Stock, PM and Planning
0
https://ftateamweb.fta.dot.gov - Budget Detail Lookup Window - Microsoft Internet Explorer
Budget Details
CANCEL
OK
Scope:
4420 - METROPOLITAN PLANNING
100000-CAPITAL
300000-OPERATING ASSISTANCE
400000-PLANNING
430000-RURAL TRANSIT ASST PROGRA
440000-PLANNING
441000-STATE PLANNING & RESEARC
442000-METROPOLITAN PLANNING
442100-PROGRAM SUPPORT ADMIN
442200-GENERAL DEVELOPMENT/C
442301-LONGTERM TRANS PLAN - S
442400-SHORT RANGE TRANSIT PLA
442500-TRANSPORTATION IMPROVI
442604-ENVIRONMENTAL JUSTICE
442605-ENVIRONMENTAL STREAML
Scope
Activity
Description
11100
111301
BUY 40-FT BUS FOR EXPANSION
11000
117A00
PREVENTIVE MAINTENANCE
44200
442400
SHORT RANGE TRANSIT PLANNI
4. Additional scopes and activities can be added
Done
Internet
Fuel:
Reviewer Messages:
Done
Internet
1 record(s) retrieved.
Internet
Start
2 Windows ...
Microsoft Po...
2 Paint
Welcome to ...
https://ftatea...
https://ftatea...
https://ftat...
11:15 AM



5. Enter amounts for each activity (FTA and Total Eligible)


https://ftateamweb.fta.dot.gov - TEAM-Web (Training Database) - Microsoft Internet Explorer
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TEAM Administration
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TEAM Documentation
Help Desk Informatio
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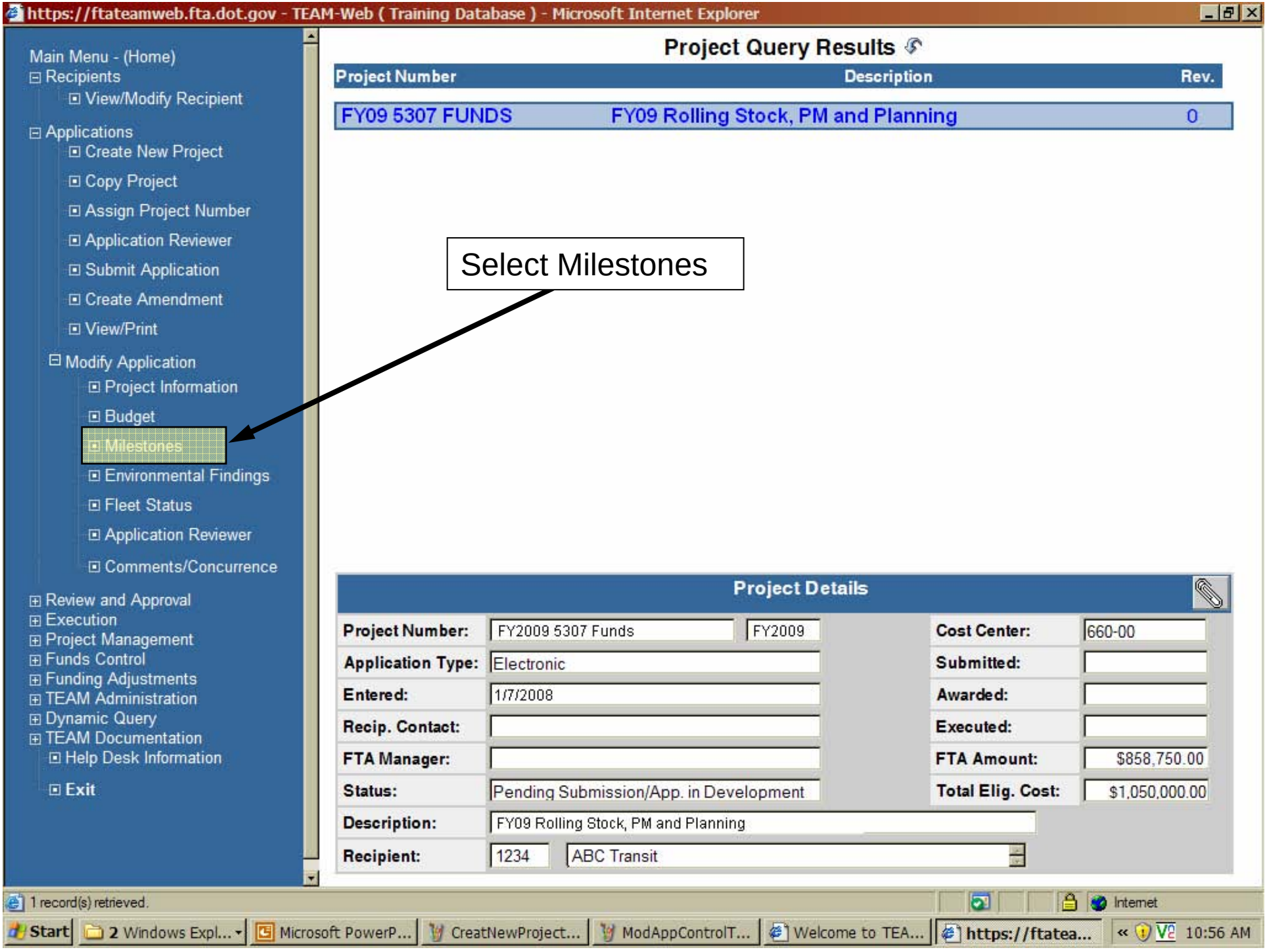
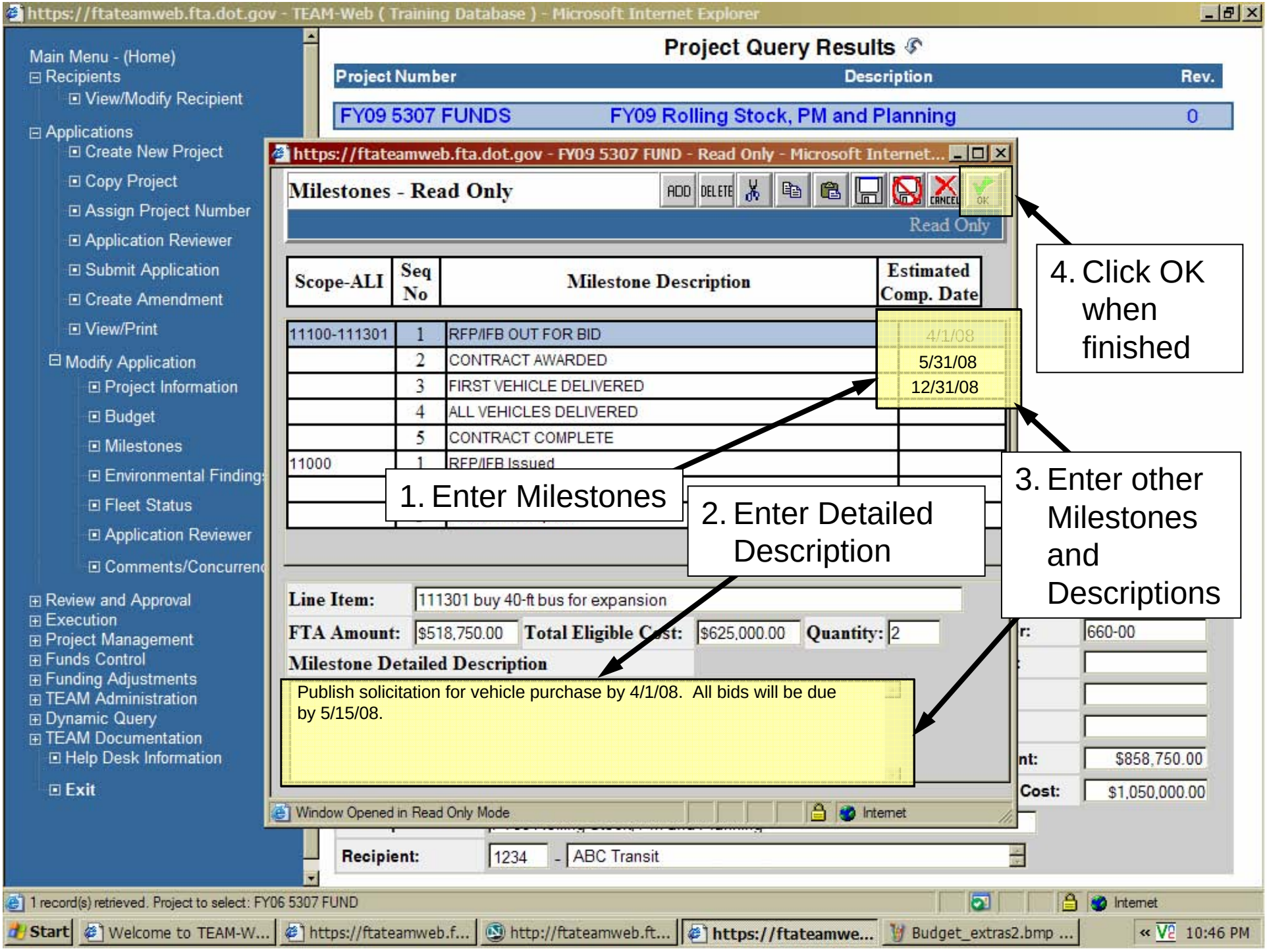
Project Query Results
Project Number
Description
Rev.
FY09 5307 FUNDS
FY09 Rolling Stock, PM and Planning
0
https://ftateamweb.fta.dot.gov - TEAM-Web (Training Database) Budget Detail : FY09 5307 FUNDS - Mic...
BUDGET(FY09 5307 FUNDS)
ADD
DELETE
CANCEL
OK
PRJBUD
11100
111301
44200
442400
11000
117A00
OTHER
PROJECT CONTROL TOTALS:
2
$858,750.00
$1,050,000.00
DIFFERENCE:
0
$0.00
$0.00
Scope
Scope Description
Qty
FTA Amount
Total Elig. Cost
11100
BUS - ROLLING STOCK
2
$518,750.00
$625,000.00
44200
METROPOLITAN PLANNING
0
$40,000.00
$50,000.00
11000
CAPITAL - BUS
0
$300,000.00
$375,000.00
PROJECT BUDGET
2
$858,750.00
$1,050,000.00
Scope/ALI:
11100
Details:
Std. Desc:
BUS - ROLLING STOCK
User Desc:
BUS - ROLLING STOCK
Fuel:
Reviewer Messages:
6. Click OK when finished
Done
Internet
$0.00
$0.00
1 record(s) retrieved. Project to select: FY06 5307 FUND
Internet
Start
Welcome to TEAM-W...
https://ftateamweb.f...
http://ftateamweb.ft...
https://ftateamwe...
Budget_extras.bmp - ...
10:44 PM


https://ftateamweb.fta.dot.gov - TEAM-Web (Training Database) - Microsoft Internet Explorer
Main Menu - (Home)
Recipients
View/Modify Recipient
Applications
Create New Project
Copy Project
Assign Project Number
Application Reviewer
Submit Application
Create Amendment
View/Print
Modify Application
Project Information
Budget
Milestones
Environmental Findings
Fleet Status
Application Reviewer
Comments/Concurrence
Review and Approval
Execution
Project Management
Funds Control
Funding Adjustments
TEAM Administration
Dynamic Query
TEAM Documentation
Help Desk Information
Exit
Project Query Results
Project Number
Description
Rev.
FY09 5307 FUNDS
FY09 Rolling Stock, PM and Planning
0
Select Milestones
Project Details
Project Number:
FY2009 5307 Funds
FY2009
Application Type:
Electronic
Entered:
1/7/2008
Recip. Contact:
FTA Manager:
Status:
Pending Submission/App. in Development
Description:
FY09 Rolling Stock, PM and Planning
Recipient:
1234
ABC Transit
Cost Center:
660-00
Submitted:
Awarded:
Executed:
FTA Amount:
$858,750.00
Total Elig. Cost:
$1,050,000.00
1 record(s) retrieved.
Internet
Start
2 Windows Expl...
Microsoft PowerP...
CreatNewProject...
ModAppControlT...
Welcome to TEA...
https://ftatea...
10:56 AM


https://ftateamweb.fta.dot.gov - TEAM-Web (Training Database) - Microsoft Internet Explorer
Main Menu - (Home)
Recipients
View/Modify Recipient
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Create New Project
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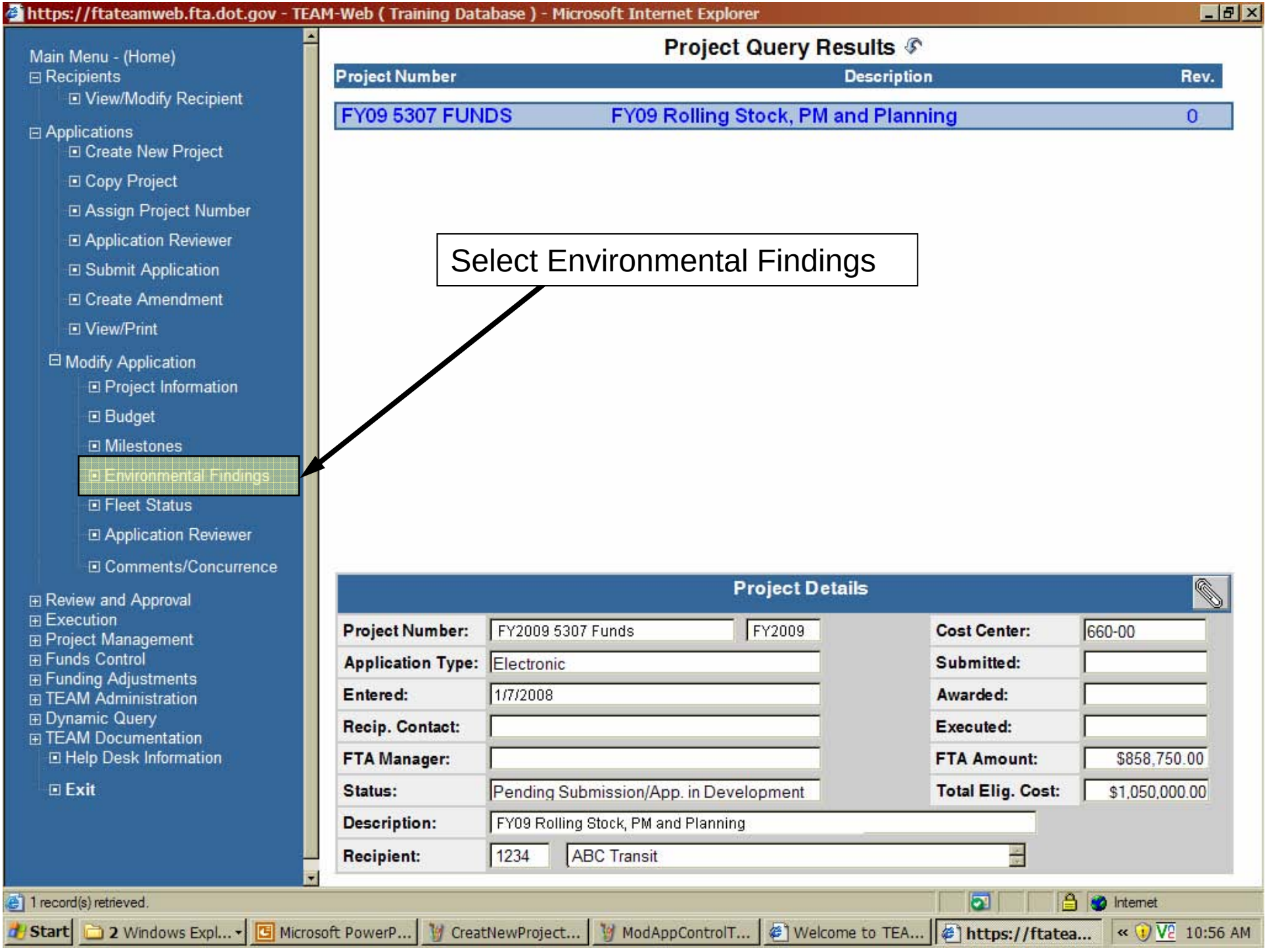
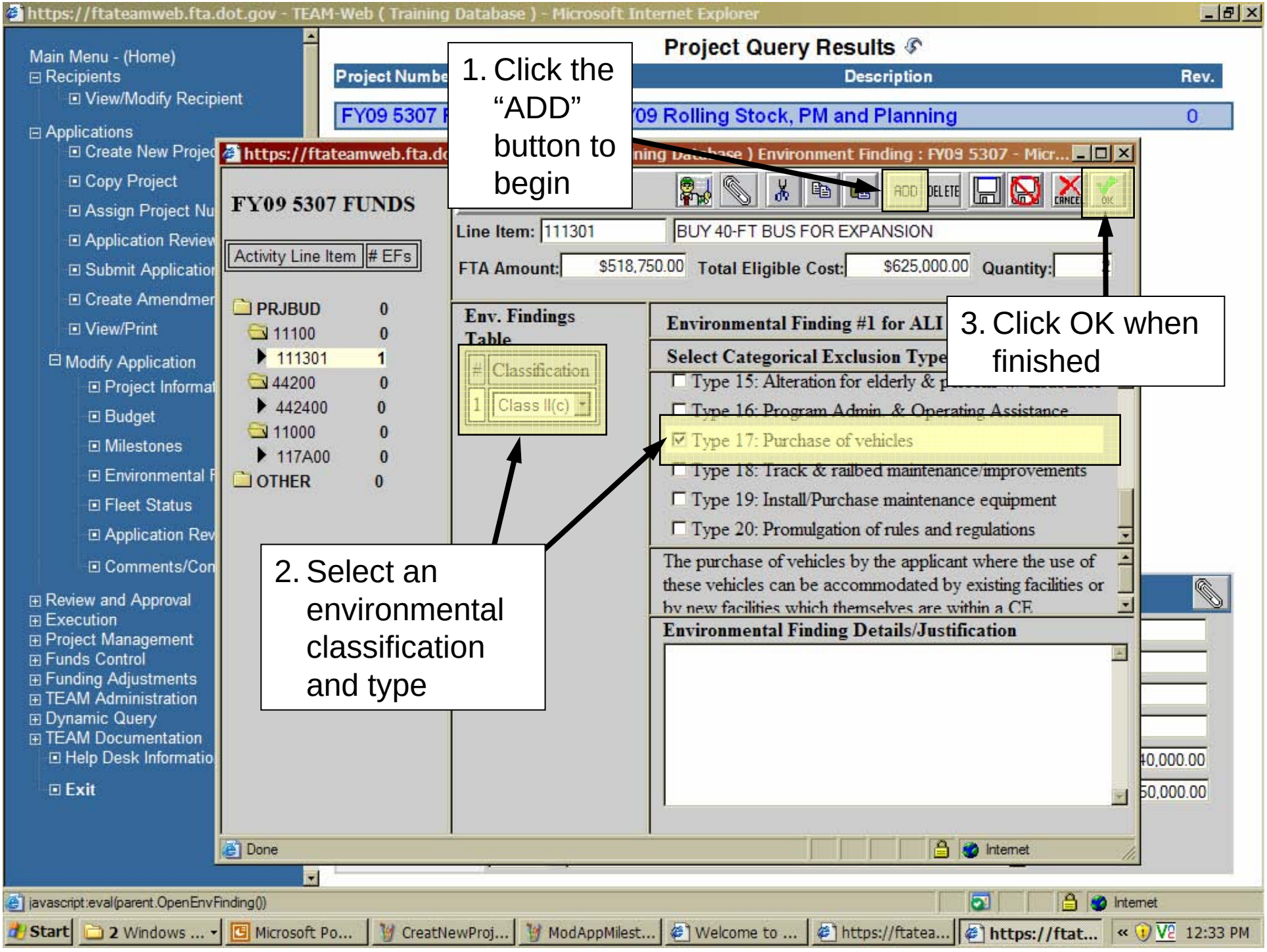
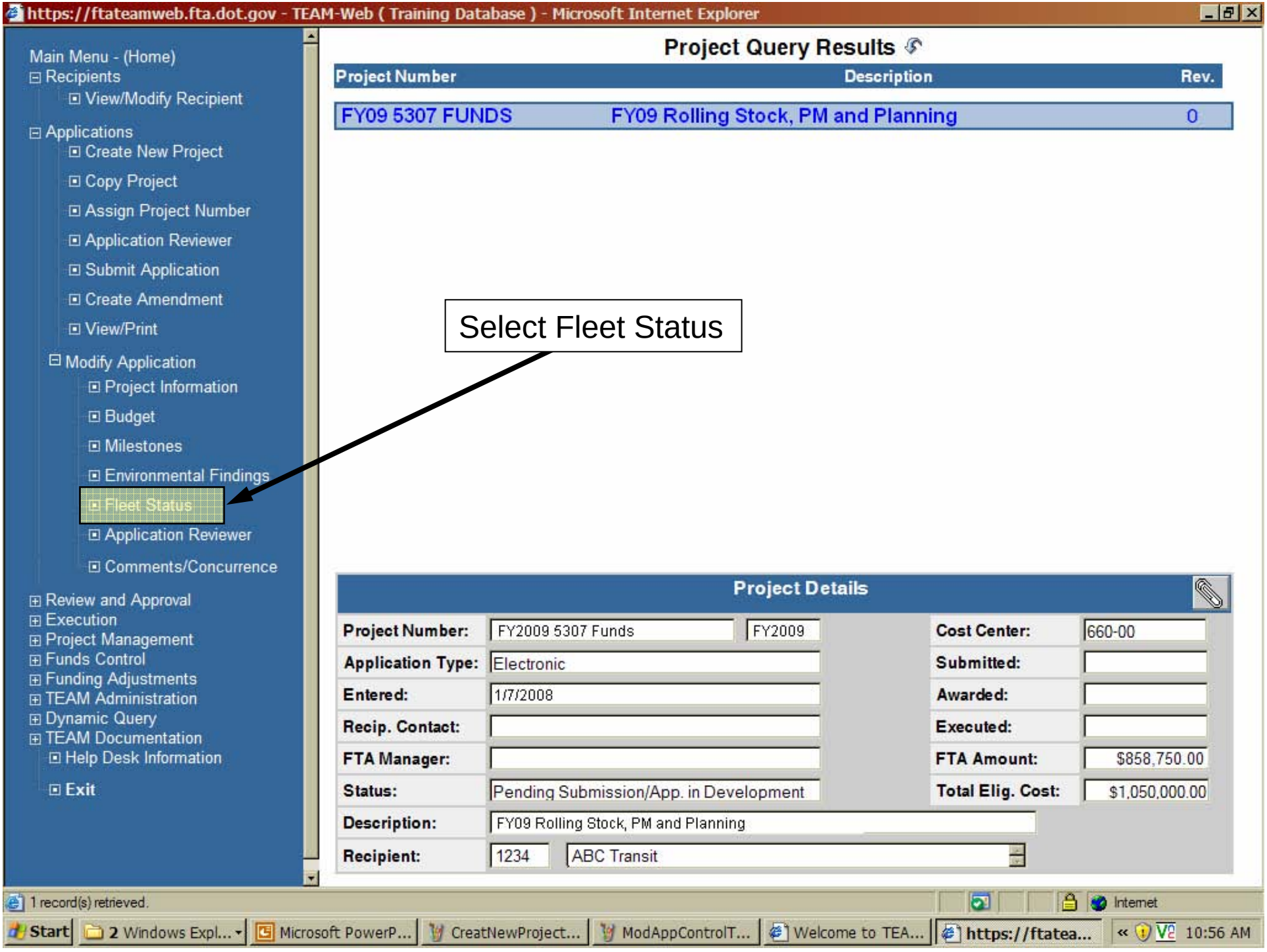
Application Reviewer
Submit Application
Create Amendment
View/Print
Modify Application
Project Information
Budget
Milestones
Environmental Finding
Fleet Status
Application Reviewer
Comments/Concurren
Review and Approval
Execution
Project Management
Funds Control
Funding Adjustments
TEAM Administration
Dynamic Query
TEAM Documentation
Help Desk Information
Exit
Project Query Results
Project Number
Description
Rev.
FY09 5307 FUNDS
FY09 Rolling Stock, PM and Planning
0
https://ftateamweb.fta.dot.gov - FY09 5307 FUND - Read Only - Microsoft Internet...
Milestones - Read Only
ADD
DELETE
CANCEL
OK
Read Only
Scope-ALI
Seq No
Milestone Description
Estimated Comp. Date
11100-111301
1
RFP/IFB OUT FOR BID
4/1/08
2
CONTRACT AWARDED
5/31/08
3
FIRST VEHICLE DELIVERED
12/31/08
4
ALL VEHICLES DELIVERED
5
CONTRACT COMPLETE
11000
1
RFP/IFB Issued
1. Enter Milestones
2. Enter Detailed Description
3. Enter other Milestones and Descriptions
4. Click OK when finished
Line Item:
111301 buy 40-ft bus for expansion
FTA Amount:
$518,750.00
Total Eligible Cost:
$625,000.00
Quantity:
2
Milestone Detailed Description
Publish solicitation for vehicle purchase by 4/1/08. All bids will be due by 5/15/08.
Window Opened in Read Only Mode
Internet
r:
660-00
nt:
$858,750.00
Cost:
$1,050,000.00
Recipient:
1234
ABC Transit
1 record(s) retrieved. Project to select: FY06 5307 FUND
Internet
Start
Welcome to TEAM-W...
https://ftateamweb.f...
http://ftateamweb.ft...
https://ftateamwe...
Budget_extras2.bmp ...
10:46 PM


https://ftateamweb.fta.dot.gov - TEAM-Web (Training Database) - Microsoft Internet Explorer
Main Menu - (Home)
Recipients
View/Modify Recipient
Applications
Create New Project
Copy Project
Assign Project Number
Application Reviewer
Submit Application
Create Amendment
View/Print
Modify Application
Project Information
Budget
Milestones
Environmental Findings
Fleet Status
Application Reviewer
Comments/Concurrence
Review and Approval
Execution
Project Management
Funds Control
Funding Adjustments
TEAM Administration
Dynamic Query
TEAM Documentation
Help Desk Information
Exit
Project Query Results
Project Number
Description
Rev.
FY09 5307 FUNDS
FY09 Rolling Stock, PM and Planning
0
Select Environmental Findings
Project Details
Project Number:
FY2009 5307 Funds
FY2009
Application Type:
Electronic
Entered:
1/7/2008
Recip. Contact:
FTA Manager:
Status:
Pending Submission/App. in Development
Description:
FY09 Rolling Stock, PM and Planning
Recipient:
1234
ABC Transit
Cost Center:
660-00
Submitted:
Awarded:
Executed:
FTA Amount:
$858,750.00
Total Elig. Cost:
$1,050,000.00
1 record(s) retrieved.
Internet
Start
2 Windows Expl...
Microsoft PowerP...
CreatNewProject...
ModAppControlT...
Welcome to TEA...
https://ftatea...
10:56 AM


1. Click the "ADD" button to begin
2. Select an environmental classification and type
3. Click OK when finished
Project Query Results
FY09 5307 FUNDS
Environment Finding : FY09 5307
Line Item: 111301
BUY 40-FT BUS FOR EXPANSION
FTA Amount: $518,750.00
Total Eligible Cost: $625,000.00
Quantity:
Env. Findings Table
Environmental Finding #1 for ALI
Select Categorical Exclusion Type
Type 15: Alteration for elderly &
Type 16: Program Admin. & Operating Assistance
Type 17: Purchase of vehicles
Type 18: Track & railbed maintenance/improvements
Type 19: Install/Purchase maintenance equipment
Type 20: Promulgation of rules and regulations
The purchase of vehicles by the applicant where the use of these vehicles can be accommodated by existing facilities or by new facilities which themselves are within a CE
Environmental Finding Details/Justification
Main Menu - (Home)
Recipients
Applications
Modify Application
Review and Approval
Execution
Project Management
Funds Control
Funding Adjustments
TEAM Administration
Dynamic Query
TEAM Documentation
Exit


https://ftateamweb.fta.dot.gov - TEAM-Web (Training Database) - Microsoft Internet Explorer
Main Menu - (Home)
Recipients
View/Modify Recipient
Applications
Create New Project
Copy Project
Assign Project Number
Application Reviewer
Submit Application
Create Amendment
View/Print
Modify Application
Project Information
Budget
Milestones
Environmental Findings
Fleet Status
Application Reviewer
Comments/Concurrence
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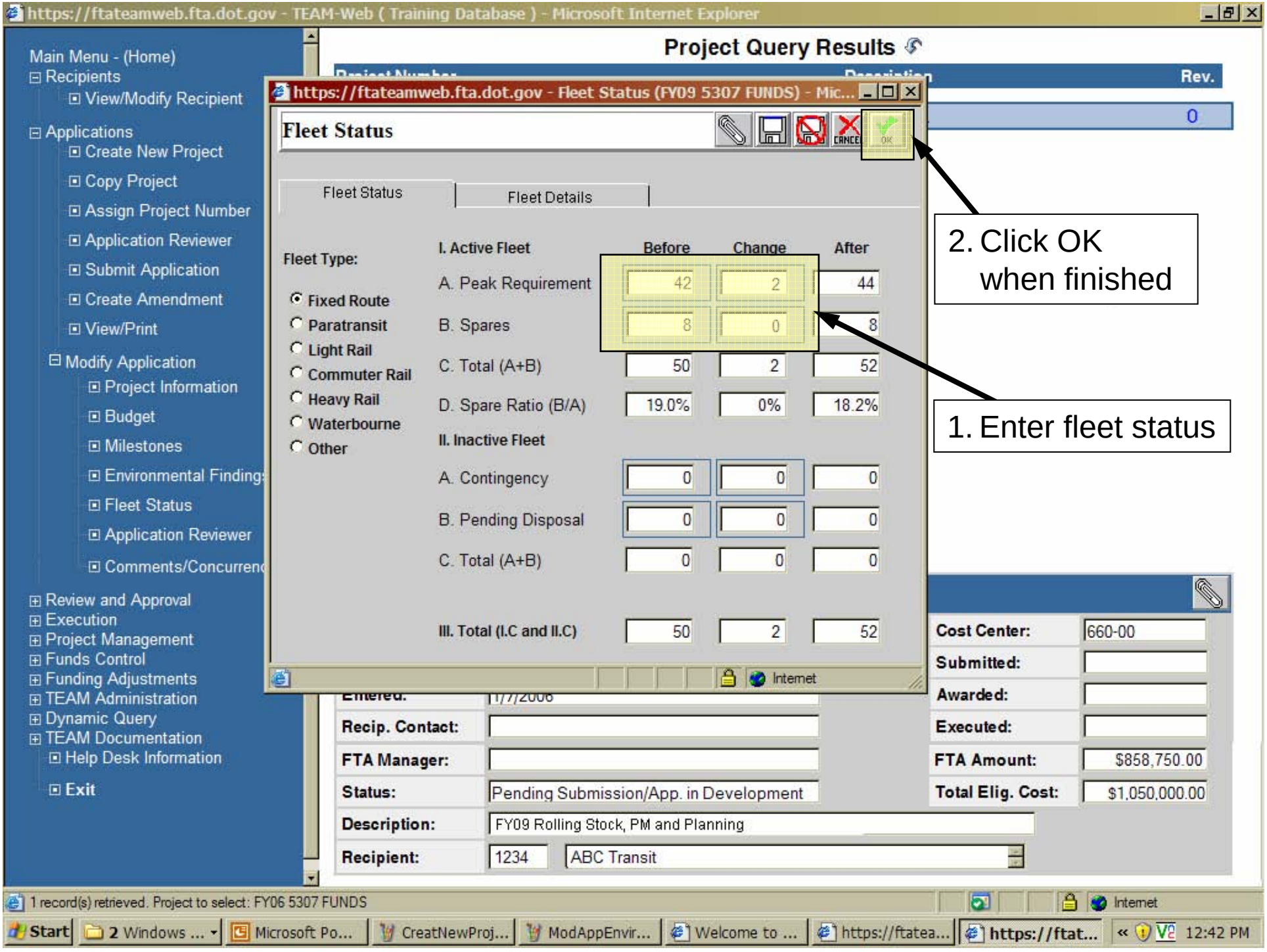
TEAM Administration
Dynamic Query
TEAM Documentation
Help Desk Information
Exit
Project Query Results
Project Number
Description
Rev.
FY09 5307 FUNDS
FY09 Rolling Stock, PM and Planning
0
Select Fleet Status
Project Details
Project Number:
FY2009 5307 Funds
FY2009
Application Type:
Electronic
Entered:
1/7/2008
Recip. Contact:
FTA Manager:
Status:
Pending Submission/App. in Development
Description:
FY09 Rolling Stock, PM and Planning
Recipient:
1234
ABC Transit
Cost Center:
660-00
Submitted:
Awarded:
Executed:
FTA Amount:
$858,750.00
Total Elig. Cost:
$1,050,000.00
1 record(s) retrieved.
Internet
Start
2 Windows Expl...
Microsoft PowerP...
CreatNewProject...
ModAppControlT...
Welcome to TEA...
https://ftatea...
10:56 AM


https://ftateamweb.fta.dot.gov - TEAM-Web (Training Database) - Microsoft Internet Explorer
Main Menu - (Home)
Recipients
View/Modify Recipient
Applications
Create New Project
Copy Project
Assign Project Number
Application Reviewer
Submit Application
Create Amendment
View/Print
Modify Application
Project Information
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Milestones
Environmental Finding
Fleet Status
Application Reviewer
Comments/Concurren
Review and Approval
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Funds Control
Funding Adjustments
TEAM Administration
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TEAM Documentation
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Exit
Project Query Results
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0
https://ftateamweb.fta.dot.gov - Fleet Status (FY09 5307 FUNDS) - Mic...
Fleet Status
CANCEL
OK
Fleet Status
Fleet Details
Fleet Type:
Fixed Route
Paratransit
Light Rail
Commuter Rail
Heavy Rail
Waterbourne
Other
I. Active Fleet
Before
Change
After
A. Peak Requirement
42
2
44
B. Spares
8
0
8
C. Total (A+B)
50
2
52
D. Spare Ratio (B/A)
19.0%
0%
18.2%
II. Inactive Fleet
A. Contingency
0
0
0
B. Pending Disposal
0
0
0
C. Total (A+B)
0
0
0
III. Total (I.C and II.C)
50
2
52
Internet
2. Click OK when finished
1. Enter fleet status
Cost Center:
660-00
Submitted:
Awarded:
Executed:
FTA Amount:
$858,750.00
Total Elig. Cost:
$1,050,000.00
Recip. Contact:
FTA Manager:
Status:
Pending Submission/App. in Development
Description:
FY09 Rolling Stock, PM and Planning
Recipient:
1234
ABC Transit
1 record(s) retrieved. Project to select: FY06 5307 FUNDS
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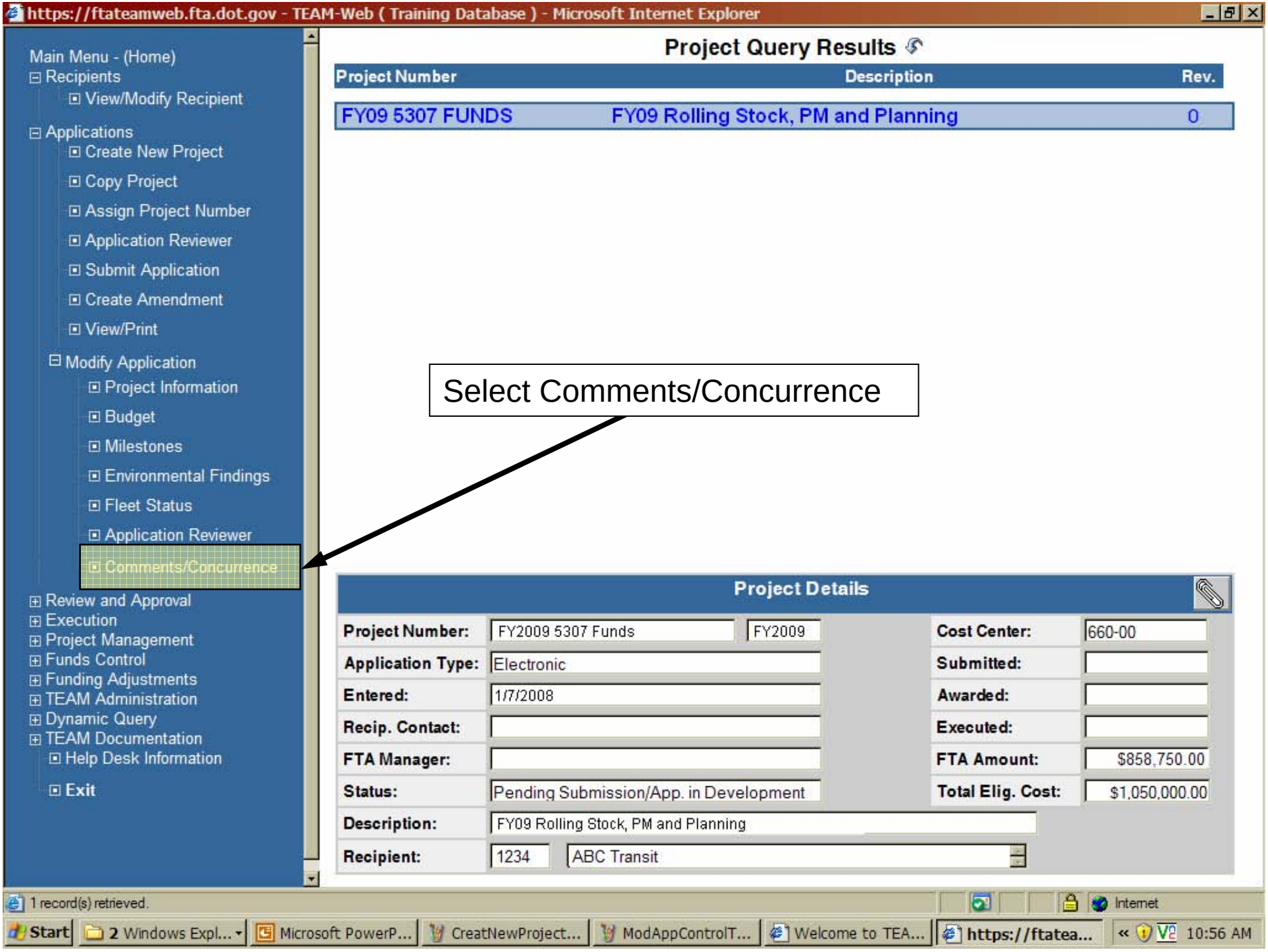
12:42 PM


https://ftateamweb.fta.dot.gov - TEAM-Web (Training Database) - Microsoft Internet Explorer
Main Menu - (Home)
Recipients
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Copy Project
Assign Project Number
Application Reviewer
Submit Application
Create Amendment
View/Print
Modify Application
Project Information
Budget
Milestones
Environmental Findings
Fleet Status
Application Reviewer
Comments/Concurrence
Review and Approval
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Help Desk Information
Exit
Project Query Results
Project Number
Description
Rev.
FY09 5307 FUNDS
FY09 Rolling Stock, PM and Planning
0
Select Comments/Concurrence
Project Details
Project Number:
FY2009 5307 Funds
FY2009
Application Type:
Electronic
Entered:
1/7/2008
Recip. Contact:
FTA Manager:
Status:
Pending Submission/App. in Development
Description:
FY09 Rolling Stock, PM and Planning
Recipient:
1234
ABC Transit
Cost Center:
660-00
Submitted:
Awarded:
Executed:
FTA Amount:
$858,750.00
Total Elig. Cost:
$1,050,000.00
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Welcome to TEA...
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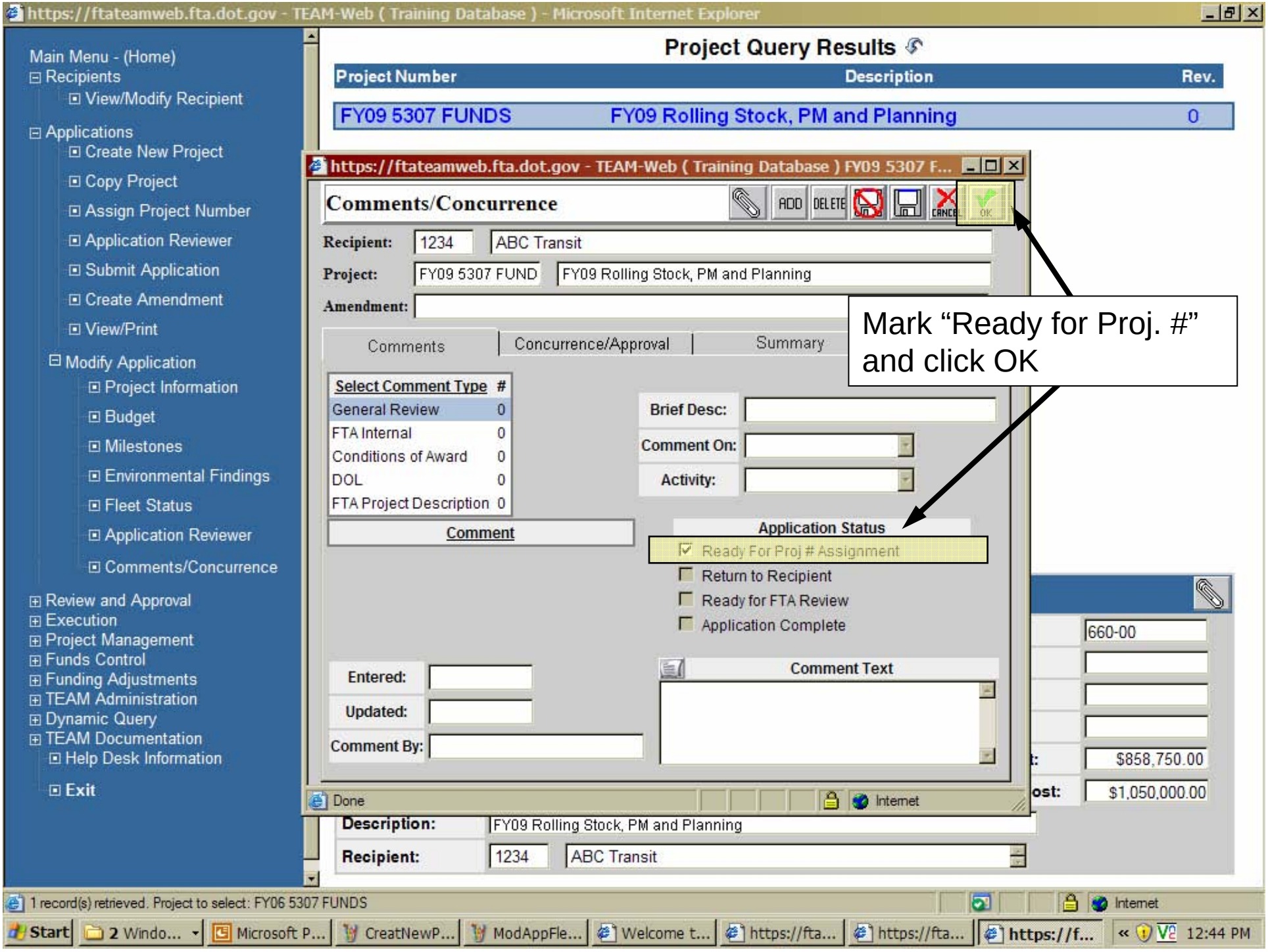
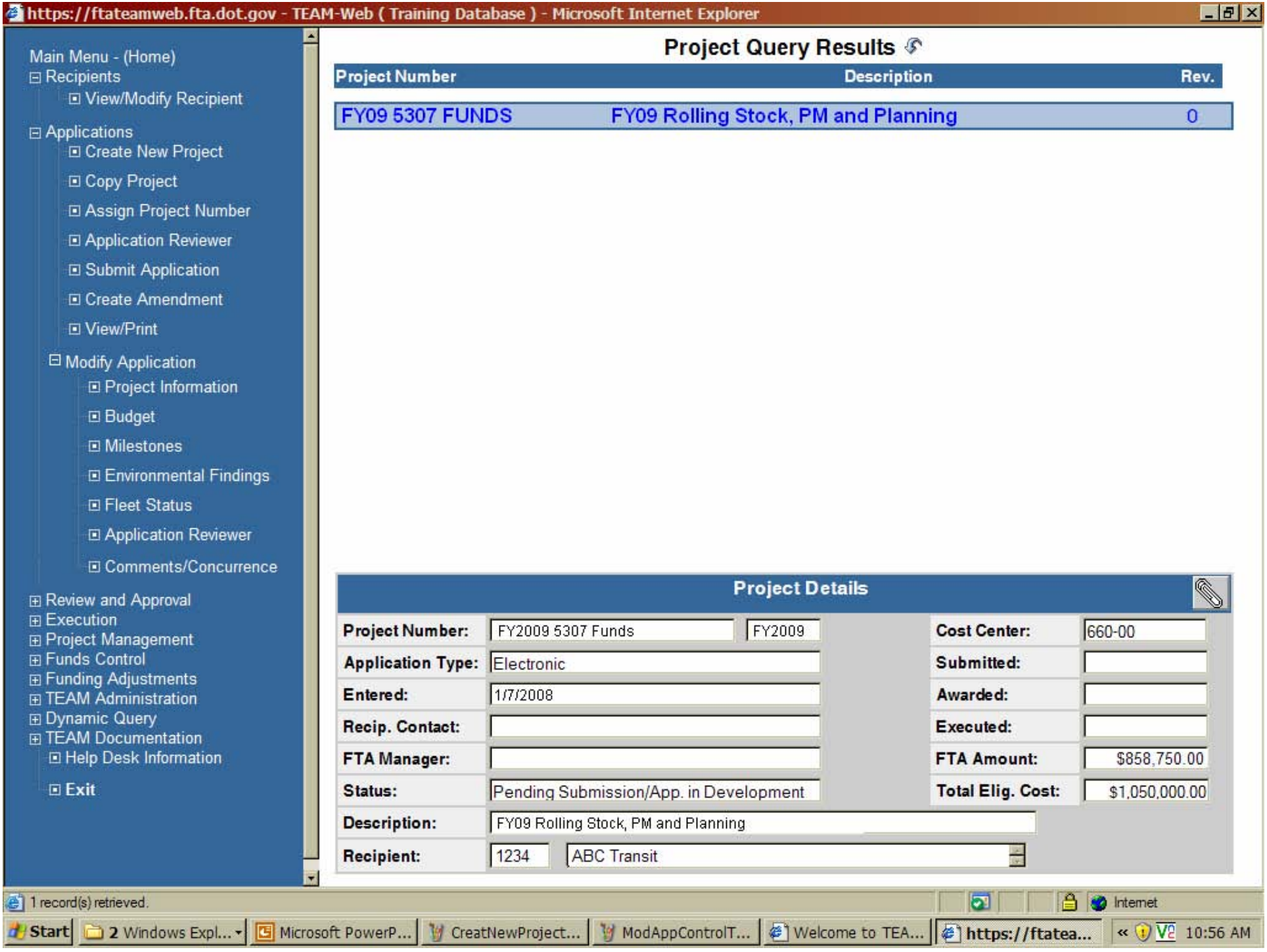
10:56 AM



Mark “Ready for Proj. #” and click OK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Rev.
FY09 5307 FUNDS
FY09 Rolling Stock, PM and Planning
0
Project Details
Project Number:
FY2009 5307 Funds
FY2009
Application Type:
Electronic
Entered:
1/7/2008
Recip. Contact:
FTA Manager:
Status:
Pending Submission/App. in Development
Description:
FY09 Rolling Stock, PM and Planning
Recipient:
1234
ABC Transit
Cost Center:
660-00
Submitted:
Awarded:
Executed:
FTA Amount:
$858,750.00
Total Elig. Cost:
$1,050,000.00
1 record(s) retrieved.
Internet
Start
2 Windows Expl...
Microsoft PowerP...
CreatNewProject...
ModAppControlT...
Welcome to TEA...
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10:56 AM

Grant Management

Grant Management

- FTA Circular 5010.1C
  - Financial Status Reports (FSRs)
  - Milestone Progress Reports (MPRs)
  - ECHO draws
  - Budget Revisions
  - Grant Amendments
  - Grant Closeout
- Activities performed using TEAM-Web

Financial Status Reports

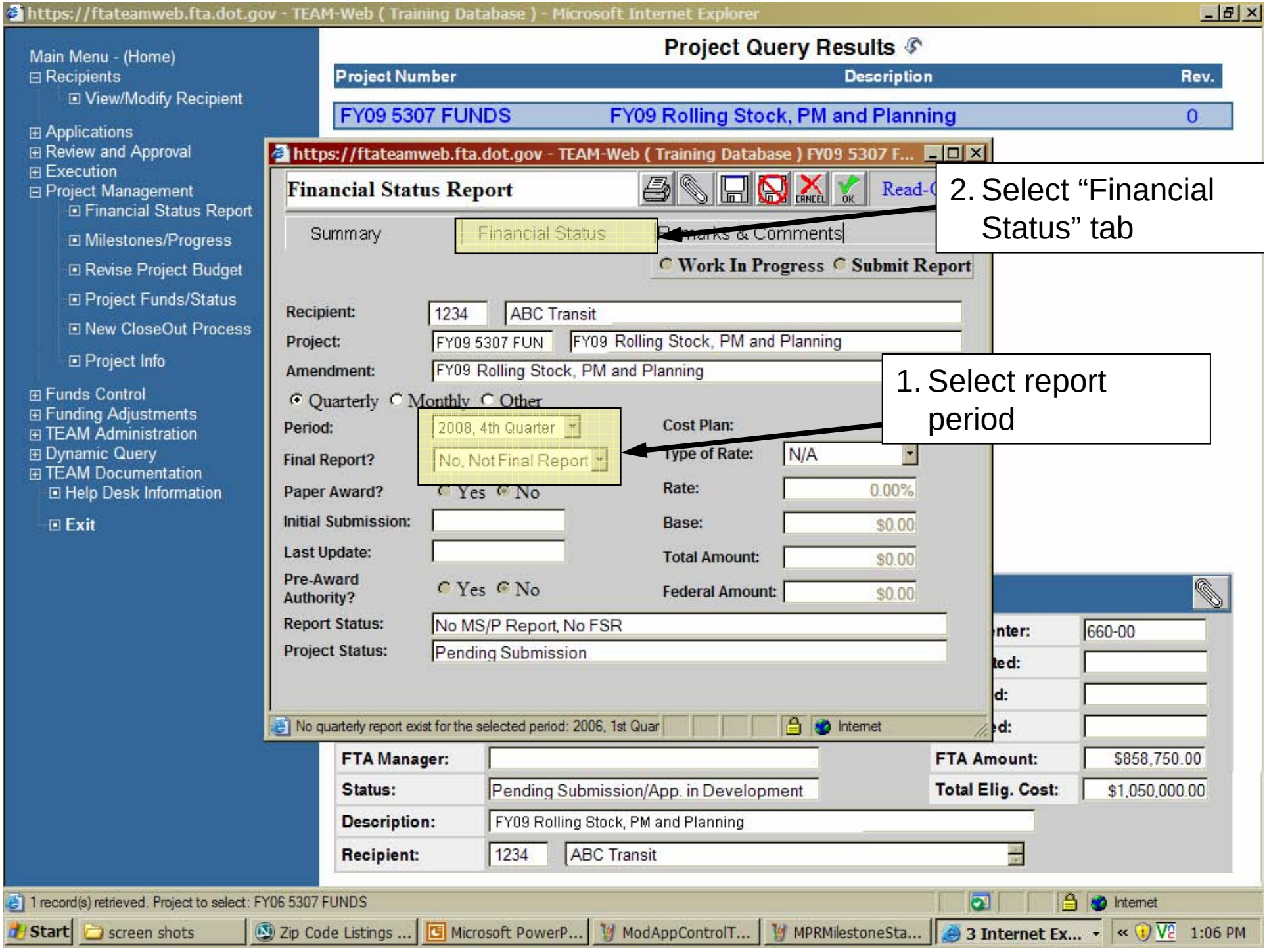
- Due quarterly for grantees in urbanized areas with 200,000 or more in population
- Due annually for grantees in urbanized areas under 200,000 in population
- Due 30 days after end of quarter or fiscal year

Financial Status Reports

- Report on accrual basis
- Report funds expended and unliquidated obligations
- Report actual, not budgeted, costs

Unliquidated Obligations

- Encumbrance against the grant for which no cash outlay has been recorded (value of goods and services under contract but not yet received)
- Examples:
  - Contract for buses on order
  - Contract for construction services not yet rendered
  - Open purchase orders
  - Contract retentions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Project Management
Financial Status Report
Milestones/Progress
Revise Project Budget
Project Funds/Status
New CloseOut Process
Project Info
Funds Control
Funding Adjustments
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Financial Status Report
Summary
Financial Status
Remarks & Comments
Work In Progress
Submit Report
Recipient:
1234
ABC Transit
Project:
FY09 5307 FUN
FY09 Rolling Stock, PM and Planning
Amendment:
FY09 Rolling Stock, PM and Planning
Quarterly
Monthly
Other
Period:
2008, 4th Quarter
Final Report?
No, Not Final Report
Paper Award?
Yes
No
Initial Submission:
Last Update:
Pre-Award Authority?
Yes
No
Report Status:
No MS/P Report, No FSR
Project Status:
Pending Submission
Cost Plan:
Type of Rate:
N/A
Rate:
0.00%
Base:
$0.00
Total Amount:
$0.00
Federal Amount:
$0.00
No quarterly report exist for the selected period: 2006, 1st Quar
Internet
2. Select “Financial Status” tab
1. Select report period
FTA Manager:
Status:
Pending Submission/App. in Development
Description:
FY09 Rolling Stock, PM and Planning
Recipient:
1234
ABC Transit
FTA Amount:
$858,750.00
Total Elig. Cost:
$1,050,000.00
1 record(s) retrieved. Project to select: FY06 5307 FUNDS
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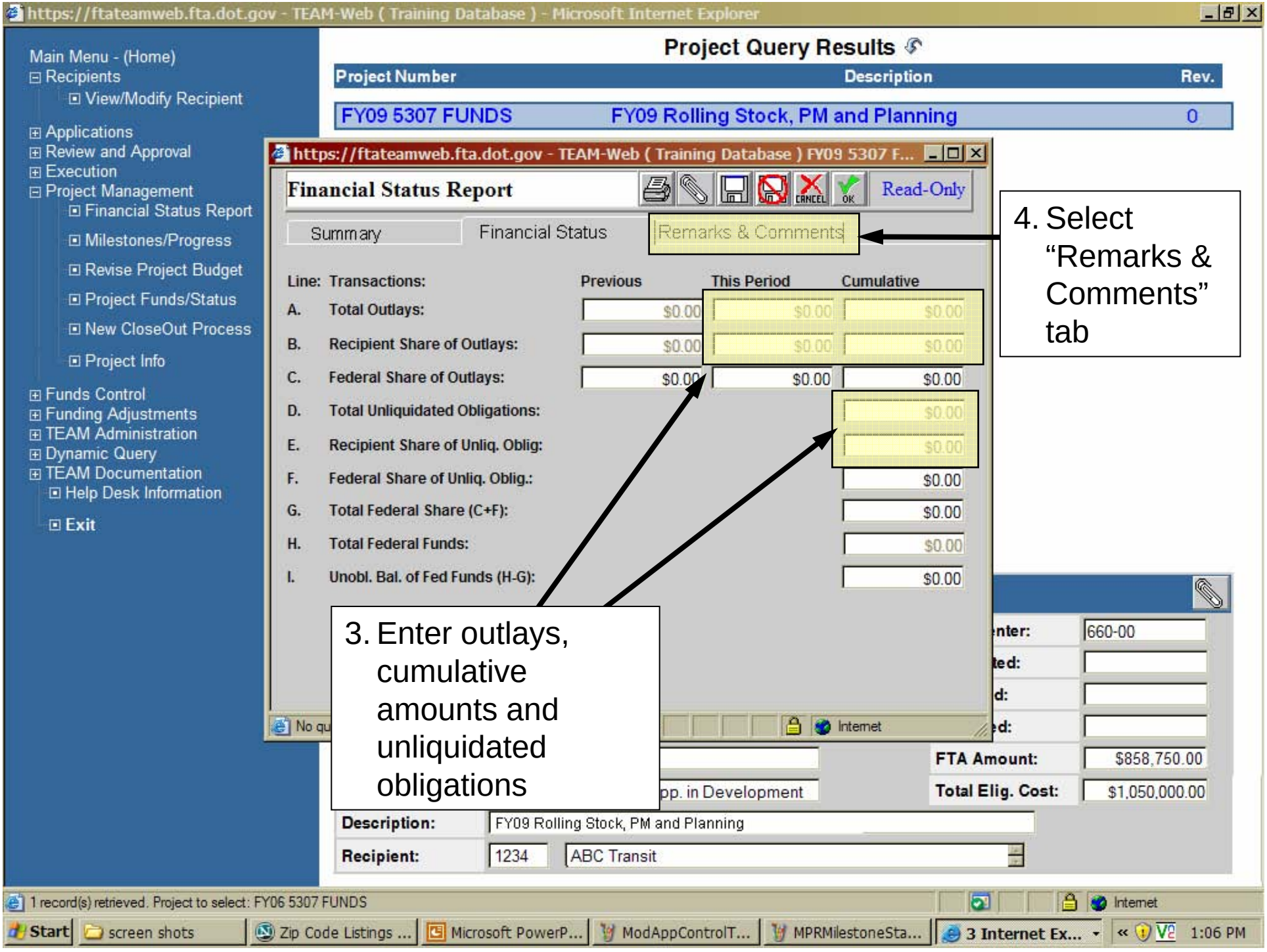
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Milestones/Progress
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New CloseOut Process
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Financial Status Report
Read-Only
Summary
Financial Status
Remarks & Comments
Line: Transactions:
Previous
This Period
Cumulative
A. Total Outlays:
B. Recipient Share of Outlays:
C. Federal Share of Outlays:
D. Total Unliquidated Obligations:
E. Recipient Share of Unliq. Oblig:
F. Federal Share of Unliq. Oblig.:
G. Total Federal Share (C+F):
H. Total Federal Funds:
I. Unobl. Bal. of Fed Funds (H-G):
4. Select "Remarks & Comments" tab
3. Enter outlays, cumulative amounts and unliquidated obligations
FTA Amount:
$858,750.00
Total Elig. Cost:
$1,050,000.00
Description:
FY09 Rolling Stock, PM and Planning
Recipient:
1234
ABC Transit
1 record(s) retrieved. Project to select: FY06 5307 FUNDS
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ModAppControlT...
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3 Internet Ex...
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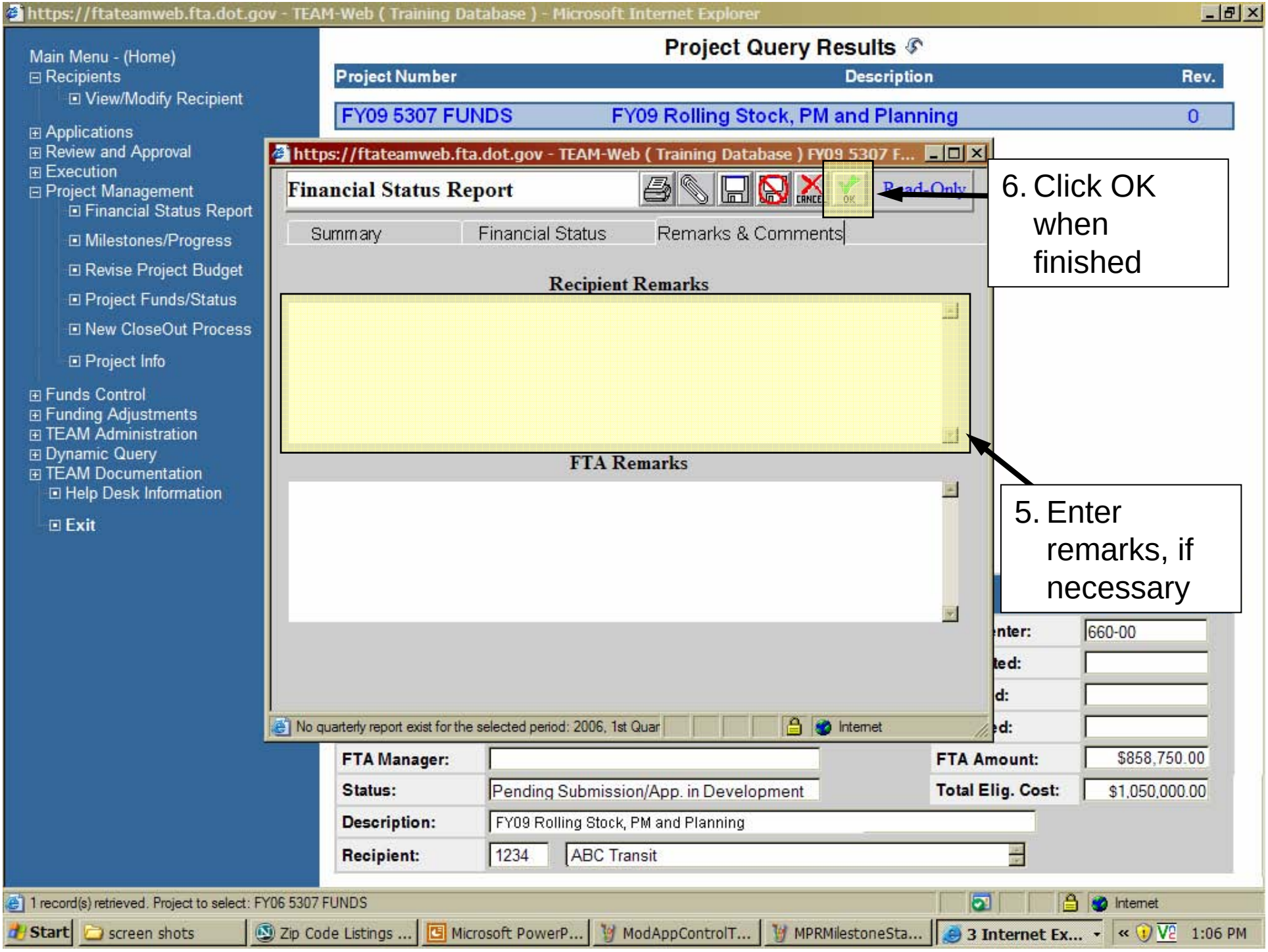
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Financial Status Report
Read-Only
Summary
Financial Status
Remarks & Comments
Recipient Remarks
FTA Remarks
6. Click OK when finished
5. Enter remarks, if necessary
No quarterly report exist for the selected period: 2006, 1st Quar
Internet
FTA Manager:
Status:
Pending Submission/App. in Development
Description:
FY09 Rolling Stock, PM and Planning
Recipient:
1234
ABC Transit
FTA Amount:
$858,750.00
Total Elig. Cost:
$1,050,000.00
660-00
1 record(s) retrieved. Project to select: FY06 5307 FUNDS
Internet
Start
screen shots
Zip Code Listings ...
Microsoft PowerP...
ModAppControlT...
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3 Internet Ex...
1:06 PM

Milestone Progress Reports

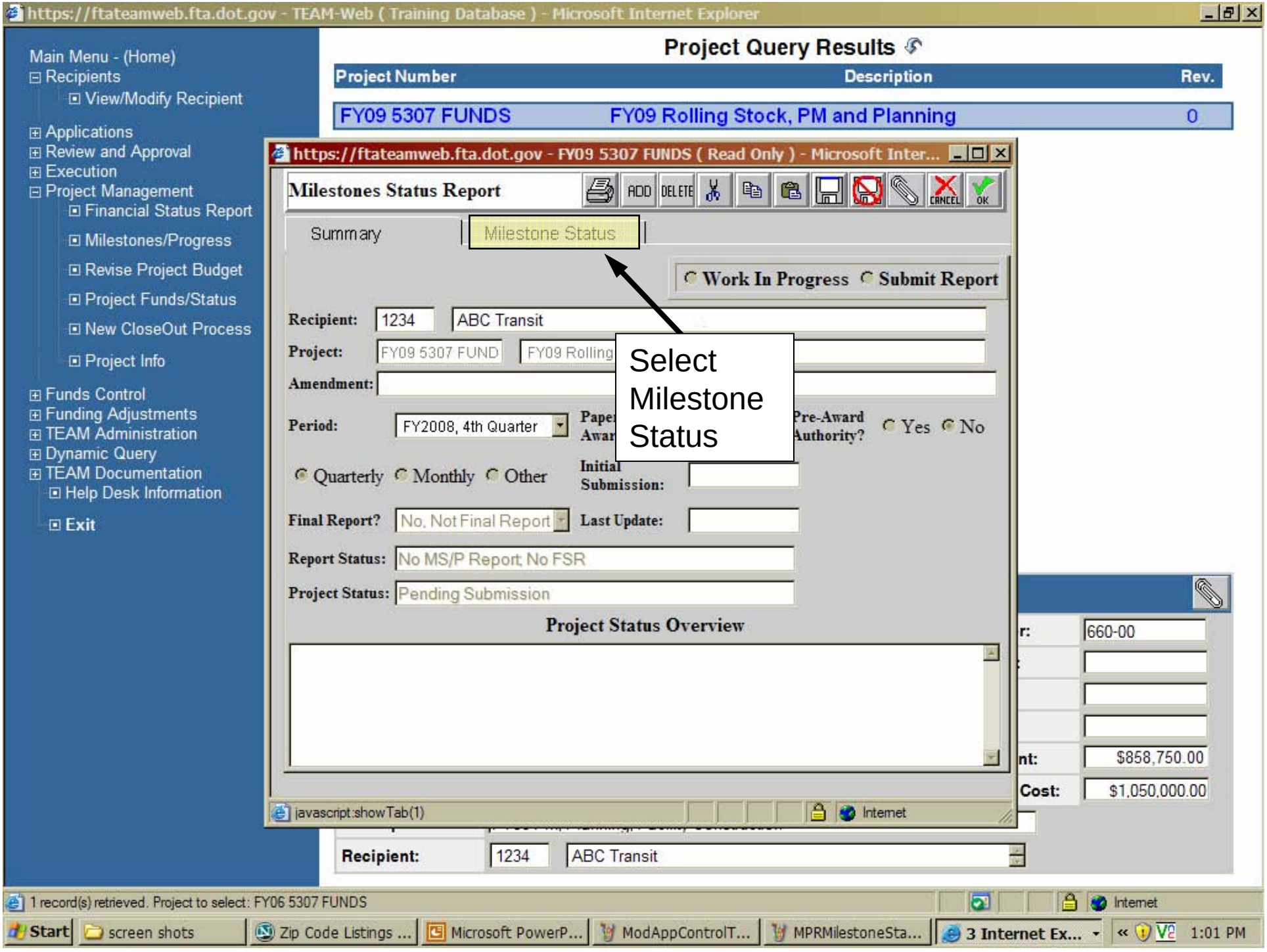
- Due quarterly for grantees in urbanized areas with 200,000 or more in population
- Due annually for grantees in urbanized areas under 200,000 in population
- Due 30 days after end of quarter or fiscal year

Milestone Progress Reports

- Check milestones and revise as necessary
- Discuss changes in milestone dates
- Discuss budget or schedule changes
- Discuss problems with projects--delays, cost variances, and other unforeseen events

Milestone Progress Reports

- List outstanding claims over $100,000 and claims settled
- List change orders exceeding $100,000, pending or settled
- Report on transit enhancements (4th quarter only for designated recipients in urbanized areas of 200,000 or more)
- Submit even when no activity or changes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Milestones/Progress
Revise Project Budget
Project Funds/Status
New CloseOut Process
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Project Number
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FY09 Rolling Stock, PM and Planning
0
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Milestones Status Report
ADD
DELETE
CANCEL
OK
Summary
Milestone Status
Work In Progress
Submit Report
Recipient:
1234
ABC Transit
Project:
FY09 5307 FUND
FY09 Rolling
Amendment:
Period:
FY2008, 4th Quarter
Pre-Award Authority?
Yes
No
Quarterly
Monthly
Other
Initial Submission:
Final Report?
No, Not Final Report
Last Update:
Report Status:
No MS/P Report, No FSR
Project Status:
Pending Submission
Project Status Overview
javascript:showTab(1)
Internet
Select Milestone Status
660-00
$858,750.00
$1,050,000.00
Recipient:
1234
ABC Transit
1 record(s) retrieved. Project to select: FY06 5307 FUNDS
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MPRMilestoneSta...
3 Internet Ex...
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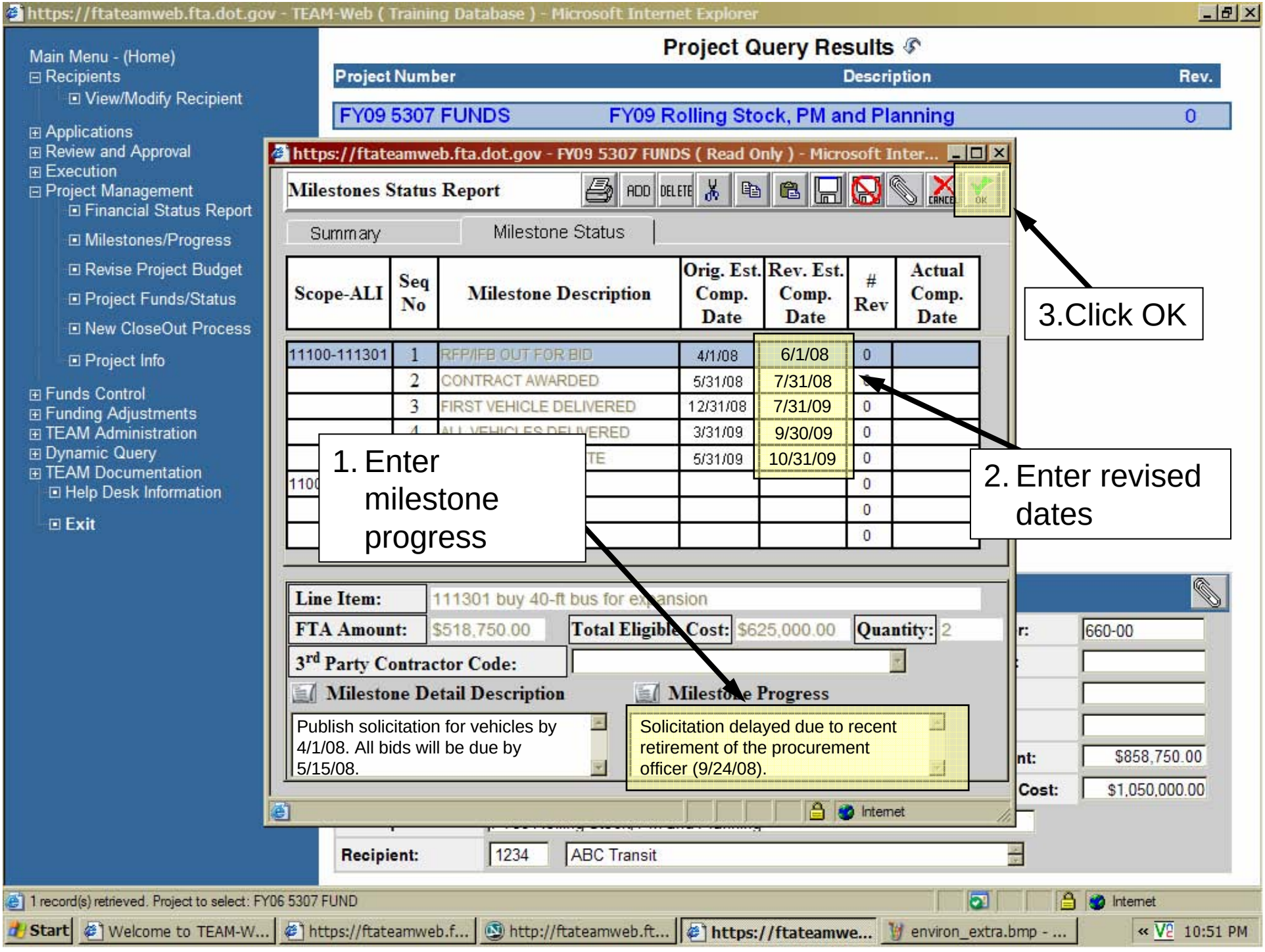
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Financial Status Report
Milestones/Progress
Revise Project Budget
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Milestones Status Report
ADD
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CANCEL
OK
Summary
Milestone Status
Scope-ALI
Seq No
Milestone Description
Orig. Est. Comp. Date
Rev. Est. Comp. Date
Rev
Actual Comp. Date
11100-111301
1
RFP/IFB OUT FOR BID
4/1/08
6/1/08
0
2
CONTRACT AWARDED
5/31/08
7/31/08
3
FIRST VEHICLE DELIVERED
12/31/08
7/31/09
0
3/31/09
9/30/09
0
5/31/09
10/31/09
0
0
0
0
1. Enter milestone progress
2. Enter revised dates
3.Click OK
Line Item:
111301 buy 40-ft bus for expansion
FTA Amount:
$518,750.00
Total Eligible Cost:
$625,000.00
Quantity:
2
3rd Party Contractor Code:
Milestone Detail Description
Publish solicitation for vehicles by 4/1/08. All bids will be due by 5/15/08.
Milestone Progress
Solicitation delayed due to recent retirement of the procurement officer (9/24/08).
Internet
r:
660-00
nt:
$858,750.00
Cost:
$1,050,000.00
Recipient:
1234
ABC Transit
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Internet
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environ_extra.bmp - ...
10:51 PM

ECHO Draws

- Draw funds periodically to ensure timely grant closeout
- For 5307 grants, code draws using proper financial purpose code
  - 0 – capital
  - 2 – planning
  - 4 – operating
  - 8 – capital costs of ADA complementary paratransit

ECHO Draws

- Have supervisor review and sign to ensure segregation of duties
- Maintain on file documentation supporting amounts drawn
  - Project expenditure reports
  - Vendor invoices
  - Check/payment issuance
- Disburse funds within three business days

Reconcile Grant Balances

- Frequently reconcile internal grant balances with TEAM and FSR balances
- Reconcile to the financial purpose code level
- Use Project/Funds Status screen in TEAM

Revisions vs Amendments

- Budget Revision
  - Make a change within the scope of the grant
  - Do any time
- Grant Amendment
  - Change the scope of the grant or Federal participation
  - Do within the period of availability of funds

Budget Revisions Not Requiring FTA Approval

- Transfer funds within scope and between scopes of same matching ratio if under 20 percent
- Add activities within scope

Budget Revisions Requiring Prior FTA Approval

- Add, delete or modify work tasks
- Transfer funds exceeding 20 percent of budget
- Increase or reduce number of units where the change does not exceed the greater of 2 units or 20 percent
- Transfer funds between operating scopes with different matching ratios

Grant Amendment

- Increase or reduce number of units where the change exceeds the greater of 2 units or 20 percent
- Add a project scope
- Delete a project scope which changes the grant scope

Good Grant Management Practices

- Assign responsibility for grant reporting and ensuring projects are on schedule
- Wait to apply for funds until the project is ready to go
- Sweep grants annually for unexpended project balances
- Spend the oldest funds first

Good Grant Management Practices

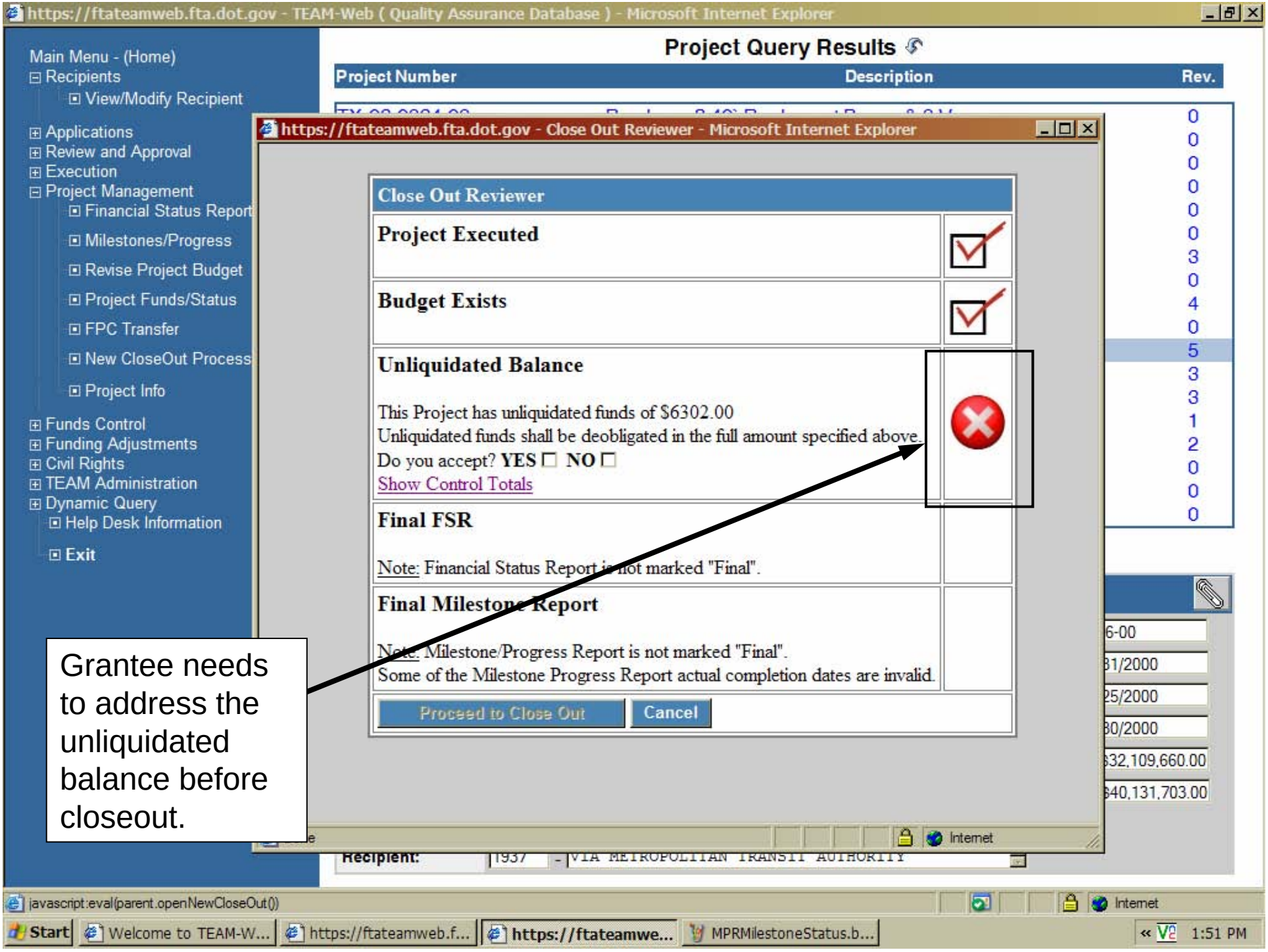
- Tie contracts to projects, not grants
- Develop a grant drawdown plan
- Report retentions in newest grant
- Complete projects and close grants within period of availability of funds

Grant Closeouts

- Refer to FTA Circular 5010.1C for closeout procedures
- Enter final FSR in TEAM-Web
  - Balance MUST match project funds/status screen
- Enter final MPR in TEAM-Web
  - Should include a discussion of each activity line item (ALI)
  - Must include a list of equipment purchased with grant funds (over $5K)

Grant Closeouts

- Enter final budget revision in TEAM-Web
  - Reflect actual project costs
  - Request to deobligate remaining funds
- Notify grant manager



Grantee needs to address the unliquidated balance before closeout.