



TRANSIT FINANCE LEARNING EXCHANGE SPRING 2018 WORKSHOP

EFFICIENCY AND EFFECTIVENESS OF SERVICE

March 11 – 13, 2018

Hosted by



Phoenix, Arizona

Register Today at www.tflex.org





Developing Finance Professionals in Transit

TFLEX SPRING 2018 WORKSHOP
EFFICIENCY AND EFFECTIVENESS OF SERVICE
March 11 – 13, 2018 / Phoenix, Arizona

About TFLEX

The Transit Finance Learning Exchange (TFLEX) began with the inaugural workshop in March 1999. This conference shaped the ideas of a few leading finance professionals into an active nationwide working group of transit finance professionals.

TFLEX enables transit agencies to share and exchange training materials, instructors, uniform procurement scopes of work, policies and procedures and best business practices.

Mission Statement

TFLEX exists as a strategic alliance of transit agencies formed to leverage mutual strengths and continuously improve transit finance leadership, development, and information sharing. The purpose of TFLEX is to evolve the

finance function into a value-added business partner within each transit authority.

CPE Credits



A total of 13 CPE credits will be available. Transit–Finance Learning Exchange (T-FLEX) is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.learningmarket.org

Dress Code

A casual dress code is encouraged at all events.

Host Hotel



Kimpton Hotel Palomar
2 East Jefferson St.
Phoenix, AZ 85004
877-488-1908



TFLEX SPRING 2018 WORKSHOP
EFFICIENCY AND EFFECTIVENESS OF SERVICE
March 11 – 13, 2018 / Phoenix, Arizona

DAILY WORKSHOP AGENDA

Day One • Sunday, March 11, 2018

5:00 – 6:00 Business Meeting - At Valley Metro Headquarters, 101 N. 1st Avenue

Day Two • Monday, March 12, 2018

Sessions held at the Valley Metro Headquarters, 101 N. 1st Avenue

8:00 – 8:30 Registration and Continental Breakfast

8:30 – 9:00 Welcome and Review of Meeting Objectives

Joe Costello – Senior Vice President, Finance, Dallas Area Rapid Transit and Chair of TFLEX
Scott Smith – CEO Valley Metro

9:00 – 10:00 Where Have All the Riders Gone? Update on ridership issues

Updates from members on ridership trends at their agencies.

10:00 – 10:15 Break

10:15 – 12:00 Efficiency and Effectiveness of Service

Setting service standards, how do you measure efficiency versus effectiveness? How do you get through the ugliness of deciding what service to decrease or cut? You do the model and then what do you do?

Joe Gregory, Service Planning Manager for Valley Metro will discuss the model that took them three years to develop. Sean Murdock will discuss the dilemma at OCTA during the great recession and their performance. Houston will discuss their service standards model and DART will discuss theirs as well.

12:00 – 1:00 Lunch – Speaker: Hodge, Director, PFM Financial Advisers

1:00 – 2:00 Federal update

Discussion of 1) how the new tax law may affect transit – will it reduce the benefit of our bonds, 2) FTA's Transit Asset Management program. Denver can talk about their program as well.

2:00 – 3:00 Tax Revenue Projections

How do member agencies prepare tax forecasts? What works best? Joshua Worley, economist with the Arizona DOT will be on hand with Valley Metro to lead the discussion as they explain how the two entities work together in projecting tax revenues. Also: Issues with internet sales tax and distribution centers and how much tax is realized from them.

3:00 – 3:15 Break

3:15 - 5:00 Needs & Leads

Always one of the most popular TFLEX sessions, Needs & Leads is a facilitated discussion of learning & development needs and good business practices shared by each attending agency.

6:45 – ? Monday Night Dinner –



TFLEX SPRING 2018 WORKSHOP
EFFICIENCY AND EFFECTIVENESS OF SERVICE
March 11 – 13, 2018 / Phoenix, Arizona

Day Three • Tuesday March 13, 2018

Sessions held at the Valley Metro Headquarters, 101 N. 1st Avenue

- 8:45 – 9:00** **Welcome and Review of Meeting Objectives**
Joe Costello – Senior Vice President, Finance DART
- 9:00 – 10:00** **Transit 101**
Transit 101 – Review of Module 8 – Paratransit Operations
- 10:00 – 10:15** **Break**
- 10:15 – 11:15** **Changing Employee Culture**
Valley Metro takes center stage in discussing their efforts to change employee culture; Joe Costello, Sr. VP of Finance, DART will talk about their Five Star program, and Michelle Caldwell – CFO at Foothill Transit discusses what it was like to come into an agency that had already done the work to create and maintain a good culture.
- 11:15– 12:00** **Where Have All the Riders Gone? – Valley Metro tries to find out.**
Omar Peters – Planner II with Valley Metro will discuss a recently completed ASU Student Survey. Related to “where have the riders gone” they noticed a significant decline in college student ridership between ASU’s Phoenix and Tempe campuses and surveyed students to learn more.
- 12:00 – 1:30** **Lunch**
- 1:30 – 2:00** **Wrap-up Day Two and Overall Workshop Evaluation – Irene DeMers**