

FY 2025 Wake Transit Work Plan Request Instructions

Wake Transit Sharepoint Site

For the FY 2025 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 2025 base budget;
- Any capital project requested to be funded in FY 2025;
- Any changes in the scope of work for operating projects included in the FY 2025 base budget, regardless of funding amount; and
- Any increase in requested amount for operating projects over the FY 2025 base budget amount.

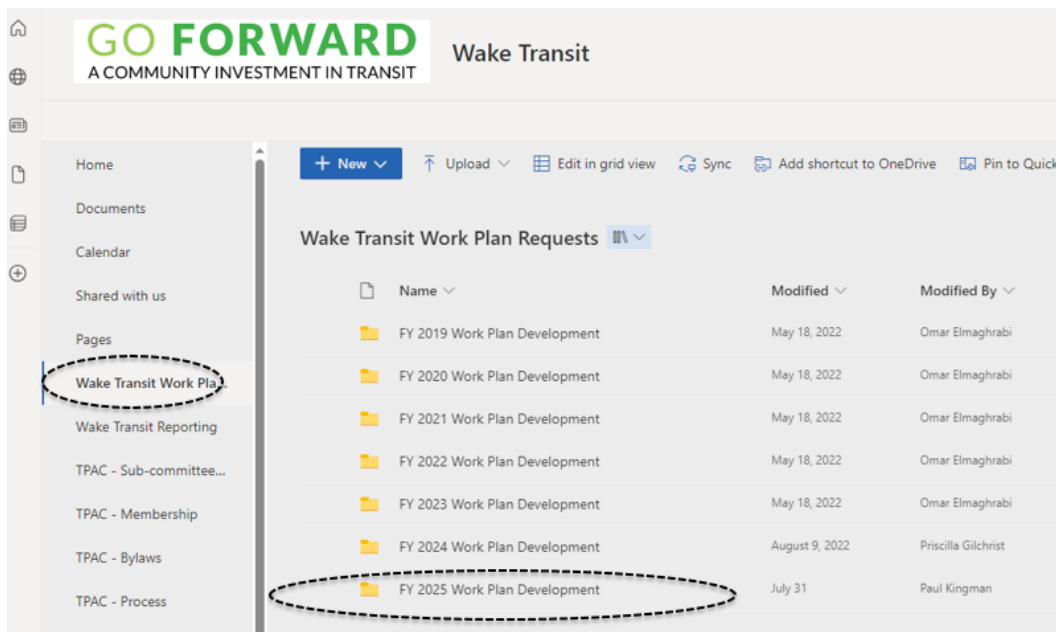
Any changes to future-year programmed capital projects (FYs 2026-2030) in the adopted FY 2024 Wake Transit Work Plan should also be submitted through the Wake Transit Sharepoint site using the CIP Guidance Form in the Project Sponsor's Base Budget folder. Community Funding Area Program (CFAP) project 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

Information on the FY 2025 Wake Transit Work Plan development process is located in the FY 2025 Work Plan Development folder under Wake Transit Work Plan Requests.

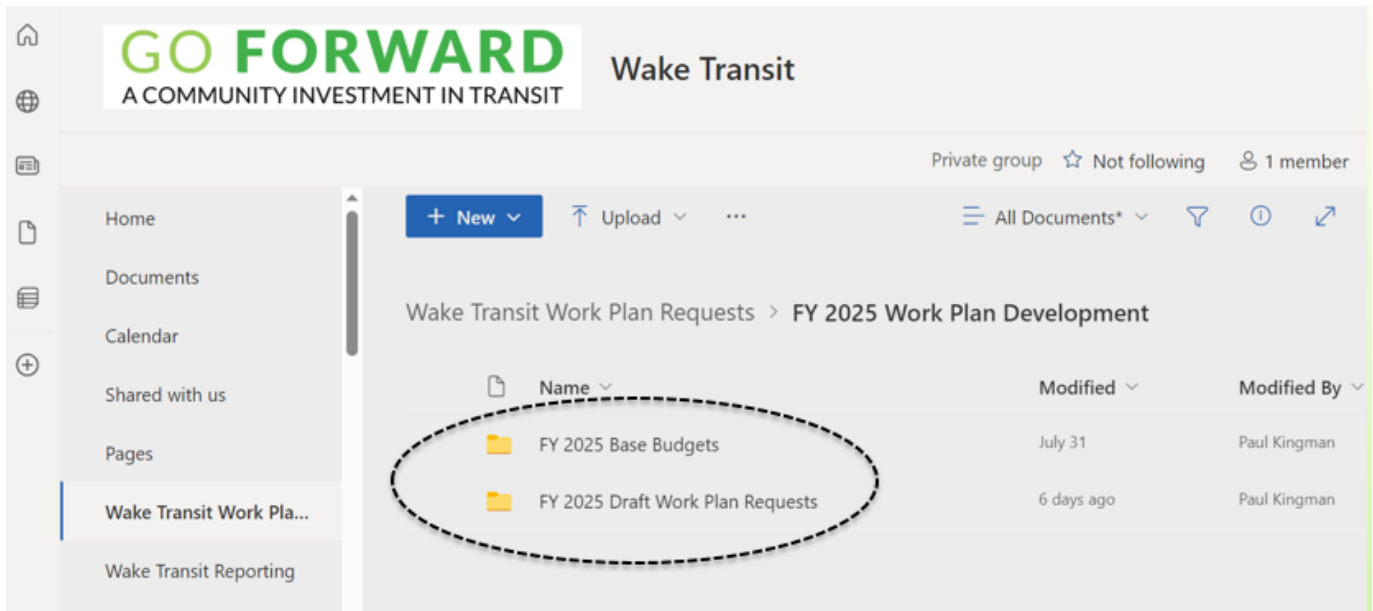


FY 2025 Base Budgets

For FY 2025, agencies will find a FY 2025 base budget in their applicable folder on Sharepoint. These FY 2025 base budgets assume the amounts reported by agencies as the recurring cost from FY 2024 operating appropriations, which include the annualized cost of FY 2024 partial year funding, if applicable, and any other full year FY 2024 recurring appropriations inflated at 2.5 percent. This amount ties to the amounts shown in the multi-year operating program in the adopted FY 2024 Wake Transit Work Plan.

Detailed line-item information that accounts for FY 2025 amounts shown in the multi-year operating and capital program.

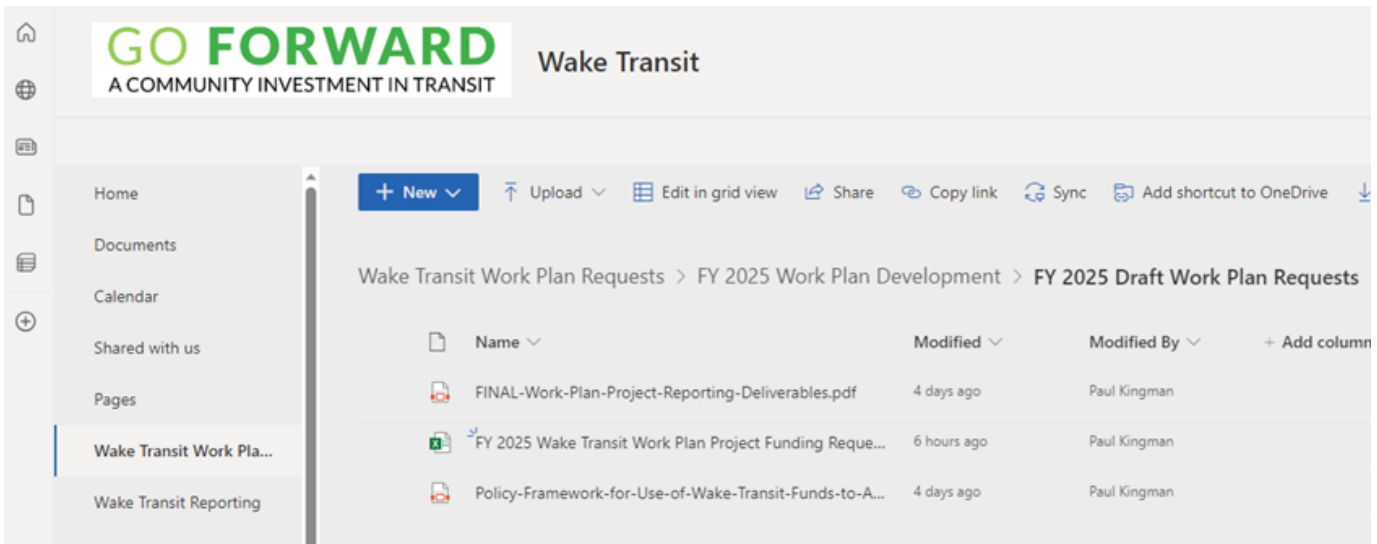
Base Budgets for each agency and municipality are located here:



Agencies and municipalities that received Wake Transit bus operations, transit plan administration, and tax district administration appropriations for FY 2024 shall review and verify these amounts and verify that the FY 2024 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 2025 base budget, agencies are requested to enter adjustments in the base budget adjustment column located in the individual agency FY 2025 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 Program Development (PD) Subcommittee 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 2025 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 2025 for recurring operating appropriations; or
- New operating and capital projects requesting appropriations; projects previously only shown as programmed in FY 2025 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.

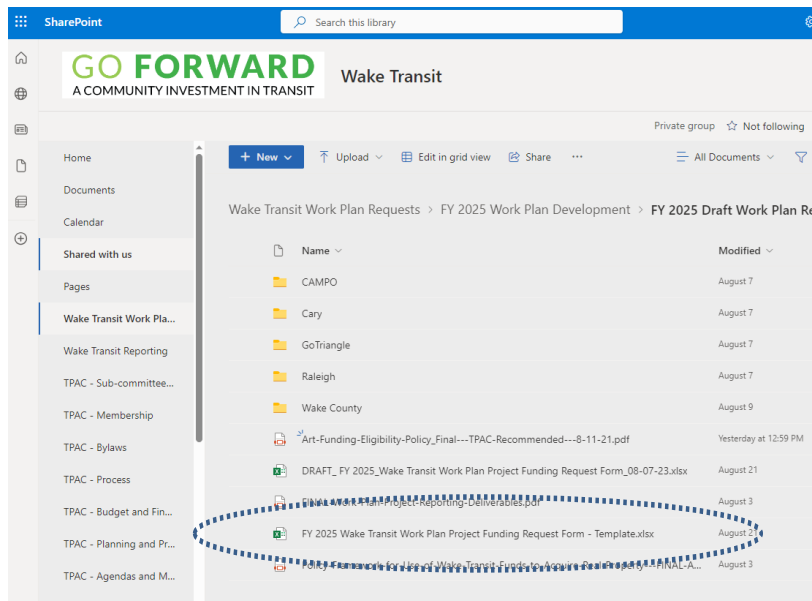
This form is in Microsoft Excel. The request form prompts project sponsors to include much of the narrative and financial information required to support the FY 2025 Work Plan Project Funding Request.

REQUEST #	FY 2025 Wake Transit Work Plan Request Form Operating and/or Capital		FY START DATE	
			Jul 2025	
			Total Project Cost	
			\$	-

Project Name	Requesting Agency	Project Contact	Wake Transit Estimated Operating Cost	
			Base Year	\$ -
			FY 2026	\$ -
			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 description in the FY 2025 Work Plan.			
Project Justification / Business Case	Provide responses to <u>EACH</u> of the questions below. Answer the questions as thoroughly as possible. Enter Not Applicable (N/A) as appropriate.			

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.

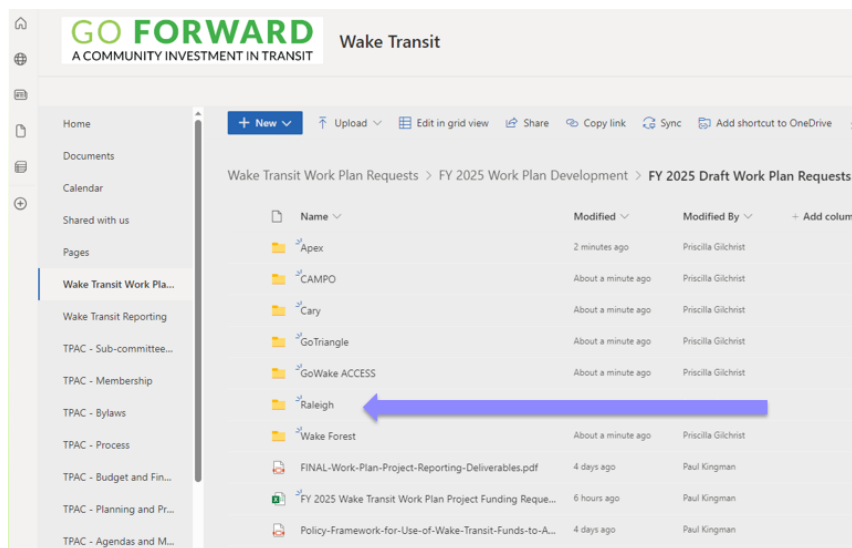
Blank project funding request forms are available on the Wake Transit Sharepoint Site:



How to Submit Requests

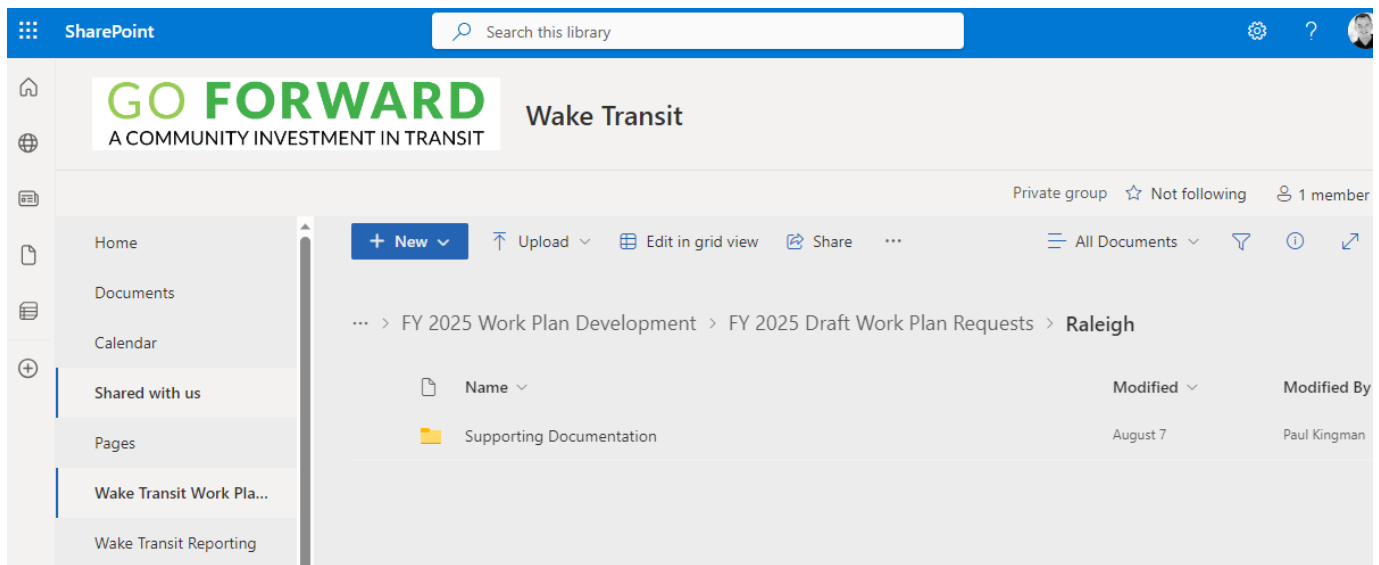
Operating expansion and capital project funding requests to be funded in FY 2025 in full or in part by Wake Transit tax revenues are due by October 13, 2023.

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 2025 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.



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 2025 Overall Process and Questions

The Wake Transit Sharepoint Site will contain the FY 2025 kickoff presentation and the FYs 2024/2025 Work Plan Development and Amendments.

Questions concerning the FY 2025 Work Plan development process should be directed to Evan Koff (evan.koff@campo-nc.us or 984-542-3607) or Ben Howell (ben.howell@campo-nc.us or 984-542-3609).

REQUEST #

**FY 2025
Wake Transit Work Plan
Request Form
Operating and/or Capital**

FY START DATE	
Jul	2025
Total Project Cost	
\$	-

Project Name	Requesting Agency	Project Contact	Wake Transit Estimated Operating Cost	
			Base Year	\$ -
			FY 2026	\$ -
			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 description in the FY 2025 Work Plan.			
Project Justification / Business Case	Provide responses to <i><u>EACH</u></i> of the questions below. Answer the questions as thoroughly as possible. Enter Not Applicable (N/A) as appropriate.			

Please detail project justification:

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 FY25 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 2025-2030 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?

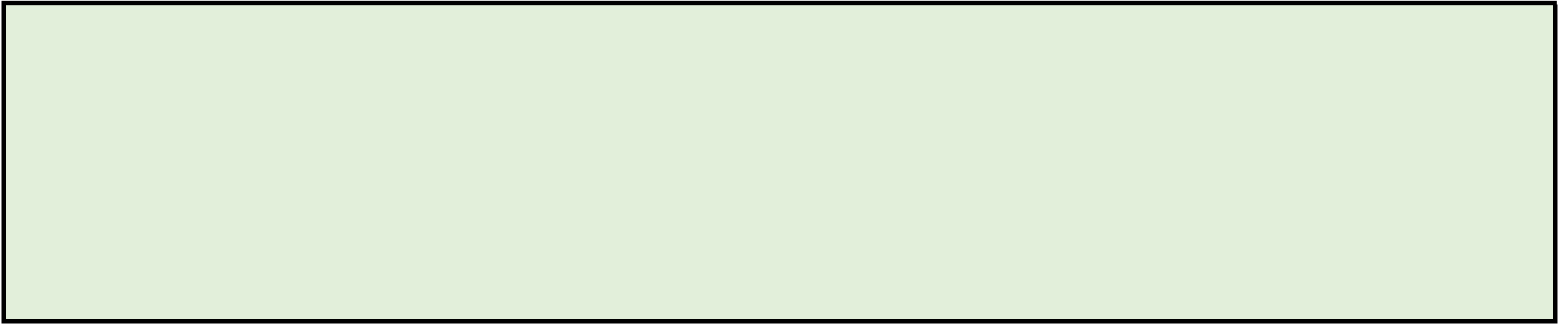
7. Is the request identified in the ~~Wake Bus Plan, Fixed Guideway Corridors MIS,~~ any other Wake Transit governing board-adopted plans, or any other TPAC-endorsed plans or studies?

Yes

No

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. Specify goals and outcomes desired by final project completion. 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 impact/alternative if the request is not funded?



9. 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 and on Sharepoint:

[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 <input type="checkbox"/>		No <input type="checkbox"/>
11a. Are you requesting funds to cover an artist retention fee for the design phase of the subject project?	Yes <input type="checkbox"/>		No <input type="checkbox"/>
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 <input type="checkbox"/>		No <input type="checkbox"/>
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
	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 task**, ~~and the percentage of time devoted to each function.~~

15. List any other project 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						
Tax Revenue	FY25	FY26	FY27	FY28	FY29	FY30
Wake County Tax Revenue (Operating)	-	-	-	-	-	-
Farebox	-	-	-	-	-	-
Operating Revenue Subtotal	-	-	-	-	-	-
Wake County Tax Revenue (Capital)	-	-	-	-	-	-
Other Revenue						
Federal	-	-	-	-	-	-
State	-	-	-	-	-	-
Other	-	-	-	-	-	-
Subtotal Other	-	-	-	-	-	-
TOTAL REVENUE	-	-	-	-	-	-

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 2025 and the estimated annualized cost in FY 2026 using the 2.5% growth factor, if applicable. The spreadsheet will calculate 2027 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

OPERATING COSTS	FY25	FY26	FY27	FY28	FY29	FY30
Growth Factors		2.50%	2.50%	2.50%	2.50%	2.50%
Transit Plan Administration	-	-	-	-	-	-
Salary & Fringes	-	-	-	-	-	-
Contracts	-	-	-	-	-	-
Bus Operations:						
Estimated Hours	-	-	-	-	-	-
Cost per Hour	-	-	-	-	-	-
Estimated Operating Cost	-	-	-	-	-	-
Bus Leases	-	-	-	-	-	-
Park & Ride Lease	-	-	-	-	-	-
Maintenance	-	-	-	-	-	-
Other	-	-	-	-	-	-
Subtotal: Bus Operations	-	-	-	-	-	-
Bus Rapid Transit (BRT) Operations	-	-	-	-	-	-
Other (Describe)	-	-	-	-	-	-
Other (Describe)	-	-	-	-	-	-
TOTAL OPERATING COSTS	-	-	-	-	-	-

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

Tax District Administration Transit Plan Administration Bus Operations BRT Operations

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

CAPITAL COSTS	FY25	FY26	FY27	FY28	FY29	FY30
Planning	-	-	-	-	-	-
Design	-	-	-	-	-	-
Construction	-	-	-	-	-	-
Equipment	-	-	-	-	-	-
Right of Way / Land Acquisition	-	-	-	-	-	-
Other	-	-	-	-	-	-
TOTAL CAPITAL COSTS	-	-	-	-	-	-

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
Planning		
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. (include details)