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Description of document: **List(s) of periodic employee colloquia, brown bag lunch talks, and employee seminar discussions held at the Federal Transit Administration (FTA) Headquarters 2006 – 2008**

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U.S. Department  
of Transportation  
**Federal Transit  
Administration**

1200 New Jersey Avenue S.E.  
Washington, D.C. 20590

**SEP 22 2008**

Our File No. FY08-0194

This is in response to your e-mail requesting information under the Freedom of Information Act (FOIA). Specifically, you requested a copy of the, "list(s) of periodic employee colloquia, brown bag lunch talks, and employee seminar discussions held at the Federal Transit Administration (HQ) in 2006, 2007 and 2008, preferably including their title/subject, the speaker and date."

We have searched our files and found documents responsive to your request, which we have enclosed. The duplication fee for this document is negligible and is waived pursuant to the FOIA and the Department of Transportation regulations, 49 C.F.R. §7.44 (c).

I hope this information meets your needs.

Sincerely,

A handwritten signature in black ink, appearing to read "Tommy Carter", with a large, sweeping flourish extending to the right.

Tommy Carter  
Director, Office of Management  
Planning

Enclosure

Presentation Date	Speaker Name	Topic
September 7, 2006	Kenneth Orski, publisher of Innovation Briefs	1)What should be the role of FTA in public transportation? 2)How will congestion mitigation impact public transportation? 3)How do we turn public/private partnerships from theory into reality in public transportation projects?
September 22, 2006	Robert W. Poole, Jr., Director of Transportation Studies, Reason Foundation	Relieving Traffic Congestion in America's Metropolitan Areas
November 2, 2006	Alan E. Pisarski, independent consultant	<i>Commuting in America, I, II, and III</i>
February 28, 2007	Paul Weyrich, CEO of the Free Congress Research and Education Foundation	Federal Transit Policy and Public Transportation
April 3, 2007	David Lewis, HLB, Inc.	Identifying the Benefits of Public Transportation
April 5, 2007	Christopher Zimmerman, Arlington County, VA, Board of Supervisors	Public Transportation and Land Development in Arlington County, VA
November 5, 2007	No speaker	Reauthorization Town Hall
December 4, 2007	Joseph Aldy	Reauthorization Retreat: US Climate Change Policy and the Transportation Sector
January 17, 2008	No speaker	Brown Bag: Non-Urbanized Area Program
January 24, 2008	No speaker	Brown Bag: Planning Programs and Climate Change
January 31, 2008	No speaker	Brown Bag: Transit System Improvement Program
February 7, 2008	No speaker	Brown Bag: Program Incentives and/or an Incentive Program
February 14, 2008	No speaker	Brown Bag: Research and Innovation Program
February 21, 2008	No speaker	Brown Bag: Safety, Security and Emergency Response
March 6, 2008	No speaker	Brown Bag: Project Delivery and Streamlining
March 13, 2008	Robert Stanley and James McLary	Policy Forum: Mobility Management and the New Paradigm Studies
March 20, 2008	No speaker	Brown Bag: Innovative Financing

# Biweekly Conference Calls – Headquarters and Regional Offices

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## August 2008

8/11/08

- Discussion of Enhancement of Bi Weekly Regional Conference Call - Susan Wallace - TAD & Darren Jaffe - TPM
- Grantee Engine Maintenance Issue – Darren Jaffe - TPM
- Annual Oversight Meeting (2008 and 2009) – Deb Bilek - TPM
- Calls for Discussion of SOPs – Nydia Picayo – TPM
- 2008 United We Ride Leadership Awards – Pam Brown - TPM
- Regional Questions/Comments

## July 2008

7/28/08

- GAO Review of Triennial Review Program - Robert Owens
- Update on State of Good Repair Summit – Dale Wegner
- Grants Management Meeting in FY 2009 - Nydia Picayo
- Update on Final Circulars - Nydia Picayo
- Update FMO Resource Guide - Linda M. Barnes
- Funds Transfers Under JARC/New Freedom Programs - David Schneider & Nancy Grubb
- Discussion of Enhancement of Bi Weekly Regional Conference Call - Susan Wallace & Darren Jaffe
- Regional Questions/Comments

7/14/08

- Info/Update: FTA/FHWA Planners Seminar and FTA-only Meeting (July 22-25) – Victor Austin
- Regional Questions/Comments

## June 2008

6/30/08

- CEO Safety Summit on 7/23/08 & 7/24/08 – Esther White
- Update on FTA C 9300.1B circular – Nydia Picayo
- Status of Over-the-Road Bus Announcement for 2007 and 2008 OTRB Award Recipients – Blenda Younger
- Transit Safety and Security Roundtable – Bridget Zamperini
- Update on Connecting Communities Program – Bridget Zamperini
- Regional Questions/Comments

# **Biweekly Conference Calls – Headquarters and Regional Offices**

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**6/16/08**

- TEAM User/Grants Management System Steering Committee Meeting – Walt Mokey
- Regional Input on JARC/New Freedom Grant Applicant SMP/PMPs – David Schneider
- Staffing Update for Section 5310 Program – David Schneider
- Award of the SMR Contracts – Tretha Chromey
- OTrak - Release of Version 9.0 – Tretha Chromey
- Regional Questions/Comments

**6/2/08**

- FTA Planners Meeting - July 22, 2008 – Victor Austin and James Garland
- Charter Bus Changes for Triennial Reviews – Crystal Peyton
- TPM Oversight Calendar – Tretha Chromey
- 2009 Oversight Program – Khuong Luu
- Regional Questions/Comments

**May 2008**

**5/19/08**

- FTA “Outstanding Achievement Award for Excellence in Environmental Document Preparation” – Julie Atkins
- PSR Assignments – Jim Muir
- Treasury \$50 Million Rule – Michael Whitaker
- HR 1195 (SAFETEA-LU Technical Corrections) – Rita Maristch
- Program Guidance Tool - User Acceptance (UA) Testing – Nydia Picayo
- Tribal and Clean Fuels NOFAs – Lorna Wilson
- Regional Questions/Comments

**5/5/08**

- Status of Action Items from Oversight Conference – Deborah Bilek
- Status of the Over-the-Road Bus awards for 2007 & 2008 funds – Henrika Buchanan-Smith
- Changes to New Freedom Guidance – David Schneider
- Status Updates of Circulars – Nydia Picayo

**April 2008**

**4/21/08**

- DHS Transportation Security Grant Program – Bridget Zamperini
- FTA Contact Us Tool – Ketrina Nelson, TCA
- DOT eGrants Initiative and TEAM / HHS-ACF Fit-Gap Analysis of the Grants Management System - Walt Mokey, TPM
- JARC and New Freedom Supplemental Agreement – Henrika Buchanan-Smith, TPM

# **Biweekly Conference Calls – Headquarters and Regional Offices**

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- Update on Information Sessions – Nydia Picayo, TPM
- Regional Questions/Comments

**4/7/08**

- FTA/FHWA Planner's Seminar in July – Victor Austin, TPE
- Coordinated Plan planning process during the Planning Certification Review – Charlie Goodman, TPE
- Status of State Management Review Contract – Tretha Chromey, TPM
- Frequency of Information Sessions – Nydia Picayo, TPM
- Lapsing Earmarks – Henrika Buchanan-Smith, TPM
- Procurement System Review and Workshops – Jim Muir, TPM
- Regional Comments, Questions

**March 2008**

**3/24/08**

- Annual Oversight Conference – Vince Valdes, TPM
- Recent Changes to 5310/JARC/NF Q &A Document on the Topic of Coordinated Planning - David Schneider, TPM
- Requirements for Milestone Progress Report and Financial Status Report –Nydia Picayo, TPM
- Energy Act Provisions: CMAQ Federal Share – Darren Jaffe, TPM
- Regional Comments, Questions

**February 2008**

**2/25/08**

- United We Ride Policy Issues – Mary Martha Churchman/Doug Birnie, TPM
- NTI Training – Candace Noonan, TPE
- ECHO Questions Follow-up – Gwen Daniel, TBP
- Annual Oversight/Grants Management Meeting – Deborah Bilek, TPM
- ARC New Freedom Program Implementation Update – David Schneider, TPM
- Regional Comments, Questions

Attachments and related items on ECHO from Monday February 25, 2008 meeting:

- Response to ECHO Issues from Bi-Weekly Summary 2 11 08 Final.doc
- ECHO-Web Registration Package (Jan 2008)rev.pdf
- Internal Guidance Document for ECHO Processor (FY2008)rev.doc
- Overview4ECHOGrantPayment(Feb 2008)rev.ppt

# Biweekly Conference Calls – Headquarters and Regional Offices

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2/11/08

- Joint FHWA and FTA Planning Seminar – Victor Austin, TPE
- New Starts Report – Beth Day, TPE
- ECHO and Establishing New Grantees – Michael Whitaker, TBP
- Annual Oversight Meeting, Continuous Improvement of Oversight Program and Re-authorization Oversight Working Group – Deborah Bilek, TPM
- 2008 State Management Review Contract Status and new items – Tretha Chromey, TPM
- 2008 Procurement System Review Contract Status and new item - 2008 PSR Workshops – Jim Muir, TPM
- Regional Comments, Questions

January 2008

1/14/08

- **Charter Bus Final Rule** (Please see two attachments: **Fact Sheet** and **Briefing**) - Linda Lasley, TCC/TOA
- Procedures for the transfer of flex funds (CMAQ and STP) from FHWA to FTA HQ and to the Regions – Kris Clarke, TBP
- Status of the Apportionments/Allocations Notice and status of earmark extensions – Mary Martha Churchman, TPM
- Backlog of Guidance questions/Guidance Contacts – Nydia Picayo, TPM
- TEAM-web Password Changes – Walt Mokey, TPM (Walt is unable to attend call but has provided the attached notes)
- Regional Comments, Questions

December 2007

12/17/07

- Administrative Modifications vs. Amendments in Metropolitan Transportation Plans, TIPs, and STIPs. Reference: Statewide Transportation Planning; Metropolitan Transportation Planning: Final Rule (from <http://www.fta.dot.gov/planning/metro/regs/>) Region planners are asked to provide examples of thresholds cited in planning MOUs. – Darin Allan, TPE
- AASHTO Multistate Technical Assistance Program Meeting – David Schneider, TPM
- Continuing Resolution – Mary Martha Churchman, TPM
- NTD Ridership Numbers – Keith Gates, TBP
- Two Year Pilot of In-Kind Match for Intercity Bus – Mary Martha Churchman, TPM
- Changes to TEAM - New passwords and their complexity – Walt Mokey, TPM
- Regional Comments, Questions

12/3/07

- No agenda items for this call.
- Region 10 announced award of their first Urban Partnership grant.

# Biweekly Conference Calls – Headquarters and Regional Offices

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## November 2007

11/19/07

- PMO update – Steve Asatoorian, TPM
- Oversight Updates: SMR, PSR and Triennial, etc. – Khuong Luu, TPM
- Transit Trends Reporting/OTRAK Data – Deborah Bilek, TPM
- Reauthorization Activities - Joanne Waszczak, TBP
- Congestions Reduction Demonstration Notice – Mary Martha Churchman, TPM
- Continuing Resolution – Kris Clarke, TBP
- Review of Regional Guidance – Nydia Picayo, TPM
- Regional Comments, Questions

## October 2007

10/22/07

- MPO and Designated Recipient Program Authority for Section 5307 Funds– Mary Martha Churchman, TPM and Charlie Goodman, TPE
- TEAM FY 08 Project List of Candidates for Closure – Walt Mokey, TPM
- Triennial Review Program Consultants Kick-Off Meeting Update – Khuong Luu, TPM
- Toll Revenue Credits: How to calculate the allowable credit in lieu of the SAFETEA-Lu changes <http://www.fhwa.dot.gov/specialfunding/020807.cfm> – Nydia Picayo, TPM
- Deadline for receipt of new/revised State Management Plans and large urbanized area Program Management Plans (JARC/NF/5310 and 5311) – David Schneider, TPM
- Update on the ATPPL project selections – Scott Faulk, TPM 7. Regional Comments, Questions

10/09/07

- TEAM – Gwen Daniel, TBP
- Coordination of Conference Calls between Headquarters and Regions – Larry Penner, TRO-2
- Status on Triennial Review – Vince Valdes, TPM
- Status of Certifications and Assurances – Vince Valdes, TPM
- Reauthorization Update – Mary Martha Churchman, TPM
- Local Coordinated Plans - David Schneider, TPM
- Regional Comments, Questions

## September 2007

9/24/07

- Managerial Cost Accounting/LDR – Peter Chipman, TBP-20
- Annual Grantee Oversight Assessment – Research Recipients – Bruce Robinson, TRI-1



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- Publication of Notice of Availability for Circulars – Nydia Picayo, TPM-40
- Status on Triennial Review Contract – Vince Valdes, TPM-40
- Status of PMO Contract – Jessica Shaw, TPM-20
- FTA Order 7001.1A, “Regulation, Policy and Guidance Development Process.” - Tim Steinitz, TBP-12
- FTA’s Reauthorization Town Hall and Reauthorization Website on FTAnet – Tim Steinitz, TBP-12
- New JARC and New Freedom Updates - David Schneider, TPM-10:
  - web pages on [www.fta.dot.gov](http://www.fta.dot.gov)
  - 5310/JARC/New Freedom program rollout questions and answers
  - Designated recipients for JARC and New Freedom programs
  - Local Coordinated Plans
- Regional Comments, Questions

## 9/10/07

- Report on NS Con Fab – Sean Libberton, TPE-21
- EMT Circular Review Schedule – Nydia Picayo, TPM-40
- Reserving state administration funds in TEAM for the JARC and New Freedom Programs – Mary Martha Churchman, TPM-10
- Extension of funds that have lapsed in FY ‘06 – Mary Martha Churchman, TPM-10
- Grants at Department of Labor, Ken Johnson, TPM-10
- Urban Partnership Program – Sherry Riklin, TPE-2
- Regional Comments, Questions

## August 2007

### 8/27/07

- “Beyond ADA” – David Schneider, TPM-10
- CTAA Paid for Travel – Pam Bell, TPM-1
- Circular Revision Schedule – Cheryl Hershey, TPM-40
- Urban Partnership Program – Sherry Riklin, TPE - 2
- Regional Comments, Questions

### 8/13/07

- LDR Task Number for Minnesota Bridge Activity – Peter Chipman – TBP
- Targeted Technical Metropolitan Planning Assistance – Darin Allan – TPE-12
- Leadership Effectiveness Inventory (LEI) Assessment – Bill Harvey – TAD-30
- Update on Bus Discretionary Program NOFA – Mary Martha Churchman TPM-10
- TEAM – Preparing for End of Year Rush - Jacquelynn Lopez and Gwen Daniel
- 2008 Grantee Oversight Assessment - Tretha Chromey-TPM-41
- 2008 Triennial Review and State Management Review Workbook Status- Khuong Luu and Tretha Chromey- TPM-41
- 2008 Oversight contract Status- Khuong Luu-TPM-41
- Regional Comments, Questions

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## July 2007

7/30/07

- Report from San Francisco New Starts Roundtable and future Washington D.C. Roundtable – Dwayne Weeks – TPE-21
- Status of Circular Revisions – Matt Lesh TPM-42
- Update on Bus Discretionary Program – Mary Martha Churchman TPM-10
- 2007 State Programs Meeting – Mary Martha Churchman TPM-10
- Regional Comments, Questions

7/16/07

- Update on LDR – Peter Chipman TBP-20
- Update on SAFETEA-LU Implementation and Deliverables – Tim Steinitz TBP-12
- 2008 Grantee Oversight Assistance - Tretha Chromey TPM-41
- 2008 Triennial Review and State Management Review Workbook updates – K. Luu TPM-41
- Financial Management Oversight – Linda Barnes TPM-41
- Status Update on Lapsing Earmarks – Mary Martha Churchman TPM-10
- Regional Comments, Questions

7/02/07

- Highlights on Overview Conference – Khuong Luu
- Discretionary Bus Program – Henrika Buchanan-Smith
- Region Comments

## June 2007

6/18/07

- Labor Distribution Reporting – Kris Clarke –TBP-20
- Civil Rights Training Sessions – David Schneider – TCR-1
- Metropolitan and Statewide Planning Circular Revisions - Victor Austin TPE-12
- OTRAK Data Input Findings Resolution – Vince Valdes –TPM-40
- Respective roles of 5307 Designated Recipient and MPO in programming 5307 apportionment – Goodman/Churchman
- Transit Bus Safety and Security Voluntary Program – Carole Ferguson TPM-30
- Application Server Switchover and upcoming moves – Jacquelynn Lopez TAD-20
- Bus Discretionary Program - Henrika Buchanan-Smith TPM-10
- Year End Closing Deadlines – Mary Martha Churchman TPM-10
- Regional Comments, Questions

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**6/4/07**

- Follow-up on Workload forecast for DOL – Johnson/Nutakor
- Discretionary Bus Program – Henrika Buchanan-Smith
- JARC Evaluation - Christopher Berendes
- Region Comments

**May 2007**

**5/21/07**

JARC Background Notes

Other Notes for Call

- JARC Evaluation Questionnaire – Pamela Brown, TPM
- Review of Discretionary Bus applications – Henrika Buchanan-Smith
- Update status of lapsing earmarks – Maria Wright/Kim Sledge
- Workload forecast for DOL – Johnson/Nutakor
- State Programs Meeting – Henrika Buchanan-Smith
- Update Status of Schedule/Procurement Strategy to support next Five Year Triennial Review Contract Award – TPM 40
- Updated Status for Schedule/Procurement Strategy to support next Five Year PMO Consultant Contract Award – Steve Asatoorian – TPM-20
- Regional Comments, Questions

**April 2007**

**4/23/07**

- Title VI – David Schneider (TCR-1)
- TEAM – Flex Funding – Jacquie Lopez, TAD
- Notice of Funding Availability on Bus and Bus Facilities – Mary Martha Churchman, Henrika Buchanan-Smith, TPM-10
- Update on Baldrige Application – Kate Mattice, TBP-12
- Useful Life of Buses and Vans – Draft Report – Henry Nejako, TRI-20
- Oversight Council Briefing – Khuong Luu, TPM-41
- Reminder – Annual Oversight Meeting – Khuong Luu, TPM-41
- Development of Program Guidance Data Base – Nydia Picayo, TPM-42
- Regional Comments, Questions

**4/09/07**

- Need for Printed Copies of Recently issued Circulars, Nydia Picayo (TPM-42)
- Improper Payment Information Act of 2002 – Implementation Plan - Kristine Leiphart, (TBP)
- Update on Federal Funding Accountability and Transparency Act of 2006 (FFATA) – Gwen Daniel, (TBP); Jacquie Lopez, (TAD)
- Tribal Transit Update – Henrika Buchanan-Smith, (TPM-10)

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- Q&A's on Bus and Bus Facilities Discretionary Grant Proposals – Henrika Buchanan-Smith, (TPM-10)
- Regional Comments/Questions

## March 2007

3/26/07

- Changes and Updates in Oversight Program – Vince Valdes, TPM-40; Khuong Luu, TPM-41
- JARC/New Freedom Grant Requirements – Henrika Buchanan-Smith, TPM-10
- Discretionary Bus Notice of Funding Availability – Henrika Buchanan-Smith - TPM-10
- Baldrige Organizational Profile – Fred Williams, TBP
- Clarification on Requirement for a Grantee's DUNS Number – Walt Mokey, TPM-10
- Regional Comments, Questions

3/12/07

- Strengthening FTA's oversight role on non-New Start capital projects – Jeffrey Davis (TRO-9)
- Status of Oversight Reviews requested in the 2006 Grantee Oversight Assessment – Jeffrey Davis (TRO-9), David Schneider-TCR, Security Reviews – Mike Taborn, TPM-30
- Update on the status of flex fund transfers – Kris Clarke, TBP-20
- Wireless Fidelity in Transit – Mike Baltes, TRI-10
- Update on the 5310, JARC and New Freedom Circulars – Matthew Lesh, TPM-42
- Update on the Clean Fuel Formula Grant Rule – Kim Sledge, TPM-10
- Update on the 2007 Apportionments Notice – Matthew Lesh, TPM-42
- Update on the Notice of Funds Availability for the Bus and Bus Facilities and Alternative Analysis Programs – Matthew Lesh, TPM-42
- Planning Circulars – Victor Austin, TPE

## February 2007

2/26/07

- FY 2007 Appropriations – Kris Clarke, TBP
- Updates re: FHWA Initiation of FY 2007 Flex Fund Transfers – Kris Clarke, TBP
- FY 2007 Apportionments – Mary Martha Churchman, TPM-10
- Discretionary Bus Category in FY 2007 – Mary Martha Churchman, TPM-10
- New Freedom Formula Adjustment – Mary Martha Churchman, TPM-10
- FTA C 9040.1F (Section 5311 program) – Nydia Picayo, TPM-42
- JARC/New Freedom/Section 5310 Circulars – Nydia Picayo, TPM-42
- Updates re: Proposed or Planned FY 2007 Oversight, Engineers, Planners & Grant Delivery Conferences – Vince Valdes, TPM-40

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**2/12/07**

- Staff Additions – Ronald Hynes, TRI
- Introducing Assistive Technology for Individuals with Disabilities – Walt Mokey, TPM-10
- Update on Circular Progress – Matthew Lesh, TPM-42
- Final Rule on Joint Development – Jayme Blakesley, TCC-10
- Final Rule on Metropolitan and Statewide Planning – Charlie Goodman, TPE-10
- Information Sessions – Maryanne Polkiewicz, TPM-42

**January 2007**

**1/16/07**

- Buy America – Richard Wong, TCC
- FTA “Information Sessions” – Cheryl Hershey, TPM-42
- Timeline for FTA C 9040.1F (Section 5311 Circular) – TPM-42
- Refresher on Annual Grantee Reports – Pat Simpich, TPM-42
- Clarification on Submittal of Certifications and Assurances – TPM-42
- Earlier Project Management Oversight (PMO) Participation in Projects – Michael O’Connor, TPM-20
- Progress on Contract Re-examining FTA Oversight Program – Tretha Chromey, TPM-41
- Planning re: Future Conferences Involving Headquarters and Regional Office Staff – Khuong Luu, Vince Valdes, TPM-40

**December 2006**

**12/18/06**

- Continuing Resolution – Rich Steinmann, TOA
- Earmarks under a Full-Year Continuing Resolution – TPM, TBP, TOA and TCC representatives
- Updating Milestones and Grant Closeouts – Mary Martha Churchman, TPM-10
- Buy America Second Notice of Proposed Rulemaking (SNPRM) – Richard Wong, TCC and John Bell, TPM-20
- FTA/US Coast Guard concurrent Drug & Alcohol Testing, Final Rule – Jerry Powers, TPM-30
- Status of Joint Development Guidance – Jayme Blakesley, TCC
- Progress Report on HOT Lanes Guidance – Jayme Blakesley, TCC
- Regional Comments/Questions

**12/04/06**

- Continuing Resolution Relief – Kris Clarke, TBP-20
- Debt Service Reserve – Federal Register Notice – Paul Marx, TBP-10
- Progress on Alternative Transportation in Parks and Public Lands Program – Scott Faulk, TPM-10

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- Follow-up on Using Carryover Funds to Expedite Triennial Reviews – Khuong Luu, TPM-41
- Follow-up on Use of CMAQ Funds – Abbe Marner, TPE-30
- Scope and Activity Codes for JARC and New Freedom – Henrika Buchanan-Smith, TPM-10
- Plans for Producing Circulars in 2007 – Matthew Lesh, TPM-42
- Regional Comments/Questions

## November 2006

### 11/20/06

- Rollout of Planning Database on TMA Certifications – Candy Noonan, TPE-10
- Managerial Cost Accounting – Peter Chipman, TBP-20
- Continuing Resolution to December 8... what we can or cannot do - TBP
- Document Management on the O:/ drive – Nydia Picayo, TPM-42
- Why does it take so long to get guidance/answers from the Guidance Team? – Jerry Hubbard, TRO-4
- Update on the Cooperative Procurement Pilot Project (CPPP) – Bruce Robinson, TRI
- Status of 2007 Triennial Review Contractors – Larry Penner, TRO-2
- Regional Comments, Questions

### 11/6/06

- Research Program Coordination – Bruce Robinson, TRI-1
- New CMAQ Guidance dated October 31, 2006 – Abbe Marner, TPE-30
- In-Kind Match (2 year pilot for 5311(f)) – Mary Martha Churchman, TPM-10
- Guidance for ATPPL grants – Mary Martha Churchman, TPM-10
- Tribal Transit Applications – Lorna Wilson, TPM-10
- New Federal Register Notice Clarification for JARC/NF/5310 – Mary Martha Churchman/Henrika-Buchanan-Smith, TPM-10
- Status of 2007 Certifications and Assurances – Nydia Picayo, TPM-42

## October 2006

### 10/23/06

- Status of Tribal Transit Applications – Henrika Buchanan-Smith, TPM-10
- Safety and Security Update – Michael Taborn, TPM-30
- Implications of 2007 Engine Emission Regulations/Requirements – John Bell, TPM-20
- Grants.gov – Sarah Graham, TRO-6; Jacquie Lopez, TAD
- MCA – Labor Distribution Reporting – Peter Chipman
- Grants Policy Committee (PL 106-107)
- Regional Comments/Questions

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**10/10/06**

- Fiscal Year 2007 Funds – Kris Clarke, TBP-20
- Administrative Budget Procedures – Kris Clarke, TBP-20
- Useful Life of Detroit Diesel Engines, 40 Series – John Bell, TPM-20
- Discussion re: Need for FY 07 Grants Management Conference – Vince Valdes, TPM-40
- DOL – Arthur Lopez, TCC
- Regional Comments/Questions

**September 2006**

**9/25/06**

- Open Mic re: End-of-year Concerns, Questions, Comments from Regions – Mary Martha Churchman, Chris Nutakor, Jacquie Lopez, Kris Clarke, Gwen Daniel, Nancy Grubb, and Arthur Lopez with commentary.
- Continuing Resolution FY 2007 – Kris Clarke, TPB-20
- JARC, New Freedom, 5310 Information Roll-Out – Mary Martha Churchman, TPM-10
- “FTA-Z” Guidance Tool – Nydia Picayo, TPM-42

**9/11/06**

- New Staff Members – TPM-10, TPM-42, Others
- Rebuilding Lower Manhattan – Bernard Cohen, LMRO
- Counting Fixed Guideway Miles: Policy Statement on HOT Lanes – David Horner, TCC-1
- End-of-year Activities – Henrika Buchanan-Smith, TPM-10
- Ramping up Implementation of JARC, New Freedom, and Section 5310 Programs – Cheryl Hershey, TPM-42
- Labor Distribution Report, New Version – Pete Chipman & Kris Clarke, TBP-20

**August 2006**

**8/14/06**

- PMOC Task Order Status – Aaron James, TPM-20
- IT Audit Issues Related to TEAM and ECHO – Gwen Daniel, TBP-40
- Year-end and TEAM – Gwen Daniel, TBP -40
- Year-end Grant processing activities – Henrika Buchanan-Smith, TPM-10
- Lapsing Grants – Henrika Buchanan-Smith, TPM-10
- Oversight Council Update – Deborah Bilek, TPM-41
- Annual Oversight Assessment Update – Deborah Bilek, TPM-41
- Guidance – Nydia Picayo, TPM-42

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## July 2006

### 7/31/06

- “The Move” – David Hostetter, TAD – 20
- Launch Plans for FTA’s Redesigned Public Website – Dave Longo, TCA
- Flexible Fund Transfers – Kris Clarke, TBP- 20
- Lapsed Funds and Other End-of-year Notes - Kris Clarke, TBP-20
- Cooperative Procurement Pilot Program – Bruce Robinson, TRI
- Status of New PMO Contracts – John Bardwell, TAD-40.
- Notice of Funds Availability: Solicitation for FY 2006 Tribal Transit Program Funds – Lorna Wilson, TPM-10
- FTA Circular 9040.1F, “Nonurbanized Area Formula Program Guidance...” – Lorna Wilson, TPM-10
- Launching the Oversight Council – Deborah Bilek, TPM-40

### 7/17/06

- New Staff Assignments – HQs
- Alternative Transportation in the Parks and Public Lands Program – Kate Mattice, TBP-12
- Transfer of CMAQ Funds – Kris Clarke, TBP-20
- Update on Procurement Contracts – Jim Muir, TPM-41

## June 2006

### 6/19/06

- Grantee Oversight Tracking – Deb Kerson, TPM-41
- Plans for Airing NPRM on Planning Regulations (Federal Register of June 9) – Effie Stallsmith, TPE
- DOT Limited English Proficiency (LEP) Guidance – David Schneider, TCR
- End-of-Year Preparations – Mary Martha Churchman, TPM-10
- FY 2006 Grants – New Freedom/JARC/5310 – Henrika Buchanan-Smith
- Notes on Dulles Project – Brian Glenn, TRO-3
- Guidance – Nydia Picayo, TPM-42

### 6/5/06

- Status of Planning NPRM and Outreach – Charlie Goodman,
- TPE Incorporating Transit in the Strategic Highway Safety Plan – Kimberly Goins, TPE
- Processing of High Priority Transfers – Kris Clarke, TBP-20
- TEAM Training – Jacquie Lopez, TAD-20
- OTrak Version 8 – Jacquie Lopez, TAD-20
- TEAM User Re-Certification – Walt Mokey, TPM-10
- Alternative Transportation in the Parks and Public Lands Program (ATPPL) – Tina Hodges, TBP- 12



# **Biweekly Conference Calls – Headquarters and Regional Offices**

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- NTI Real Estate Course – Mamie Smith-Fisher, TPM-20
- Engineers Conference – Aaron James, TPM-20
- TPM Job Announcements – TPM-10
- Discussion of Guidance of the Week – Nydia Picayo, TPM-42
- Oversight Council – Vince Valdes, TPM-40
- Regional Comments/Questions

## **May 2006**

### **5/8/06**

- FY 2008 – Kevin Smith - TBP
- Managerial Cost Accounting Update
- TEAM Recertification Process and Deadline for Non-FTA Users – Jacquie Lopez (TAD)
- Questions on the May 8, 2006 Telecon
- Status on Clarification of Questionable New 5309 Earmarks – Kate Webb
- Problems Resolving FY06 Bus Grants – Mary Martha Churchman – TPM and Kate Webb - TAD
- Grantee Oversight Assessment – Deborah Kerson - TPM
- Guidance of the Week: Transfer from 5311 to a 5307 Small Urbanized Area – Nydia Picayo - TPM

### **5/22/06**

- Transfer of High Priority Earmarks – Moni Nejati – TBP-20
- New Earmark Clarification Letter – Mary Martha Churchman – TPM – 10
- TEAM Grantee Re-Certification – Mary Martha Churchman – TPM -10
- Grantee Oversight Assessment – Deborah Kerson – TPM – 42
- Guidance – Nydia Picayo – TPM -42

## **April 2006**

### **4/11/06**

- Over the Road Bus Proposals and Review Process – Blenda Younger – TPM -10
- OTRB Program Proposal Submissions through grants.gov – Jacquie Lopez – TPM -10
- Use of Non-Scope Codes in TEAM and Grant Projects – Walt Mokey – TPM – 10
- Managerial Cost Accounting – Update - Peter Chipman – TPM – 20
- Update on 1% Security – Rick Gerhart - TPM – 30
- United We Ride – Update – Doug Bernie – TPM
- TEAM Recertification – Jacquie Lopez TPM -10
- Illustrative Examples of SAFETEA-LU Planning in Current Practice – Darin Allan (TPE-12)
- Guidance – Nydia Picayo (TPM-42)
- Regional Comments, Questions

# Biweekly Conference Calls – Headquarters and Regional Offices

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## March 2006

### 3/13/06

- Updated Grant Processing Reports – Jacquie Lopez – TPM -10
- TEAM User Recertification – Jacquie Lopez (TPM-10)
- DOT Pandemic Draft Implementation Plan – Ken Lord (TPM-30)
- Federal Register Notice on Crosscutting Issues and the Competitive Selection Process and the Human Service Coordination Planning Process – Henrika Buchanan-Smith (TPM-10)
- Tribal Transit Update – Jamie Durham (TPM-10)
- Other Guidance Issues – Pat Simpich (TPM-40)

### 3/27/06

- TEAM User Recertification – Gwen Daniel (TBP)
- SAFETEA-LU Strategy Meeting – Bryna Helfer (TPM-1)
- Two New Working Groups (Rules and Guidance) – Aaron James (TPM-20)
- NTI Course Solicitation/Review – Pam Brown (TRI)
- Tribal Transit-Federal Register Notice – Jamie Durham (TPM-10)
- 2006 Financial Management Oversight Reviews – Nydia Picayo (TPM-40)
- Recent SAFETEA-LU related Publications – Cheryl Hershey (TPM-40)
- Guidance – Nydia Picayo (TPM-40)
- Regional Comments/Questions

## February 2006

### 2/13/06

- New Starts Report – Sean Libberton - TPM – 22
- Update on Tribal Transit Program – Outreach Meetings – Jamie Durham, TPM-10
- Talking Points – Mary Martha Churchman, TPM-10
- Designated Recipients – Job Access/Reverse Commute Program (JARC) and New Freedom – Mary Martha Churchman, TPM-10
- Transit Enhancements – Frequently Asked Questions (FAQ) – Ken Johnson, TPM-10
- Useful Life Study of Buses – Henry Nejako, TRI-20
- Real Estate Update – Ron Fannin, TPM-20
- Managerial Cost Accounting (MCA) – Peter Chipman, TBP-20
- Clarifications – 1% Security – Pat Simpich, TPM-42
- Address for Patricia Levine – Pat Simpich, TPM-42

### 2/27/06

- Program Guidance – Use of Request Form -Tokey Boswell (TPM-42)
- Annual Oversight Meeting – Deborah Kerson, (TPM-40)
- TEAM User Group Meetings – Jacquie Lopez (TPM-10)

# Biweekly Conference Calls – Headquarters and Regional Offices

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- Earmark Administration Module – Jacquie Lopez, (TPM-10)
- ERRATA for Table 11 – FY 2006 Bus Earmarks - Mary Martha Churchman (TPM-10)
- FY 07 Budget, Senate Banking Committee Hearing - Rich Steinmann (TOA)
- SAFETEA-LU Implementation Update (Kate Mattice, TBP)
- Alternative Transportation in Parks and Public Lands (Kate Mattice, TBP)

## January 2006

### 1/3/06

- United We Ride (UWR) Strategies, 2006 – Bryna Helfer
- FY 2006 Apportionments (rescission/unallocated discretionary balances/breakouts of 5340 and UZA amounts for JARC and new Freedom) – Mary Martha Churchman, TPM-10 and Nydia Picayo
- Guidance of the Week: Transit Enhancements – Nydia Picayo

### 1/17/06

- Introduction of Cheryl Hershey – Pat Simpich/Cheryl Hershey, TPM 42
- TEAM Loading – Kris Clarke, TPM-20
- Managing Earmarks in TEAM, New Procedures – Jacquie Lopez, TPM-10
- 1% Security Spending Declaration for 5307 Applicants in TEAM, New Procedures – Jacquie Lopez, TPM-10; Pat Simpich, TPM-42
- OTrak Version 7.0 Release – Jacquie Lopez, TPM-10
- Regional Field Office Pilot
- Managerial Cost Accounting – Peter Chipman, TBP-20
- FMO Seminars – Jayme Blakesley, TPM-41:
- Internal Guidance Document – Ryan Hammon, TPM-10
- Guidance System – Nydia Picayo, TPM-42
- Guidance of the Week – Trolleys – Tokey Boswell, TPM-42

### 1/30/06

- Introductions of New FTA Staff Attending Biweekly Call – Pat Simpich, TPM 42; Don Gismondi, TRO-5; and Cheryle Tyson, TRO-6
- 2006 Apportionments – Kris Clarke, TBP-20
- Federal Register Notice – Apportionments – Mary Martha Churchman, TPM-10:
- SAFETEA-LU Implementation – Kate Mattice, TBP-12
- Joint Development “Annex” – Paul Marx, TBP-12
- Overview of “Transit Oriented Development” (new brochure) – Paul Marx, TBP-12:
- Annual Oversight Conference – Update – Vince Valdes and Deborah Kerson, TPM-41
- Managerial Cost Accounting – Peter Chipman, TBP-20
- Guidance Topics for the Oversight Conference – Tokey Boswell, TPM-42
- Technical Evaluation Committee for FMO (Financial Management Oversight) Procurement – Nydia Picayo, TPM-42

## LIST OF INFORMATION SESSIONS

<b>Date</b>	<b>Topic</b>	<b>Lead Speaker</b>
1/18/07	Common Rule - Subparts A & B	Nydia Picayo
1/31/07	Capital Cost of Contracting	Pat Simpich
2/8/07	Deferred Local Share	Pat Simpich
2/14/07	Transit Programs - An Overview	Mary Martha Churchman
3/1/07	Toll Revenue	Pat Simpich w/ Nydia Picayo
3/8/07	Overview of Transit Programs	Mary Martha Churchman
3/22/07	Equipment	Pat Simpich w/ Nydia Picayo
3/29/07	Program Income	Pat Simpich w/ Nydia Picayo
4/12/07	Repeat of "Overview of Transit Programs"	Mary Martha Churchman
5/24/07	The Altoona Bus Research and Testing Center	Marcel Belanger – TRI
6/7/07	Q&A about "Urbanized Area Formula Grants" (also known as Section 5307)	Scott Faulk and Ken Johnson
7/12/07	Non-Urbanized Program	Lorna Wilson
7/26/07	Real Estate	Ron Fannin
9/27/07	Alternative Transportation in Parks and Public Lands	Tina Hodges and Scott Faulk
10/25/07	Buses and the Booz Allen Hamilton "Useful Life of Buses and Vans" Report of April 2007	Henry Nejako and John Bell
11/8/07	New Starts Commitment	Cheryl Oliver
1/24/08	National Transit Database: What is it and why do we collect data.	Gary DeLorme (TBP)
1/31/08	Charter Bus	Linda Lasley
2/14/08	Charter Bus (Cont'd)	Linda Lasley
2/28/08	Tribal Programs	Lorna Wilson (TPM)
3/27/08	Useful Life of Rolling Stock and Calculating Remaining Federal Interest	Nydia Picayo and John Bell
4/10/08	Coordinated Plans	David Schneider - TPM
4/24/08	Common Rule: Standards for Financial Management Systems, Payment, and Allowable Costs	Nydia Picayo - TPM
5/8/08	Milestone Progress and Financial Status Reports	Nydia Picayo - TPM
5/22/08	Zero Dollar Grant Amendment	Rita Maristch and Nydia Picayo
6/26/08	NTD Data Users Seminar	John Giorgis
8/28/08	School Bus Regulation/Policy Statement and Charter Bus update	Linda Lasley and Michael Culotta

**Matthews, LaStar <FTA>**

**From:** Lasley, Linda <FTA>  
**Sent:** Monday, September 15, 2008 3:52 PM  
**To:** Matthews, LaStar <FTA>  
**Subject:** FOIA request  
**Attachments:** Change Manager Orientation Agenda.doc; FINAL Town Hall Agenda Feb 6.doc; FTA All-Employee agenda 1-28-08.doc

Here is the information for the Change Manager Program. All training sessions were provided by USDA. Agendas are also attached for Orientation, All-Employee Rally, and Town Hall discussion. No agendas for the focus group discussion.

Orientation	10/17/07
Training (Leadership)	10/29/07 – 11/2/07
Training (Strategic Planning)	12/5/07 -- 12/7/07
All-Employee Rally	1/28/08
Town Hall Discussion	2/6/08
Focus Group Discussion (Strategic Planning Opportunities and Threats)	2/27/08
Focus Group Discussion (Strategic Planning Strengths and Weaknesses)	3/12/08
Training (Team Building)	3/17/08 – 3/19/08
Training (Performance Measurement)	7/16/08 – 7/18/08

9/18/2008

**Change Manager: Facilitating Quality Improvement Orientation**

**October 17, 2007**

**3:30 p.m. to 4:30 pm.**

***West Building Conference Center-Room 6***

**Call in number: (866) 711-4381 PASSCODE: 2509310**

**Agenda**

**1. Introductions- Change Managers**

**2. Introductions- Facilitators**

**3. Workgroups:**

***Taking Things Off Plate***

**Goal: streamline internal business processes**

**Milestone: provide input to reauthorization team regarding specific streamlining initiatives; develop implementation plan for others**

***Human Capital***

**Goal: Develop leadership metrics for all offices**

**Milestone: Provide metric in time for '09 Appraisals (September 30, 2008)**

***Strategic Planning***

**Goal: Assist in development of agency strategic plan; provide input to reauthorization, if necessary**

**Milestone: Strategic plan due September 30, 2008**

**3. Training**

**a. Leadership- Oct. 29<sup>th</sup> through Nov. 2<sup>nd</sup> (see handouts)**

**b. Strategic Planning- Dec. 3-5<sup>th</sup> (course description soon)**

**c. USDA certificate**

**4. Workgroup meetings – mandatory**

**a. Confidentiality**

**b. Timeframes/milestones**

**c. Reporting**

**5. Mentors**

**Strategic Planning**

**Bob Tuccillo**

**Rick Krochalis**

**Human Capital**

**Ann Linnertz**

**Taking Things Off Our Plate**

**Susan Borinsky**

**Dick Doyle**

**6. Workgroup meeting**

- a. **Set date and time for workgroup meetings (*please bring calendars*)**

**7. Closing remarks/comments**

**AGENDA**  
**Change Management Town Hall**

February 6, 2008

2:30 p.m. – 3:45 p.m.

Oklahoma Room

Regions – 1-888-942-8133 Pass Code 14774

*A discussion about where we are going and how we will get there*

2:30 pm Welcome – Deputy Administrator Sherry Little

2:33 pm Purpose & Overview – Tina Hodges

2:36 pm Change Management Initiatives

**Strategic Planning**

Susan Herre, Pete Chipman

Other Members: Aaron James, Sharon Pugh, John Witmer, Chris Nutakor, Noah Berger, Bruce Robinson, Nancy-Ellen Zusman, David Knight, Ed DeLong, Daniel Creighton

Facilitators: Yvonne Griffin & Joanne Waszczak

**Human Capital**

Wanda Diggs

Other Members: Paul LeBrun, Shelia Byrne, Laura Wallace, Jessica Granell, Vince Valdes, Arlene DiRienzo, Darin Allen, Paul Griffo, William Wheeler, Sylvia Marion, Jeffrey Davis

Facilitators: Marlon Harris & David Schneider

**Taking Things Off Our Plate**

Victor Austin, Betty Jackson, Pam Brown

Other Members: Gail McFadden-Roberts, Lucinda Eagle, Carlos Garay, Mark Bechtel, Kate Mattice, Cheryl Hershey, David Beckhouse, Elizabeth Martineau

Facilitators: Tina Hodges & Henrika Buchanan-Smith

3:06 pm Change Management Webpage – Pam Brown

3:09 pm Q/A & Brainstorming – Henrika Buchanan-Smith

**Change Management Workgroups**

3:39 pm What's next? – Henrika Buchanan-Smith



**FTA All-Employee Rally**  
**January 28, 2008**  
**Navy Yard Conference Center**  
**1:00 (regions call in) 1:30-3:00 (rally) 3:00-4:15 (Change Managers)**

1:00 to 1:30	Test of conference lines—Regions call in
1:30 to 1:40	Welcome remarks from Administrator Simpson
1:40 to 1:50	Reauthorization update (R. Tuccillo & K. Mattice)
1:50 to 2:00	Knowledge Management (A. Linnertz & S. Wallace)
2:00 to 2:10	Employee recognition awards (R. Krochalis & D. Doyle)
2:10 to 2:25	Change Managers: Facilitating Quality Improvement update (Change Managers)
2:25 to 2:30	Intro of Baldrige Award Winner: ARDEC (A. Linnertz/S. Wallace)
2:30 to 2:50	ARDEC (D. Denery)
2:50 to 3:00	Closing Remarks from Deputy Administrator Little
3:00 to 4:15	Change Managers opportunity to talk to D. Denery