

Preparing for a Travel Reduction Program (TRP) Audit

Transportation Coordinator (TC) Webinar

October 21, 2020



Today's Presenters



Suzanne Day
Commute Solutions
Program Coordinator






Lillian Duarte
Commute Solutions
Program Supervisor



Greg Moeller
Auditor
Maricopa County TRP

Tech Tips

- Your microphone is muted. You can ask questions and give input using the controls on your screen.
- Click on Handout to open the PDF and follow links or print to take notes.
- The  symbol indicates an audience poll.  means we'll ask for a show of hands.  Means we'll watch a video.
- Webinar will be recorded, and a link emailed.

Today's Session

- Preparing for a TRP Audit
- Updates for TCs
- Future webinars



Step 1: Audit Scheduling



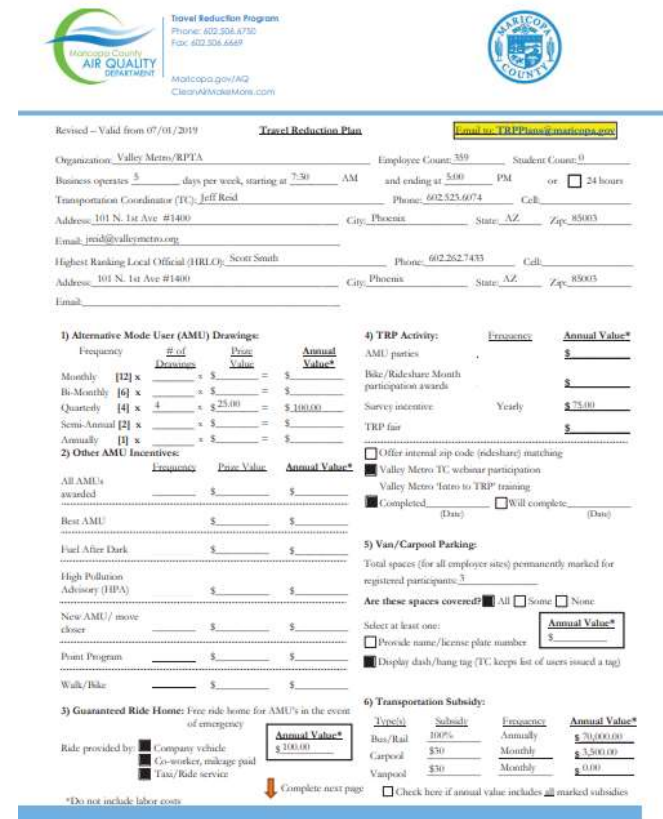
- Maricopa County typically audits each TRP employer's records annually.
- Audits are generally conducted by phone.
- TCs will be notified by email prior to the scheduled audit.

The annual audit ensures employers are implementing and tracking their TRP incentives.

Step 2: Your TRP Plan

Refer to your organization's most recent TRP plan.

- The plan lists the incentives you offer to encourage people not to drive alone to work.
- The plan will guide the documentation needed.
- Don't have a copy? Email TRP@Maricopa.Gov.



Revised - Valid from 07/01/2019 **Travel Reduction Plan** [Email to: TRPPlan@maricopa.gov](mailto:TRPPlan@maricopa.gov)

Organization: Valley Metro/RPTA Employee Count: 359 Student Count: 0
 Business operates 5 days per week, starting at 7:30 AM and ending at 5:00 PM or 24 hours
 Transportation Coordinator (TC): Jeff Reid Phone: 602.525.6074 Cell: _____
 Address: 101 N. 1st Ave #1400 City: Phoenix State: AZ Zip: 85003
 Email: jreid@valleymetro.org
 Highest Ranking Local Official (HRLCO): Scott Smith Phone: 602.262.7433 Cell: _____
 Address: 101 N. 1st Ave #1400 City: Phoenix State: AZ Zip: 85003
 Email: _____

1) Alternative Mode User (AMU) Drawings:

Frequency	# of Drawings	Price Value	Annual Value*
Monthly [12] x		\$ _____	\$ _____
Bi-Monthly [6] x		\$ _____	\$ _____
Quarterly [4] x	4	\$ 25.00	\$ 100.00
Semi-Annual [2] x		\$ _____	\$ _____
Annually [1] x		\$ _____	\$ _____

2) Other AMU Incentives:

Frequency	Price Value	Annual Value*
All AMU's awarded	\$ _____	\$ _____
Best AMU	\$ _____	\$ _____
Fuel After Dark	\$ _____	\$ _____
High Pollution Advisory (HPA)	\$ _____	\$ _____
New AMU/ move closer	\$ _____	\$ _____
Park Program	\$ _____	\$ _____
Walk/Bike	\$ _____	\$ _____

3) Guaranteed Ride Home: Free ride home for AMU's in the event of emergency

Ride provided by	Annual Value*
<input type="checkbox"/> Company vehicle	\$ 100.00
<input type="checkbox"/> Co-worker, mileage paid	
<input type="checkbox"/> Taxi/Ride service	

4) TRP Activity:

Frequency	Annual Value*
AMU parties	\$ _____
Bike/Rideshare Month participation awards	\$ _____
Survey incentive Yearly	\$ 25.00
TRP fair	\$ _____

Offer internal zip code (rideshare) matching
 Valley Metro TC webinar participation
 Valley Metro 'Intro to TRP' training
 Completed (Date) _____ Will complete (Date) _____

5) Van/Carpool Parking:

Total spaces (for all employer sites) permanently marked for registered participants: 3

Are these spaces covered? All Some None

Select at least one:
 Provide name/license plate number **Annual Value*** \$ _____
 Display dash/hang tag (TC keeps list of users issued a tag)

6) Transportation Subsidy:

Type(s)	Subsidy	Frequency	Annual Value*
Bus/Rail	100%	Annually	\$ 20,000.00
Carpool	\$50	Monthly	\$ 3,500.00
Vanpool	\$30	Monthly	\$ 0.00

*Do not include labor costs Complete next page Check here if annual value includes all marked subsidies

Step 3: Pre-Audit Checklist

MARICOPA COUNTY
Travel Reduction Program

PRE-AUDIT CHECKLIST

Organizations in the Travel Reduction Program (TRP) will be audited once each plan year to confirm compliance. Below is a summary of the items in the TRP Annual Plan. To prepare for a successful audit, please follow these steps:

If your TRP Annual Plan includes: Provide this:

1. Alternative Mode User (AMU) Drawings	<input type="checkbox"/> Copy of promotion(s) announcing drawing(s) <input type="checkbox"/> Receipts for prizes/incentives <input type="checkbox"/> Dated/signed acknowledgement from winner(s) confirming they have received their prize(s)/incentive(s)
2. Other AMU Incentives	
New AMU/Move Closer	<input type="checkbox"/> Copy of promotion <input type="checkbox"/> List of participants <input type="checkbox"/> Receipts for prizes/incentives <input type="checkbox"/> Acknowledgement from recipients confirming they received the prize and/or incentive
Best AMU	<input type="checkbox"/> Copy of promotion <input type="checkbox"/> List of participants <input type="checkbox"/> Receipts for prizes/incentives <input type="checkbox"/> Acknowledgement from participants confirming they received the prize and/or incentive
Point Program	<input type="checkbox"/> Copy of promotion and expense receipts/reports <input type="checkbox"/> List of participants <input type="checkbox"/> Document that shows points redeemed, signature and date of redemption
All AMUs Awarded	<input type="checkbox"/> Copy of promotion and expense receipts/reports <input type="checkbox"/> List of participants <input type="checkbox"/> Acknowledgement from participants confirming they received the prize and/or incentive
3. Guaranteed Ride Home	<input type="checkbox"/> Policy/instructions <input type="checkbox"/> Dated usage log <input type="checkbox"/> Receipts (i.e. taxi, petty cash vouchers, mileage claims)

- Obtain the TRP pre-audit checklist.
- The list includes the most common TRP incentives.
- Gives examples of the type of documents that may be requested.

Step 4: Compare & Gather

- Circle or highlight your incentives on the checklist.
- Gather your documentation.
- Pro tip! Be sure prize drawing documents include the date and name of the contest or prize.



Insert Logo Here |       

PRIZE DRAWING WINNER VERIFICATION

Date of Drawing: _____ Award Period: _____ Prize Awarded: _____

Winner's Name: _____

Department: _____ Alternative Mode Used: _____

Receipt attached Gift card serial number: _____

Signature of Winner: _____ Date: _____ TC Initials: _____

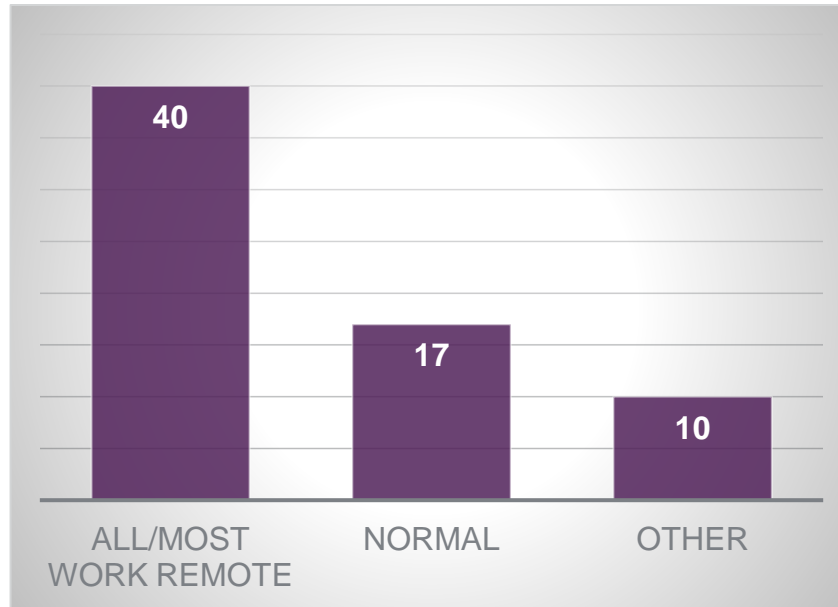
CARPOOL | VANPOOL | BUS | LIGHT RAIL | TELEWORK | BIKE | WALK

General Principles



- The TRP ordinance requires that incentives be communicated.
- County looks closely at incentives involving money.
- Put yourself in County’s “shoes” – prove you did what the plan promised.

Survey Says:



Responses to the webinar registration question “What's your workforce arrangement during the pandemic?”



Helpful Resources

- Commute Solutions
Documentation
Templates
 - Sample forms
 - Prize winner acknowledgments
 - Carpool hang tags
 - Lots more!
- Promotional tools
- Communication & Record Keeping



Need to attend Intro to TRP online training? [Find it here.](#)



Your input

Responses to the registration question “What’s your best tip for tracking your TRP efforts?”

- “ShareTheRide.” *Nancy J., City of Chandler*
- “Keep records in divided folders with tabs.” *Vicki C., El Mirage*
- “Keep a spreadsheet with all surveys & incentives laid out for the year (helps track those completed & plan ahead)” *April T., Eduprize Schools*
- “I use a TRP binder.” *Sonia J., Renaissance Phoenix Downtown*
- “Save all receipts, emails with the AMU users, purchase Orders.” *Shalini S., Maricopa Community Colleges*
- Persistence, patience and a good sense of humor.” *Robin-Yvette H., Arizona Training & Evaluation Center*

Post-Audit Follow Up



- If documentation is incomplete, Maricopa County will email a request for additional documents.
- TCs have 7 days to respond to the Request for Documentation.

Commute Solutions



Meet your **Commute Solutions Team**

How can we help you?

					
SUZANNE DAY Commute Solutions Coordinator sday@valleymetro.org 602.523.6063	LILLIAN DUARTE Commute Solutions Program Supervisor lduarte@valleymetro.org 602.523.6065	ANNETTE FETTIG Commute Solutions Coordinator afettig@valleymetro.org (602) 523-6077	TRISH LAKIN Commute Solutions Representative tlakin@valleymetro.org 602.523.6072	JEFF REID Commute Solutions Support jreid@valleymetro.org 602.523.6074	ANGIE WILKIE Vanpool Coordinator awilkie@valleymetro.org 602.523.6062

- Each TRP plan is unique.
- Valley Metro Commute Solutions staff is here to help.

News and Updates



Clean Air Campaign Awards



- Virtual event was held October 20
- Hundreds attended
- See the [list of winners](#)

Major Downtown Construction

- Redevelopment of Central Station and construction on the South-Central Extension/Downtown Hub light rail project will result in modifications for [28 bus routes](#) and closure of part of Central Avenue to vehicular traffic.
- Central Station will close during redevelopment.



[Watch a video](#) about the Central Station project (scroll down).

Quick Break Virtual Events



- Does your TRP include fairs, events, or parties?
- Let us help you promote your program!
- We can create a custom, under 10-minute virtual event for your audience.
- SWAG included!



Remember – There's no charge for our services!

Rideshare Month Rolls On

Rideshare Month is rocking, 2020 style!

- So far, 808 participants have tracked 11,383 “green” commutes in the Challenge.
- Represents over 191,000 miles and \$100,000 in savings.
- Track your October trips and enter to win by November 6!



Vanpool Promotion



- Now may be the perfect time to help a friend or co-worker start a new vanpool and receive some extra cash for doing so!
- Current Valley Metro vanpoolers who refer a new vanpool group will get a \$200 gift card, courtesy of our vanpool contractor Commute with Enterprise.
- To honor social distancing, there are currently no minimum ridership requirements.
- Contact Vanpool Coordinator Angie Wilkie, awilkie@valleymetro.org for more info.

Central Station Work Begun

- Construction on a new 1.6-mile extension of light rail, which will include the system's first elevated station, is underway.
- Crews have begun utility relocation, on the north side of Dunlap Avenue just west of the existing 19th Ave/ Dunlap station.
- See more at the [project page](#).



Tempe Transit Service



VIRTUAL PUBLIC MEETINGS

TRANSIT SERVICE CHANGES

Thursday, Sept. 24 at noon
Saturday, Sept. 26 at 11 a.m.
Online input: Sept. 24-Oct. 25

tempe.gov/TransitChanges

Tempe
is Making

- Due to the ongoing coronavirus pandemic, lower transit tax revenue and increasing cost of existing service, Tempe is exploring cost-saving transit service changes that will strive to minimize service impacts and still provide equitable transit service.
- Virtual public meetings held on September 24 and 26 were recorded and are [available here](#). Online input can be submitted through [October 25](#).



Summary

- Preparing for a TRP Audit
- TC Update
- Upcoming webinars
 - November 18, 10 a.m. – [Understanding Your TRP Survey Results](#)
 - December 16, 10 a.m. – [Valley Metro Projects Update](#)
 - January 27, 10 a.m. – [TC Toolkit: Everything You Need for TRP Success](#)
- Access [recorded webinars and slide shows](#)

Can't make it during a scheduled webinar? Register anyway; we'll email you the recording!