

## FY 2024 Wake Transit Work Plan Request Instructions

### Wake Transit Sharepoint Site

For the FY 2024 Wake Transit Work Plan development process, agencies are to submit project funding request forms for the following:

- Any new operating project not already included in the FY 2024 base budget;
- Any capital project requested to be funded in FY 2024;
- Any changes in the scope of work for operating projects included in the FY 2024 base budget, regardless of funding amount; and
- Any increase in requested amount for operating projects over the FY 2024 base budget amount.

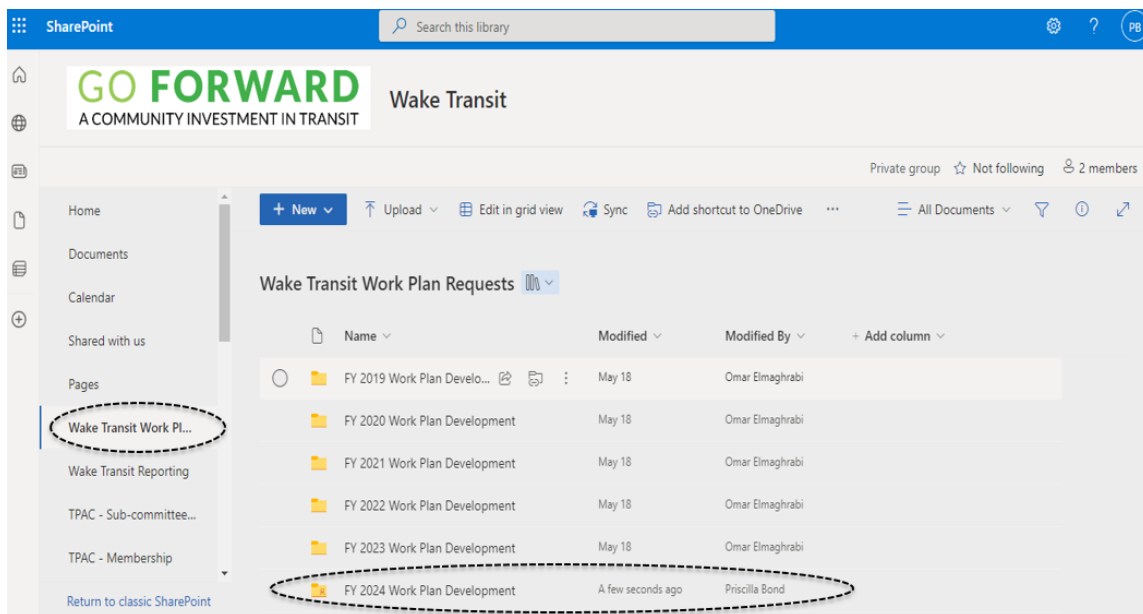
Although not essential, any changes to future-year programmed projects (FYs 2025-2030) in the adopted FY 2023 Wake Transit Work Plan should also be submitted through the Wake Transit Sharepoint site. New Community Funding Area Program project funding requests shall be submitted through the Community Funding Area Program call for projects and are exempt from these instructions.

The Wake Sharepoint Site is accessible at:

<https://gotriangle.sharepoint.com/sites/WakeTransit>

If you do not have access, or need help with login credentials or passwords, please email Priscilla Bond at [PBond@GoTriangle.org](mailto:PBond@GoTriangle.org)

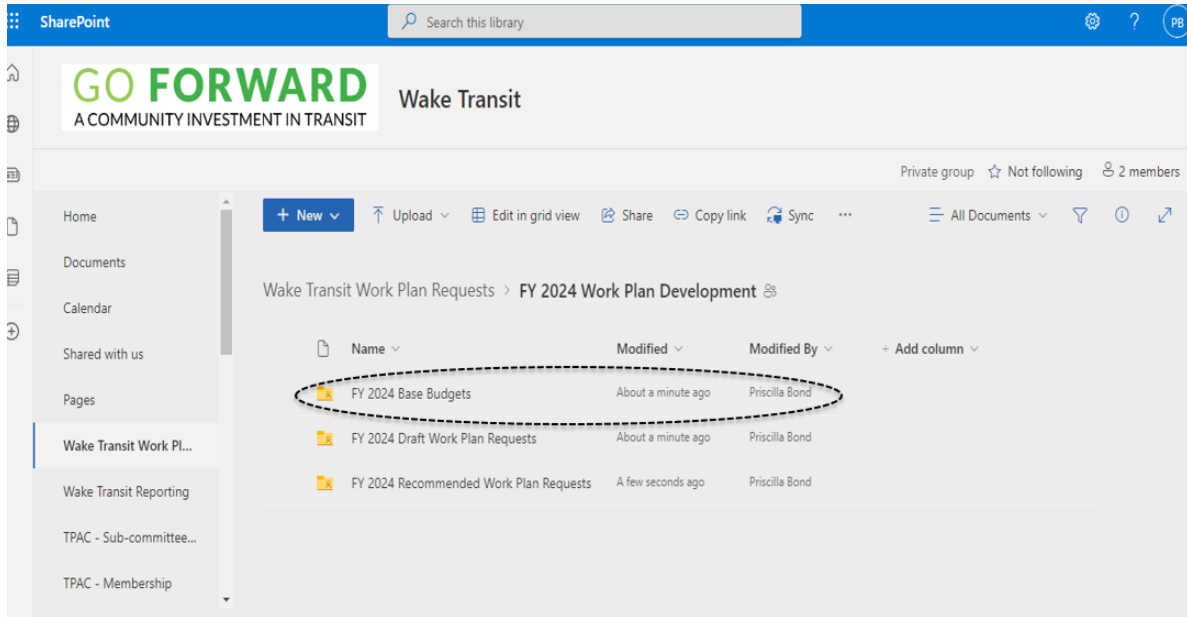
Information on the FY 2024 Wake Transit Work Plan development process is located in the FY 2024 Work Plan Development folder under Wake Transit Work Plan Requests.



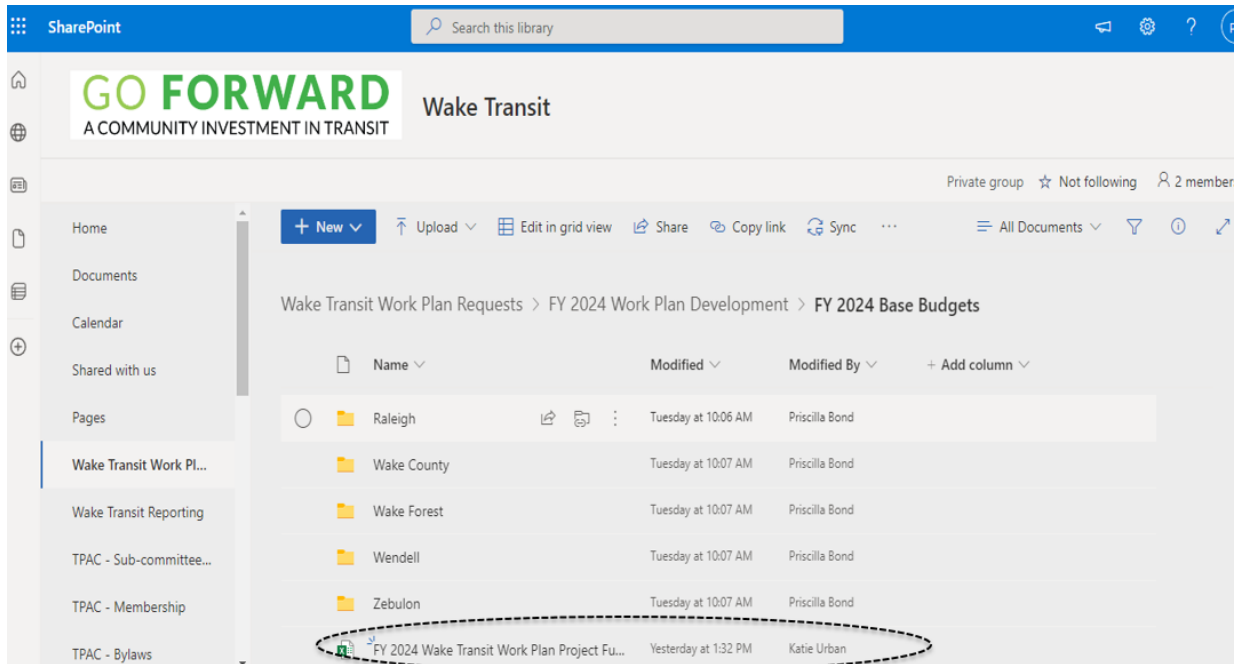
## **FY 2024 Base Budgets**

For FY 2024, agencies will find a FY 2024 base budget in their applicable folder on Sharepoint. These FY 2024 base budgets assume the amounts reported by agencies as the recurring cost from FY 2023 operating appropriations, which include the annualized cost of FY 2023 partial year funding, if applicable, and any other full year FY 2023 recurring appropriations inflated at 2.5 percent. This amount ties to the amounts shown in the multi-year operating program in the adopted FY 2023 Wake Transit Work Plan.

Base Budgets for each agency and municipality are located here:



Detailed line-item information that accounts for FY 2024 amounts shown in the multi-year operating program are located here:



Agencies and municipalities that received Wake Transit bus operations, transit plan administration, and tax district administration appropriations for FY 2023 shall review and verify these amounts and verify that the FY 2023 scopes of work, as written in the respective project profile sheets, are still applicable. If annualized costs for bus operations, transit plan administration, or tax district administration are projected to be less than what was previously identified and what is currently calculated as part of the FY 2024 base budget, agencies are requested to enter adjustments in the base budget adjustment column located in the individual agency FY 2024 base budget spreadsheet. If annualized costs for these items are projected to cost more than what is included in the base budget, that is considered an expansion request, and a project funding request form must be submitted.

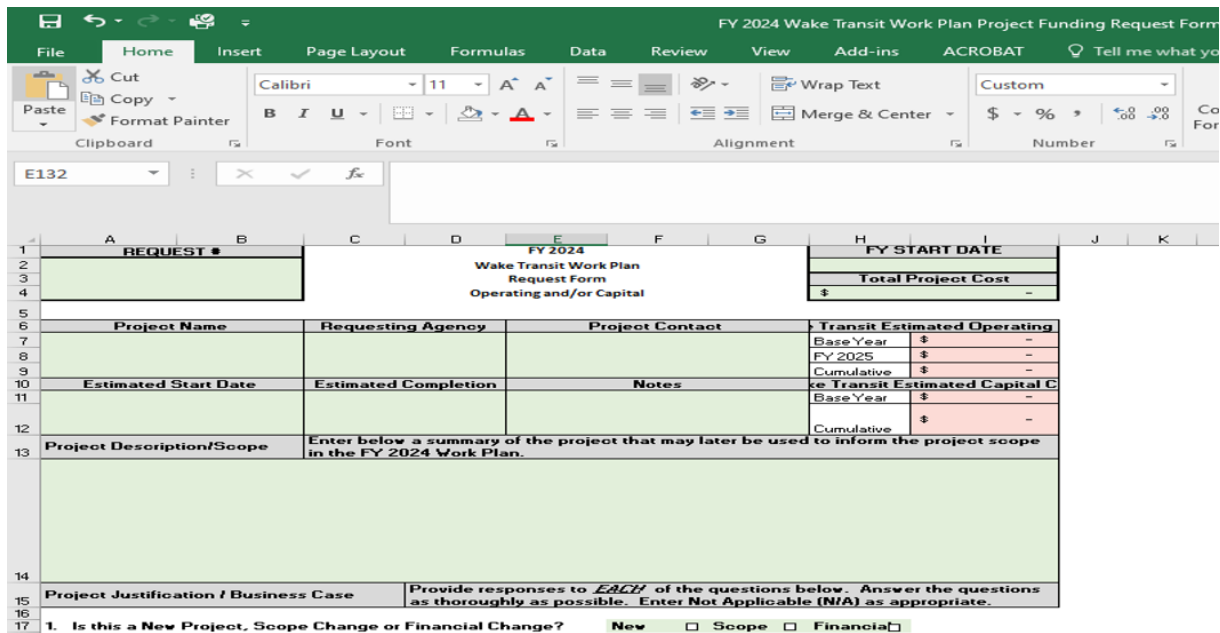
### **Project Funding Request Forms (Operating Expansion and Capital Requests)**

Agencies are highly encouraged to take time and effort, and to coordinate internally, before submitting requests for which funds are requested from Wake Transit sources. Inadequate information submitted in support of projects greatly diminishes the ability of the TPAC's Planning & Prioritization and Budget & Finance Subcommittees to evaluate projects for which Wake Transit funds are requested. It also prevents a sufficient narrative from being developed that tells the public, partner agencies, and other stakeholders about future Wake Transit projects in and with the Draft Wake Transit Work Plan to be released for public comment.

In order for an operating expansion or capital project funding request to be submitted, it must be submitted on the FY 2024 Wake Transit Work Plan Project Funding Request Form. A form should be submitted for each operating and/or capital project requested for funding by an agency. Request forms are required for:

- Scope changes to existing projects;
- Financial changes that are above the amount programmed in base budgets for FY 2024 for recurring operating appropriations; or
- New operating and capital projects requesting appropriations; projects previously only shown as programmed in FY 2024 require a Wake Transit Work Plan Project Funding Request Form to be filled out to be considered for appropriation of funds and elevation from programming.

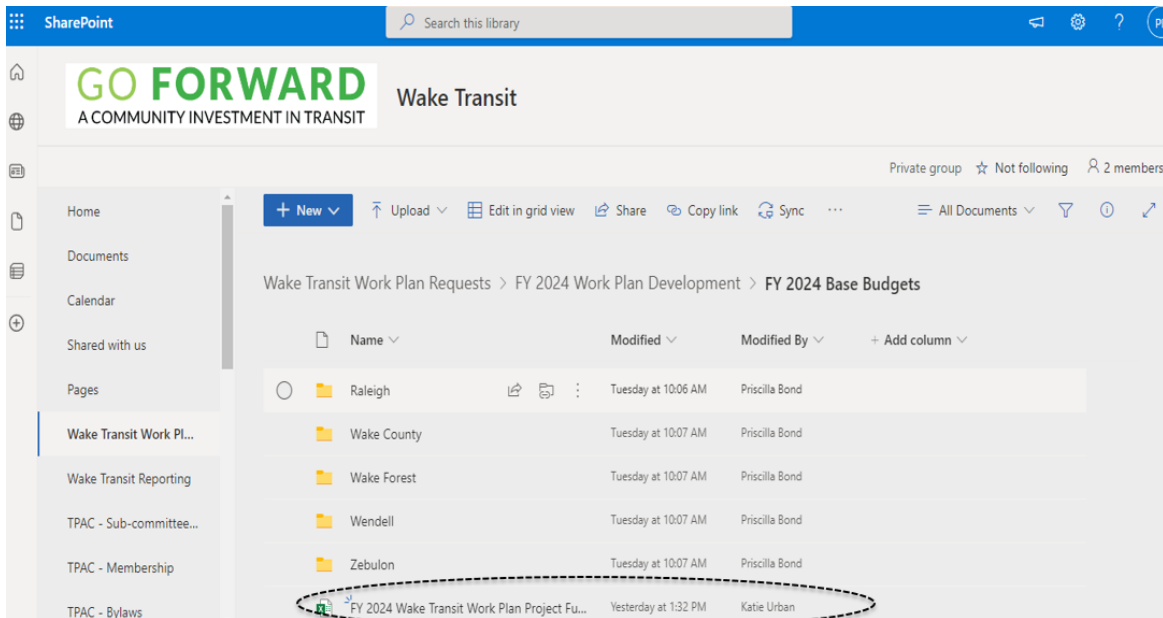
This form is in Microsoft Excel. The request form prompts project sponsors to include much of the narrative and financial information required to support the FY 2024 Work Plan Project Funding Request.



FY 2024 Wake Transit Work Plan Project Funding Request Form			
REQUEST #		FY 2024 Wake Transit Work Plan Request Form Operating and/or Capital	
			FY START DATE
			Total Project Cost
			\$ -
Project Name	Requesting Agency	Project Contact	Transit Estimated Operating
			Base Year \$ -
			FY 2025 \$ -
			Cumulative \$ -
Estimated Start Date	Estimated Completion	Notes	Transit Estimated Capital C
			Base Year \$ -
			Cumulative \$ -
Project Description/Scope	Enter below a summary of the project that may later be used to inform the project scope in the FY 2024 Work Plan.		
Project Justification / Business Case		Provide responses to <i>EACH</i> of the questions below. Answer the questions as thoroughly as possible. Enter Not Applicable (N/A) as appropriate.	
1. Is this a New Project, Scope Change or Financial Change? <input checked="" type="checkbox"/> New <input type="checkbox"/> Scope <input type="checkbox"/> Financial			

All requests are required to provide the anticipated start date in the fiscal year. Furthermore, capital project funding requests are required to be identified by phase, with anticipated start dates for each phase.

Blank project funding request forms are available on the Wake Transit Sharepoint Site:



## How to Submit Requests

Operating expansion and capital project funding requests to be funded in FY 2024 in full or in part by Wake Transit tax revenues are due by October 14, 2022.

Each agency should make sure to save a copy of ALL operating expansion requests and capital project funding requests in the unique folder for its requests on the Wake Transit Sharepoint site. Project requests should be saved with a version and date so that changes can be tracked as the FY 2024 process moves forward and subsequent versions are created. Agencies are encouraged to coordinate requests internally and to have one point of contact for submitting requests in agency folders.

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Name	Modified	Modified By	+ Add column
Apex	Tuesday at 10:09 AM	Priscilla Bond	
CAMPO	Tuesday at 10:09 AM	Priscilla Bond	
Cary			
GoTriangle	Tuesday at 10:09 AM	Priscilla Bond	
Raleigh	Tuesday at 10:09 AM	Priscilla Bond	

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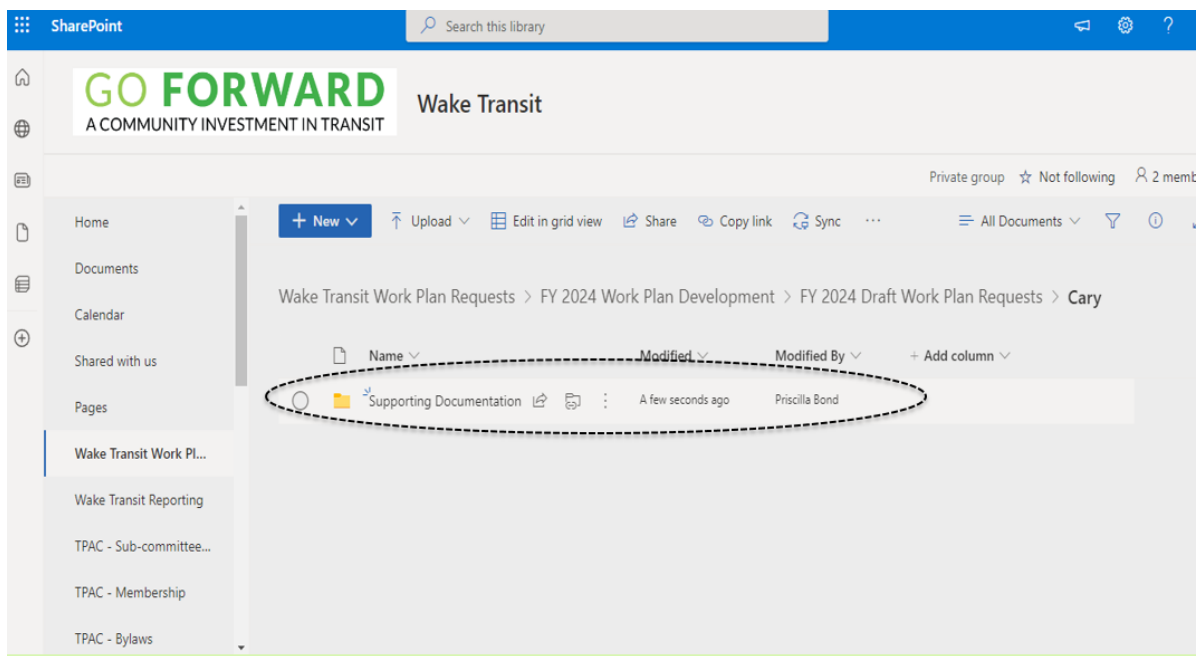
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Wake Transit Work Plan Requests > FY 2024 Work Plan Development > FY 2024 Draft Work Plan Requests > Cary

Name	Modified	Modified By	+ Add column
			

## **Supporting Documentation**

In addition to filling out the required information on the Wake Transit Work Plan Project Funding Request Form, agencies are required to submit graphics or other files in their agency folders that support the requests, if applicable. For bus operating projects, agencies are requested to attach a map showing the route or routes included in the request. For capital projects, agencies should submit pictures, maps, or schematics of proposed capital projects. This information will be used in the generation of the Draft FY 2024 Wake Transit Work Plan and to communicate project characteristics during the public comment period, on the GoForward website, and for presentations to various elected boards and commissions. This information should be labeled and included in an FY 2024 Work Plan Development Supporting Documentation folder.



## **FY 2024 Overall Process and Questions**

The Wake Transit Sharepoint Site will contain the FY 2024 kickoff presentation and the FYs 2023/2024 Work Plan Development, Amendment, and Quarterly and Annual Reporting Calendars.

Questions concerning the FY 2023 Work Plan development process should be directed to Evan Koff ([evan.koff@campo-nc.us](mailto:evan.koff@campo-nc.us) or 919-996-4177) or Anna Stokes ([anna.stokes@campo-nc.us](mailto:anna.stokes@campo-nc.us) or 919-996-4410).

REQUEST #

**FY 2024**  
**Wake Transit Work Plan**  
**Request Form**  
**Operating and/or Capital**

FY START DATE	
Total Project Cost	
\$	-

Project Name	Requesting Agency	Project Contact	Wake Transit Estimated Operating Cost	
			Base Year	\$ -
			FY 2025	\$ -
			Cumulative	\$ -
Estimated Start Date	Estimated Completion	Notes	Wake Transit Estimated Capital Cost	
			Base Year	\$ -
			Cumulative	\$ -

**Project Description/Scope** Enter below a summary of the project that may later be used to inform the project scope in the FY 2024 Work Plan.

**Project Justification / Business Case** Provide responses to EACH of the questions below. Answer the questions as thoroughly as possible. Enter Not Applicable (N/A) as appropriate.

1. Is this a New Project, Scope Change or Financial Change?      **New**  **Scope**  **Financial**

*See Instructions for definitions*

1a. If Scope Change or Financial Change - Indicate previous project ID

2. Is this project Operating, Capital or Both?      **Operating**  **Capital**  **Both**

3. Is this a one-time request?      **Yes**  **No**

4. What is the timeframe for the request? Are you requesting a full year of funds in FY24 or a partial year to be annualized in future fiscal years?

5. Where is this project located, who will this project serve and how will it improve service or overall implementation of the Wake Transit Plan?

6. Is this project programmed in the adopted FYs 2024-2030 Multi-Year Operating Program or CIP?      **Yes**  **No**

6a. If yes, how does this request relate to what was envisioned in the adopted Multi-Year Operating Program, CIP, or Wake Transit Plan? Specify which component(s) of the Multi-Year Operating Program, CIP, or Wake Transit Plan the request supports.



6b. If no, is this project in addition to projects and services included in the adopted Multi-Year Operating Program, CIP, or Wake Transit Plan or in lieu of projects and services included in those programs/plans?

7. Is the request identified in the Wake Bus Plan, Fixed Guideway Corridors MIS, any other Wake Transit governing board-adopted plans, or any other TPAC-endorsed plans or studies?

Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
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7a. If yes, how does this request relate to what was envisioned in these adopted or TPAC-endorsed plans or studies? Specify which component(s) of these plans or studies the request supports. If this request involves a capital or bus operating project, please include a map showing the location of the project as an attachment to this form.

8. What is the expected outcome(s) if this request is funded? What is the alternative if the request is not funded?

9. In the spring of 2019, the TPAC endorsed a set of reporting deliverables for various categories of Wake Transit Work Plan projects. A listing of these reporting deliverables by category is available here:

[Wake Transit Work Plan Project Reporting Deliverables](#)

If reporting deliverables are not already established for the category of the requested project, or if there is a need to deviate from the TPAC-endorsed reporting deliverables, please list the reporting deliverables that should be considered for this project below:

a)

b)

c)

10. Does the project funding request involve new acquisition of real property or a change to the scope or funding amount for a prior approved funding allocation for real property acquisition? If so, please refer to the adopted Policy Framework for Use of Wake Transit Funds to Acquire Real Property (available below) and submit the requested information outlined in Part III of the policy in a separate document if the subject real property acquisition meets the applicability thresholds outlined in Part II of the policy.

[Policy Framework for Use of Wake Transit Funds to Acquire Real Property](#)

11. Are you requesting to use Wake Transit tax revenues for art on the project? Yes  No

11a. Are you requesting funds to cover an artist retention fee for the design phase of the subject project? Yes  No

11b. If you are requesting funds to cover an artist retention fee for the design phase of the subject project, how much are you requesting (up to \$30,000)? \$  -

11c. Are you requesting art construction funds for the project at this time? Yes  No

11d. If you are requesting art construction funds, what is the total construction cost estimate for the project? \$  -

11e. If you are requesting art construction funds, what are the anticipated funding sources and respective shares of those anticipated funding sources for supporting the construction phase of the project?

Funding Source	Share

12. For bus operating projects, please provide:

a) Target Start Date				
b) Assets Used (Vehicles, etc.)				
c) Geographic Termini				
d) Major Destinations Served				
e) Annualized Revenue Hours				
f) Span of Service		Weekday	Saturday	Sunday
g) Frequency	<u>TIME PERIOD</u>	Weekday	Saturday	Sunday
	AM Peak			
	Midday			
	PM Peak			
	Evening			

13. If this is a bus operating project, which organization will operate the service?

14. If applicable, describe proposed responsibilities and duties for new staffing requests. Provide each major intended function, and the percentage of time devoted to each function.

15. List any other relevant information not addressed.

16. Please enter estimated revenues below. If there are other revenues besides Wake County Tax Revenue to support this request, please enter the anticipated revenue amounts next to the appropriate funding source for each fiscal year shown below.

Revenue							
	FY24	FY25	FY26	FY27	FY28	FY29	FY30
<b>Tax Revenue</b>							
Wake County Tax Revenue (Operating)	-	-	-	-	-	-	-
Farebox	-	-	-	-	-	-	-
Operating Revenue Subtotal	-	-	-	-	-	-	-
Wake County Tax Revenue (Capital)	-	-	-	-	-	-	-
<b>Other Revenue</b>							
Federal	-	-	-	-	-	-	-
State	-	-	-	-	-	-	-
Other	-	-	-	-	-	-	-
<b>Subtotal Other</b>	-	-	-	-	-	-	-
<b>TOTAL REVENUE</b>	-	-	-	-	-	-	-

17. For Non-Wake County Tax Revenue (federal, state, other), who is the proposed recipient(s) and who will be in charge of applying for those funds? Please provide status of other revenues (Application submitted, Committed, Awarded, Other).

18. Please enter estimated appropriations to support expenses. Enter FY 2024 and the estimated annualized cost in FY 2025 using the 2.5% growth factor, if applicable. The spreadsheet will calculate 2026 and beyond by 2.5%. If your project is not expected to have recurring costs in FY 2026 and/or beyond, delete the calculation(s) in columns E-H.

Cost Break Down of Project Request							
	FY24	FY25	FY26	FY27	FY28	FY29	FY30
<b>OPERATING COSTS</b>							
Growth Factors		2.50%	2.50%	2.50%	2.50%	2.50%	2.50%
Salary & Fringes			-	-	-	-	-
Contracts			-	-	-	-	-
Bus Operations:							
Estimated Hours			-	-	-	-	-
Cost per Hour			-	-	-	-	-
Estimated Operating Cost	-	-	-	-	-	-	-
Bus Leases			-	-	-	-	-
Park & Ride Lease			-	-	-	-	-
Other			-	-	-	-	-
Other			-	-	-	-	-
Subtotal: Bus Operations	-	-	-	-	-	-	-
Other (Describe)			-	-	-	-	-
Other (Describe)			-	-	-	-	-
Other (Describe)			-	-	-	-	-
<b>TOTAL OPERATING COSTS</b>	-	-	-	-	-	-	-

19. Please enter Operating category that best represents the project above (This will be reviewed during Work Plan development)

Bus Operations 
 Transit Plan Administration 
 Tax District Administration

20. Please enter estimated appropriations to support contractual commitments and other expenses related to proposed capital projects.

CAPITAL COSTS	FY24	FY25	FY26	FY27	FY28	FY29	FY30
Design							

Construction	-	-	-	-	-	-	-
Equipment							
Land - Right of Way							
Other							
<b>TOTAL CAPITAL COSTS</b>	-	-	-	-	-	-	-

21. For multi-phase capital projects, please indicate the respective fiscal quarter and fiscal year each phase will begin and end using the timeline structure provided below.

	Fiscal Quarter and Fiscal Year Begin	Fiscal Quarter and Fiscal Year End
Design		
Construction		
Equipment		
Land - Right of Way		
Other		

22. Please enter Capital category that best represents the project above (This will be reviewed during workplan development)

Bus Infrastructure 
 Bus Acquisition 
 BRT 
 CRT 
 Other

*Assumptions for Costs and Revenues Above:*

23. Please state any assumption(s) used to calculate the capital and operating dollars and revenues shown above.