SCOPE OF SERVICES
BAY COUNTY 2040 LONG RANGE TRANSPORTATION PLAN UPDATE

I. BACKGROUND

The Florida Department of Transportation (DEPARTMENT), Bay County Transportation Planning Organization (TPO) and General Planning Consultant (CONSULTANT) mutually agree to furnish, each to the other, the respective services, information and items, as described herein and included in the CONSULTANT proposal for the Bay County 2040 Long Range Transportation Plan Update.

Scope of the Planning Process

The SAFETEA-LU Planning Factors are retained under MAP-21 as the Scope of the Planning Process. The eight Planning Factors remain unchanged and should be considered in the development of all TPO plans, projects, and programs, including the 2040 Long Range Transportation Plan. The following shall be considered in developing the 2040 LRTP Update:

A. Each Metropolitan Planning Organization shall provide citizens, affected public agencies, representatives of public transportation employees, freight shippers, providers of freight transportation services, private providers of transportation, representatives of users of public transportation, representatives of users of pedestrian walkways and bicycle transportation facilities, representatives of the disabled, and other interested parties with a reasonable opportunity to comment on the transportation plan.

B. The process for developing the plans and programs shall provide for consideration of all modes of transportation and shall be continuing, cooperative, and comprehensive to the degree appropriate, based on the complexity of the transportation problems to be addressed.

C. Consideration of the following eight (8) evaluation factors, as they relate to a twenty (20) year forecast period and shall be included in the Evaluation Criteria:

1. Support the economic vitality of the metropolitan area, especially by enabling global competitiveness, productivity, and efficiency,

2. Increase the safety of the transportation system for motorized and nonmotorized users,

3. Increase the security of the transportation system for motorized and nonmotorized users,

4. Increase the accessibility and mobility of people and for freight,
5. Protect and enhance the environment, promote energy conservation, improve quality of life, and promote consistency between transportation improvements and State and local planned growth and economic development patterns,

6. Enhance the integration and connectivity of the transportation system, across and between modes, for people and freight,

7. Promote efficient system management and operation, and

8. Emphasize the preservation of the existing transportation system.

D. Inclusion of a financial plan that considers the Financial Guidelines for Long Range Transportation Plans and:

1. Demonstrates how the adopted long-range transportation plan can be implemented which addresses cost of new capacity and cost of operation and maintenance,

2. Indicates resources from public and private sources that are reasonably expected to be made available to carry out the plan, and

3. Recommends any additional financial strategies for needed projects and programs.

4. The financial plan may include, for illustrative purposes, additional projects that would be included in the adopted transportation plan if reasonable additional resources beyond those identified in the financial plan were available.

E. For the purpose of developing the transportation plan, the Metropolitan Planning Organization, Transit Operator, and State shall cooperatively develop estimates of funds that will be available to support plan implementation.

F. The transportation plan shall identify transportation facilities (including major roadways, transit, multimodal and intermodal facilities, and intermodal connectors) that should function as an integrated metropolitan transportation system, giving emphasis to those facilities that serve national and regional functions.

G. A transportation plan involving Federal participation shall be published or otherwise made readily available by the metropolitan planning organization for
public review, including (to the maximum extent practicable) in electronically accessible formats and means, such as the World Wide Web, approved by the metropolitan planning organization.

H. The term Transportation Alternatives Program (TAP) means, with respect to any project or the area to be served by the project, any of the following activities if such activity relates to surface transportation: provision of facilities for pedestrians and bicycles, provision of safety and educational activities for pedestrians and bicyclists, acquisition of scenic easements and scenic or historic sites, scenic or historic highway programs, landscaping and other scenic beautification, historic preservation, rehabilitation and operation of historic transportation buildings, structures, or facilities, preservation of abandoned railway corridors, control and removal of outdoor advertising, archaeological planning and research, environmental mitigation to address water pollution due to highway runoff or reduce vehicle-caused wildlife mortality while maintaining habitat connectivity, and establishment of transportation museums.

I. There are multiple requirements for the metropolitan long range transportation plan as specified in federal law and regulation. They require that the LRTP, at a minimum:

1. Identify transportation facilities (including major roadways, transit, multimodal and intermodal facilities, pedestrian walkways and bicycle facilities, and intermodal connectors) that function as an integrated system, giving emphasis to facilities that serve important national, state, and regional transportation functions. {23 U.S.C. 134(i)(2)(A); 23 C.F.R. 450.322(f)(2)}

2. Include discussion of the types of potential environmental mitigation activities and potential areas to carry out these activities, including activities that may have the greatest potential to restore and maintain the environmental functions affected by the plan. This discussion shall be developed in consultation with federal, state, and tribal, wildlife, land management, and regulatory agencies {23 U.S.C. 134(i)(B)(i); 23 C.F.R. 450.322(f)(7)}

3. Include operational and management strategies to improve the performance of existing transportation facilities to relieve vehicular congestion and maximize the safety and mobility of people and goods. {23 U.S.C. 134(i)(2)(D); 23 C.F.R. 450.322(f)(3)}

4. Include capital investment and other strategies to preserve the existing and future system and provide for multimodal capacity increases based on regional priorities and needs. {23 U.S.C. 134(i)(2)(E); 23 C.F.R. 450.322(f)(5)}
5. Include proposed transit enhancement activities. \{23 \text{U.S.C. 134(i)(2)(F); 23 C.F.R. 450.322(f)(9)}\}

6. Identify the projected demand of persons and goods in the metropolitan planning area over the period of the plan \{23 \text{C.F.R. 450.322f}(f)(1)\}

7. Identify pedestrian walkway and bicycle transportation facilities in accordance with \{23 \text{U.S.C. 217(g); 23 C.F.R. 450.322f}(f)(8)\}

8. Describe proposed improvements in sufficient detail to develop cost estimates. \{23 \text{C.F.R. 450.322f}(f)(6)\}

In order to address the federal and state requirements for the Bay County TPO’s 2040 LRTP, the following tasks will be completed.

Task 1: Public Involvement – The public involvement aspect of this update will conform to federal and state guidelines and provide ample opportunity for the public to provide input and review as well as comment on the development of the plan.

Task 2: Congestion Management Process Plan (CMPP) - The CMPP is developed for and implemented within Bay County. The CMPP is a state and federally mandated document designed to support the transportation planning process. By collecting and mapping safety information annually, this update to the CMPP will formulate safety recommendations for inclusion in the planning process.

Task 3: Goals and Objectives - The goals, objectives and policies adopted at the outset of the long range transportation plan update will guide the study and will play a critical role in project ranking.

Task 4: Evaluation Criteria - To ensure that the projects in the Needs Plan are evaluated with a common set of criteria, a series of evaluation criteria will be developed that reflect the Goals and Objectives in Task 3.

Task 5: Financial Resources - Development of the Financial Resources – This task will produce information regarding existing and projected funding sources to be used in developing the Year 2040 Cost Feasible Plan.

Task 6: Year 2040 Transportation Needs Plan – This task includes development of the Year 2040 Needs Plan and shall include developing Plan Goals and Objectives, project evaluation criteria, and project benefit information. The plan will consider how the existing and proposed transportation facilities will function as an integrated, multi-modal system.

Task 7: Year 2040 Cost Feasible Plan – Elements of this task provide for the development of the Year 2040 Cost Feasible Plan. This shall include the development of a project ranking and
based, in part, on a benefit cost ratio analysis.

Task 8: Summary and Final Report – Technical Reports shall be developed for each task outlined above. In addition, a Final Report and a Summary Report will be produced outlining the 2040 LRTP.

II. WORK TASKS

TASK 1: PUBLIC INVOLVEMENT PROGRAM

Public participation is a critical component of the long range transportation planning process. Therefore, the CONSULTANT shall proactively implement the long range transportation plan strategies and procedures of the Public Involvement Plan so that the public shall have early and continuing involvement in the plan development process. This public participation process is intended to provide sufficient opportunity for involvement of public officials (including elected officials) and the public at large in the development of the long range transportation plan before its approval by the Bay County Transportation Planning Organization (TPO).

The TPO will develop a Public Involvement Plan (PIP) specifically for the 2040 Long Range Transportation Plan Update. This document will be the guide for conducting public outreach in support of the 2040 Long Range Transportation Plan Update. Elements of the PIP outline the following:

1. What communication tools will be used
2. The various points in the long range transportation plan where public involvement will be sought
3. Direction on how public meetings will be conducted

The utilization of key communication tools will enhance the public outreach process, ensure proper documentation of public responses, educate the public at every phase on the process and contribute to the development of a transportation plan that reflects the values, visions and ideals of the community.

Based on the PIP, the Public Involvement Team will utilize the following strategies to reach the public with information about the 2040 Long Range Transportation Plan Update:

1. Development of a slogan
2. Coordinating with partners
3. Development and distribution of E-Blasts
4. Strategic use of traditional and social media
5. Development of effective visual aids such as maps, charts, and graphs
6. Use of surveys and comments cards
7. Promotion of the long range transportation plan update
8. Public workshops at key points in the development of the long range transportation plan

The CONSULTANT shall be responsible for conducting the following public involvement activities:

- Development of a slogan and logo representing the 2040 Long Range Transportation Plan Update
- Development of a list of contacts for various community organizations with the goal of engaging these groups throughout the LRTP update process.
- Development of a schedule of outreach to targeted groups
- Draft a maximum of twenty-four (24) E-Blasts
- Development of a media contact list with the goal of providing the media with accurate and timely information on the LRTP update allowing them to report on the update efforts.
- Assist the TPO in maintaining the Facebook and project website
- Draft a maximum of twelve (12) press releases
- Development of display ads to be placed in local newspapers by the TPO promoting the public workshops.
- Development of effective visual aids such as maps, charts, and graphs
- Development and administration of surveys at public meetings, workshops and other public events
- Assist the TPO with TV and/or radio interviews
- Prepare materials in support of a speakers bureau
- Arrange for long range transportation plan presentations to be made at regular local government and community organizations’ meetings
- Determine which agencies/organizations publishes a newsletter; place workshop information in those newsletters
- Coordinate with agency partners to promote workshops on their website, local TV, etc.
- Assist the TPO with the development of opinion and editorial pieces to run in the local newspapers.
- The CONSULTANT shall develop five (5) newsletters. The newsletters will coincide with the following tasks: Kick-Off Meeting, Goals and Objectives, Needs Assessment, Cost Feasible Plan, and completion of the Long Range Transportation Plan.
- The CONSULTANT shall participate in at least eight (8) briefings each that shall be held for the Transportation Planning Organization (TPO) for the Citizens Advisory Committee (CAC), and Technical Coordinating Committee (TCC).
- Prepare for and conduct public workshop #1 early in the plan update process to give a status report on the current long range transportation plan implementation and to discuss the development of the vision statement, mission statement, goals and objectives.
- Prepare for and conduct public workshop #2 on the results of testing and evaluating alternative projects and refinement of the draft Needs Plan;
- Prepare for and conduct Year 2040 Needs Plan public meeting;
- Prepare for and conduct public workshop #3 on the adopted Year 2040 Needs Plan to obtain public input on projects that should be selected for the draft Year 2040 Cost Feasible Plan; and
- Prepare for and conduct Year 2040 Cost Feasible Plan public meeting.

The **TPO** shall be responsible for conducting the following public involvement activities:

- The **TPO** shall make public information available in electronically accessible format and establish a Long Range Transportation Plan web site.
- The **TPO** shall mail periodic newsletters during the Long Range Plan Process to individuals identified in a Long Range Transportation Plan contact list that will be expanded as new participants are identified. The list will be reviewed for inclusion of appropriate resource agencies and tribal governments.
- The **TPO** will place the legal and display ad required for each meeting and public workshop.

The public participation schedule shall provide for outreach to Federal, State, Tribal, land management and regulatory agencies. In addition, the public participation schedule shall also provide for outreach to citizens, affected public agencies, agencies responsible for natural resources, environmental protection, conservation and historic preservation, representatives of public transportation employees, freight shippers, providers of freight transportation services, private providers of transportation, representatives of users of public transportation, representatives of users of pedestrian walkways and bicycle transportation facilities, representatives of the disabled and other interested parties with responsible opportunities to be involved in the development of the long range transportation plan.

The **CONSULTANT** shall implement the Public Involvement Plan strategies for the long range transportation plan update which includes outreach to the elderly, persons with disabilities, minorities and low-income community and other groups traditionally under-represented in the plan update process. Strategies to solicit input from the business, environmental and other communities of local significance, such as focus groups, shall also be implemented.

**TPO** staff will ensure that the TPO complies with the Civil Rights Act of 1964, Executive Order 13166, and FTA Circular FTA C 4702.1B, October 2012, and that it fulfills the requirements under 4702.1B of the Limited English Proficiency (LEP) provisions. The **TPO** will provide those services for the development of the Draft and Final Long Range Transportation Plan as established within the Bay County TPO Language Assistance Plan.

**LRTP Steering Committee**

A LRTP Steering Committee will be established for the purpose of providing direction and oversight of the development of the 2040 LRTP. This committee will be made up of members from the
Citizens Advisory Committee (CAC) and the Technical Coordination Committee (TCC). The Steering Committee will meet often (in some cases, once a month) to review elements of the LRTP and provide direction to the consultant and TPO Staff. The Steering Committee will be most active during the development of the Needs and Cost Feasible Plan elements of the LRTP. They will also assist in the development/refinement of the Goals and Objectives and the project evaluation criteria. Membership on the Steering Committee will be determined by each advisory group.

**END PRODUCT TASK 1**

The **TPO** will develop a **Public Involvement Plan**, with assistance from the **CONSULTANT**. This Plan will document the public involvement strategies to engage transportation traditionally underserved in the development of the Long Range Transportation Plan.

The **CONSULTANT** shall develop a Public Involvement Plan Report, which will document all aspects of the public involvement efforts during the development of the 2040 Plan Update. The **TPO**, **FDOT**, and **FHWA** shall review the Public Involvement Plan Report. This report will not require TPO Board action as it will be included in the Final Report.

**TASK 2: CONGESTION MANAGEMENT PROCESS PLAN (CMPP) UPDATE**

The first process of the CMPP is the development of the goals and objectives. The context of the CMPP objectives is set by the Long Range Transportation Plan (LRTP). The vision and the goals of the 2040 LRTP will be used as guidance for the TPO’s regional mobility. Before adoption, the vision statement and goals will be presented to the general public for review, comment, and recommendations. The **CONSULTANT** will be responsible for updating the CMPP goals and objectives.

The **CONSULTANT** shall review and update the CMPP’s networks. The following networks will be identified in the CMPP report: Roadway; Transit; Travel Demand; Bicycle/Pedestrian; and Freight. The roadway network shall be based on the Federal Highway Administration (FHWA) Functional Classification System (post 2010 Census). The roadway network that is analyzed for the CMPP is comprised of state and major county roads well as an integrated system of airports, rail systems, multi-modal, and inter-modal facilities.

The **TPO** provides a fixed-route service to portions of Bay County. The Bay Town Trolley routes operating at the time of the update will be utilized for the CMPP Report.

The Commuter Assistance program, funded by the Florida Department of Transportation and staffed by the West Florida Regional Planning Council, offers employer based programs to assist in reducing single occupant vehicle travel to work sites. The Commuter Assistance Program coordinates users on a computer database with mapping capabilities to assist in forming carpools and vanpools. The current service area will be used for the CMPP Report.
The on-road bicycle network and the pedestrian network to be considered as part of the CMPP will be identical to the CMPP network. For the purposes of the update, bike lanes and paved shoulders will be considered on-road facilities.

The freight network is composed of the CMPP network. Although rail, water, and air cargo are available, the movement of goods is primarily by truck. Depending on vehicle type, some freight movement is restricted on certain roadways.

The **CONSULTANT** shall review and update the CMPP’s performance measures. Implementing performance measures provides a threshold of what levels of congestion are acceptable and what levels of congestion are not acceptable. The use of performance measures is a quantifiable method for analyzing the performance of the transportation system and the effectiveness of congestion management strategies. The employment of performance measures illustrates to what degree the CMPP is achieving its objectives.

An ad hoc committee composed of representatives of the Florida Department of Transportation (FDOT), local governments, citizens, and stakeholders will be formed to assist in the development of the CMPP.

The CMPP will be an integral part of the TPO’s planning process, including the LRTP, Transportation Improvement Program (TIP), Unified Planning Work Program, (UPWP), and the Public Participation Plan (PPP). The CMPP guides the planning process by:

- Identifying operations and management projects that can be included in the TPO’s TIP LRTP; and
- Identifying a set of congestion mitigation strategies that can be applied to congested corridors.

**DELIVERABLE**

The **CONSULTANT** shall prepare the Congestion Management Process Plan Report summarizing the efforts and findings under this task. The **TPO, FDOT, and FHWA** shall review the Congestion Management Process Plan Report. The **TPO Board** will be asked to approve the CMPP.

**TASK 3: GOALS AND OBJECTIVES**

The vision statement, mission statement along with the goals, objectives and policies adopted at the outset of the long range transportation plan update will guide the study and will play a critical role in project ranking. It is important that these goals consider (not listed in priority order):
• The need for integration and interconnectivity of non-motorized transportation alternatives for pedestrians and cyclists including sidewalks, bike lanes and recreational trails.
• The potential benefits of operations and management strategies to improve the overall operations of facilities.
• Transportation equity with special effort to engage the traditionally underserved.
• Information and data from the Community Impact Assessment.
• Assessing the distribution of benefits and adverse environmental impacts at both the plan and project level.
• The FDOT 2060 Transportation Plan.
• Emerging Issues such as safety and transit asset management, performance measurement, movement of freight, sustainable transportation, and context sensitive solutions.

END PRODUCT TASK 3

The **CONSULTANT** shall prepare a **Goals and Objectives Report**, which summarizes this task. The **TPO, FDOT, and FHWA** shall review the **Goals and Objectives Report**. The **TPO Board** will be asked to approve the Goals and Objectives Report.

**TASK 4: EVALUATION CRITERIA**

In order to ensure that the projects in the Needs Plan are evaluated with a common set of criteria, a series of evaluation criteria will be developed that reflect the Goals, Objectives and Strategies. The **TPO** will develop the evaluation criteria based on the adopted Goals and Objectives to evaluate projects identified in the Needs Plan alternatives. The Evaluation Criteria shall be approved by the **TPO** with input from the TCC, and the CAC.

In addition to the development and application of evaluation criteria, the **CONSULTANT** shall develop a cost/benefit analysis tool. This tool will facilitate a return-on-investment (ROI) when evaluating projects for inclusion in plans and programs. Costs usually include project development and construction, but not full life-cycle costs. Benefits typically include safety (reductions in fatalities, injuries and property loss accidents), delayed savings and possibly direct economic impacts (effects of labor and material expenditures multiplied appropriately through the local and state economy). To better consider the public’s return on the investment of its transportation funds, costs should also reflect life-cycle costs. Benefits should include the economic value of increased capacity and travel time reliability, and economic development/growth stimuli.
END PRODUCT TASK 4

The TPO shall prepare an Evaluation Criteria Report, which summarizes this task. The FDOT, FHWA and the CONSULTANT shall review the Evaluation Criteria Report. The TPO Board will be asked to approve the Evaluation Criteria Report.

TASK 5: FINANCIAL RESOURCES

Revenues expected to be available for transportation projects through the Plan horizon year, 2040, will be provided by FDOT. This revenue forecast will set parameters for what projects will be identified as cost feasible. For a project to be included in the cost feasible plan, an estimate of the cost and source of funding (in Year of Expenditure dollars) for each phase of the project being funded must be included. The phases to be shown in LRTPs include Preliminary Engineering, ROW and Construction (FHWA and FTA support the option of combining PD&E and Design phases into Preliminary Engineering).

The FDOT will provide the appropriate inflations factors which will be used to inflate current year costs to Year of Expenditure costs.

The costs of operating and maintaining the existing and future transportation system must also be clearly stated in the cost feasible plan, in a manner agreed upon by the MPOAC, FDOT, and FHWA/FTA.

FDOT shall provide information to the TPO showing operation and maintenance costs for state maintained facilities for inclusion in the LRTP. Local agencies, working with the TPO, need to provide cost estimates for locally maintained facilities covered in the Plan. The Operations and Maintenance (O&M) cost estimates need to be provided for each of the first ten years of the plan. For example, beyond the first ten years, if using five-year cost bands in the outer years, costs may be shown for each of the five-year cost bands. The LRTP will also need to demonstrate the source of funding for the O&M activities. A clear separation of costs for operations and maintenance activities from other grouped and/or regionally significant projects will need to be shown in order to demonstrate fiscal constraint. (23 CFR 450.322(f)(10)(i)).

FDOT, in cooperation with the MPOAC and Florida’s MPOs, prepares long range revenue forecasts for state and federal funds that flow through the FDOT Work Program and other financial planning guidance. FDOT, in cooperation with the MPOAC and Florida's TPOs, will develop an updated revenue forecast through 2040 and guidance for the updates of metropolitan transportation plans and the Florida Transportation Plan (FTP).

The Time Period for estimates is 5 years between the Base Year and the year 2030 will be as follows:
• 2014-2015,
• 2016-2020,
• 2021-2025,
• 2026-2030 and
• 2031-2040

This is essentially consistent with previous forecasts and simplifies reporting. The use of 5 and 10 year periods increases flexibility and reduces the need to fine tune project priorities.

Any project which will go beyond the horizon year of the LRTP will include an explanation of the project elements beyond the horizon year and what phases/work will be performed beyond the horizon year of the plan. The costs of work and phases beyond the horizon year of the plan will be estimated using Year of Expenditure (YOE) methodologies and the estimated completion date will be described as a band (i.e. Construction expected 2040-2050, $40M). If there is more than one phase remaining to be funded, these will be shown as a combined line item for the project (i.e. ROW/Construction expected 2040-2050, $50M).

For estimates of State and Federal Revenues:

• FDOT will provide Year of Expenditure (YOE) estimates for state capacity programs for the TPO, similar to prior forecasts.
• FDOT will provide system level estimates of the cost of operating and maintaining the State Highway System at the DOT District level. (the TPO should include the material in long range transportation plan documentation.)
• FDOT will work with the MPOAC to develop the detailed assumptions required for these estimates.

The cost feasible portion of the 2040 LRTP will use FY 2013/2014 as the base year and FY 2039/2040 as the horizon year.

The recommended Base and Horizon Years are for financial reporting purposes only and do not impact individual TPO selection of alternative Base and Horizon Years for socioeconomic, modeling and other purposes.

**END PRODUCT TASK 5**

The CONSULTANT shall prepare a Financial Resources Report, which summarizes this task. The TPO, FDOT, and FHWA shall review the Financial Resources Report. The TPO Board will be asked to approve the Financial Resources Report.
TASK 5: NEEDS ASSESSMENT

Additional capacity alternatives to additional roadway lanes will be reviewed. The purpose of this task is to develop a long range transportation plan that identifies projects (including major roadways, transit, multimodal and intermodal facilities, nonmotorized transportation facilities and intermodal connectors) to function as an integrated system. Emphasis will be given to those projects that serve important national and regional transportation functions. In addition, the long range transportation plan shall preserve existing transportation infrastructure, enhance economic competitiveness, improve travel choices to ensure mobility and integrate transportation and land use planning to provide for sustainable development and reduce greenhouse gas emissions.

Assessment Roadway Capacity Projects for 2040 shall be recommended by the CONSULTANT and reviewed by the TPO and the DEPARTMENT. A purpose and need statement for each roadway capacity project shall be completed by the CONSULTANT for projects that have not gone through ETDM. The TPO shall complete mapping and costing of projects. The CONSULTANT shall review the MPOAC Guidance for Defining and Reporting Needs.

This long range transportation plan update will consider demographic destiny as a major factor influencing the future mobility needs of the region. Demographic destiny deals with the fact that over the next four decades as our region grows we will see a more diverse population. One aspect of this will be an increasing diversity of who we are and how we live. Residents of and visitors to our region will not only be more diverse in terms of age and race, but they will inhabit a host of different environments, ranging from the more dense downtown areas to the suburbs, to the smaller towns. All of these people will have different needs and aspirations.

The CONSULTANT shall develop the Year 2040 Needs Plan by testing multi-modal alternatives to satisfy person and freight travel demands.

The CONSULTANT shall utilize the 2040 Needs Assessment Roadway Projects, the transportation model, and the TPO’s Congestion Management Program Process to determine a list of Corridor Management Plan Projects that are needed in 2040.

A Preliminary Needs Plan shall be developed by running 2040 zonal data (ZDATA) with the 2019 Existing Plus Committed Network and identifying facilities with a volume/capacity ratio of 0.9 or greater. The CONSULTANT and TPO shall review the facilities identified during this task. At the option of TPO, the CONSULTANT shall use National Cooperative Highway Research Program- 255 to smooth and adjust the travel demand outputs for identified facilities as necessary.

The CONSULTANT shall explore a maximum of three (3) alternatives to meet the future mobility demands for each corridor or facility with existing or forecasted deficiencies. These alternative needs plans shall consider the Vision Statement, Mission Statement, and the Goals and Objectives of this Long Range Transportation Plan Update. The alternatives may include one or more of the
following types of improvements (not shown in priority order):

- Transit improvements;
- Roadway widening or new roadway corridors;
- Bicycle improvements;
- Pedestrian improvements;
- Intelligent Transportation System (ITS) improvements;
- Operational improvements;
- Transportation Management Strategies; and
- Transportation Policy Statements based on the adopted Goals and Objectives.

It will be imperative that the projects work in concert to improve mobility throughout the region. The improvements should complement each other and provide mobility choices for the diverse population of 2040. The 2040 Long Range Transportation Plan will be a balanced mobility plan that considers the needs of people as well as the need to move goods and services efficiently.

The TPO has established a Community Impact Assessment (CIA) database. From this database, a community profile was developed. Presentations will be scheduled with groups representing the communities in the urbanized area. These citizens will develop a list of transportation projects they envision to be needed in 2040.

The most current Bicycle/Pedestrian Plan and Transportation Alternatives Program (TAP) Priorities will be utilized to determine which Bicycle/Pedestrian Projects are needed in 2040.

A review of the previous Long Range Transportation Plan, the most current Transit Development Plan, and the current Transit Capacity and Quality of Service shall be completed by the CONSULTANT to determine what public transportation projects are needed in 2040.

The CONSULTANT shall employ context sensitive solutions for appropriate transportation corridors by using a collaborative approach that involves stakeholders to identify needed transportation projects that preserve and enhance scenic, aesthetic, historic, community and environmental resources, while improving or maintaining safety, mobility and infrastructure conditions.

The CONSULTANT shall identify projects to include in the Needs Plan that enhance intermodal connections between various modes of travel, including the automobile, bus rapid transit, streetcar, bicycle and pedestrian.

Project cost estimates are typically expressed in Present Day Cost (PDC) and will be adjusted with inflation factors for the time period during which they are planned to be implemented.
To adjust costs from PDC to Year of Expenditure (YOE), FDOT has developed estimates of inflation factors through 2040 that the TPO will use. FDOT will provide documentation of the assumptions used to develop those factors.

The recommended Time Period for costs are five (5) years between the Base Year and the year 2030 and 10 years for the remaining years of the Plan:

- 2014-2015,
- 2016-2020,
- 2021-2025,
- 2026-2030, and
- 2031-2040.

Annual inflation factor estimates will be used to estimate “mid-point” factors for project costs during each respective 5 or 10 year period.

The DEPARTMENT will provide YOE cost estimates, phasing and project descriptions for projects included in the 2040 Strategic Intermodal System (SIS) Cost Feasible Plan to the TPO.

The Needs Plan shall include sufficient data and information to define the identified need. The CONSULTANT shall include an estimate of unfunded needs plan costs in base year dollars in the adopted long range transportation plan. Estimated needs shall be reported by mode.

For total project costs, each phase of a project must be described in sufficient detail to estimate total project cost and explain how the project is expected to be implemented. Any project which will go beyond the horizon year of the LRTP must include an explanation of the project elements beyond the horizon year and what phases/work will be performed beyond the horizon year of the plan. The costs of work and phases beyond the horizon year of the plan must be estimated using Year of Expenditure (YOE) methodologies and may be described as a band (i.e. Construction expected 2041-2050). FHWA does not expect this will apply to routine system preservation or maintenance activities. Total project costs will be shown for capacity expansion projects. System operations and management strategies such as ITS projects will be expected to show total project costs. This last category of projects may include a mixture of specific projects as well as grouped projects. (23 CFR 450.322(f)).

Needs Assessment Capacity Projects for 2040 shall be organized in a Microsoft Excel Spreadsheet by the CONSULTANT and reviewed by the TPO and the DEPARTMENT. A purpose and need statement for each roadway capacity project shall be completed by the CONSULTANT. The CONSULTANT shall complete the cost estimates of the proposed projects.

The TPO staff shall map the 2040 Needs Assessment Projects in GIS.

The Steering Committee, which was established in Task 1 Public Involvement, shall have an
opportunity to initiate, review, and comment on the draft 2040 Needs Assessment Projects. This opportunity will be through a meeting that the CONSULTANT facilitates.

**END PRODUCT TASK 6**

The TPO staff shall prepare a Needs Assessment Report, which summarizes this task. The CONSULTANT, FDOT, and FHWA shall review the Needs Assessment Report. The TPO Board will be asked to approve the Needs Assessment Report and specifically the list of Needs Plan projects.

**TASK 7: COST FEASIBLE PLAN**

Upon approval of the Year 2040 Needs Plan by the TPO, the CONSULTANT shall develop up to three (3) Cost Feasible Plan Alternatives based on the financial resources identified in Task 5. The CONSULTANT shall include an estimate of the cost of all projects and all phases, regardless of mode, in year of expenditure dollars. The CONSULTANT shall use Florida Department of Transportation adopted estimates of inflation to adjust costs from present day costs to year of expenditure costs. The CONSULTANT shall also clearly state in the proposed Year 2040 Cost Feasible Plan the costs of operating and maintaining the existing and future transportation system.

Analysis of project(s) benefit-cost (B-C) will be performed. This can include individual projects or clusters/bundles of projects to rank affordable solutions to anticipated transportation needs.

The TPO staff shall develop maps for the three 2040 Cost Feasible Plan alternatives and the final adopted Cost Feasible Plan.

Based upon this process, the CONSULTANT shall develop up to three (3) Alternative Cost Feasible Plan Scenarios that shall establish the basis for identifying a final Year 2040 Cost Feasible Plan. These scenarios shall be based on prior input received from the public and shall represent three unique proposals to address transportation system needs through the Year 2040.

The CONSULTANT shall develop a Purpose and Needs Statement for new Cost Feasible Plan Projects that need to be entered into the Efficient Transportation Decision Making (ETDM) Process.

The LRTP Steering Committee shall have an opportunity to review and comment on the draft Cost Feasible Plan Projects.

The CONSULTANT will also include the Operations and Maintenance Costs of the Roadway Capacity Projects.

Because projects in a Transportation Improvement Program (TIP) are required to demonstrate planning consistency with the LRTP, the requirements for project inclusion in a TIP must also be considered when developing the LRTP. As a reminder, projects that need to be included in the TIP
are: all projects utilizing FHWA and/or Federal Transit Agency (FTA) funds; all regionally significant projects requiring a FHWA or FTA action regardless of funding source; and regionally significant projects to be funded with other Federal funds than those administered by FHWA or FTA or regionally significant projects funded with non-federal funds (23 CFR 450.324(d)).

For highway projects, the long range transportation plan must include a discussion on environmental mitigation that is developed in consultation with Federal, State and Tribal entities, as well as agencies that regulate wildlife and manage lands. This discussion should occur at more of a system-wide level to identify areas where mitigation may be undertaken (perhaps illustrated on a map) and what kinds of mitigation strategies, policies and/or programs may be used. This discussion in the long range transportation plan would identify broader environmental mitigation needs and opportunities that could be applied to individual transportation projects. FDOT’s Efficient Transportation Decision Making (ETDM) system provides a web-based, system-wide environmental screening tool for initial agency review of Cost Feasible projects. This screening leads to further review and consultation on the required Class of Action and any proposed mitigation necessary for environmental approval. Documentation of the consultation with the relevant agencies should be maintained by the TPO. (23 CFR 450.322(g))

For public transportation or transit projects, which may develop as part of a discretionary grant process and award, the environmental class of action is usually considered by FTA regional offices in concert with transit grantees as the projects are analyzed and developed. Transit maintenance and transfer facilities and major capacity projects like light, heavy or commuter rail, Bus Rapid Transit (BRT), etcetera may require a separate NEPA document while acquisition of vehicles, provision of repairs, planning studies, engineering, etcetera, would not require a document. As such, environmental mitigation issues would tend to be developed as part of the NEPA document for specific projects with a NEPA decision made prior to the award of FTA funds. Likewise, environmental benefits for public transportation or transit options, like reduction in Single Occupant Vehicle (SOV) trips and Vehicle Miles Traveled (VMT), reduction in greenhouse gases, pedestrian and bicycle linkages, transit oriented/compact development (which is more walkable) may need to be stated within the broad parameters in the LRTP.

The 2040 Cost Feasible Plan will include both long-range and short-range strategies/actions that lead to the development of an integrated multimodal transportation system to facilitate the safe efficient movement of people and goods in addressing current and future transportation demand.

The TPO Board and all advisory committees shall have an opportunity to review and comment on the draft Cost Feasible Plan Projects prior to adoption. This opportunity will be through a meeting/workshop that the CONSULTANT facilitates.

**END PRODUCT TASK 7**

The TPO shall prepare a Cost Feasible Plan Report, which summarizes this task. The CONSULTANT,
FDOT, and FHWA shall review the Cost Feasible Plan Report. The TPO Board will be asked to approve the Cost Feasible Plan Report.

**TASK 8: SUMMARY AND FINAL REPORTS**

The CONSULTANT shall provide one clean, single-sided, full color draft of the Final Report for review by the TPO Board, the Citizens Advisory Committee, and the Technical Coordinating Committee. Subsequent to this review, the CONSULTANT shall include all review comments and provide to the TPO Staff one clean, single-sided, loose-leaf, full color paper original and Adobe Portable Data File (PDF) and Microsoft Word electronic version.

Copies of all final documents and maps shall be provided to the TPO on compact disks or DVD in editable text/graphic software format, including GIS shapefiles and Adobe Portable Data File (PDF) format.

The Adopted Year 2040 Cost Feasible Plan shall be published or otherwise made readily available by the TPO for public review, including (to the maximum extent practicable) in electronically accessible formats and means, such as the internet. Consistent with the FHWA guidance issued in November of 2012, the final documentation will be completed within 90 days of the TPO action adopting the final element of the LRTP Update, the Cost Feasible Plan. With 90 days of adoption, the final report will be reviewed by the reviewing agencies, edited and made available on-line and at the TPO’s offices.

The CONSULTANT shall provide all document and map files in the original software format each were developed in. This will allow the TPO to make future edits to the documents and maps as necessary.

**SUMMARY REPORT**

The CONSULTANT shall prepare the summary report with input from the TPO. The final 2040 long range transportation plan report shall also include a folded, full color poster of the adopted Year 2040 Cost Feasible Plan. Summary information in the Summary Report shall include the vision statement, mission statement, graphic representations of the Year 2040 Cost Feasible Plan and a table representation of the project list. Other information may include the goals and objectives of the plan. The CONSULTANT shall provide to the TPO five-hundred (500) copies of the Summary Report upon final approval of the TPO.

**FINAL REPORT**

The 2040 Long Range Transportation Plan Final Report shall be presented as a standalone, bound document. The CONSULTANT shall provide the TPO twenty (20) draft copies for review and
comment and thirty (30) final color printed copies, 60 electronic copies on CD-ROM, a copy of the final report files on CD-ROM/DVD media, as well as produce one clean, single-sided, loose-leaf, full color final report.

III. REPORTING

A number of reporting activities are required within this contract. These will include the following:

- **Task Reports**,  
- **Summary Report**,  
- **Final Report**, and  
- **Progress Reports**.

All of the reports, except for the Progress Reports, were discussed earlier in the scope. The development of these reports will require close coordination between the **TPO**, the **CONSULTANT**, and the **DEPARTMENT**.

The **CONSULTANT** shall prepare monthly Progress Reports to the **TPO** for their phase of the work. The **TPO** will prepare monthly Progress Reports to the **DEPARTMENT** for the entire project. Progress Reports will document progress in the previous month, problems encountered and their solutions, adherence to schedules, and planned activities for the next month. Invoices for the previous month's service will be attached. Invoices will be based upon estimates of percent work completed within each task. The **CONSULTANT** will provide Progress Reports to the **TPO** by the **10th day of each month** for their phase of the work. The **TPO** will provide Progress Reports to the **DEPARTMENT** by the **20th day of each month** and will be available to discuss with the **DEPARTMENT** any problems that are encountered.

IV. PROJECT SCHEDULE AND MANAGEMENT

The **TPO** shall work closely with the **DEPARTMENT** to manage and schedule work activities for the project. Within two weeks of receipt of Notice to Proceed, the **CONSULTANT** shall submit the proposed project schedule to the **TPO** and the **DEPARTMENT** for approval.

The detail required of the **CONSULTANT** shall be sufficient to show start and completion dates, delivery or due date as appropriate for each major work activity, decision points, critical meetings, or deliverables for the Project. Detail will specifically show responsibility of the **CONSULTANT**, the Subconsultant(s), **TPO**, and of the **DEPARTMENT**. The project schedule shall specifically be coordinated with progress reports and billing submittals to the **TPO**.
V. **MEETINGS**

The **TPO** and the **CONSULTANT** will conduct three types of meetings during the course of this project. Conference calls can replace some of the meetings.

1. **Briefings**

Through the course of the update, it will be necessary for the **DEPARTMENT** and the **TPO** to meet with the **CONSULTANT**. During the Plan Update process, some meetings will have to occur between the three parties. The meetings will be held in Pensacola or Chipley. The purpose will be for the **CONSULTANT** to brief the **DEPARTMENT** and **TPO** on project progress and any problems encountered.

2. **Technical Presentations**

Technical presentations to the transportation planning committee structure (**TPO, TCC, and CAC**) will be made a minimum of eight (8) times and maximum of fifteen (15) times by the **CONSULTANT** during the course of this project. These presentations at a minimum will be scheduled to occur at the beginning of this effort and development of major tasks during development of the Long Range Plan Update. These meetings will be scheduled by the **TPO**, to the extent possible, in such a way as to permit presentations to more than one committee during a single trip in the area.

3. **Public Meetings**

The **CONSULTANT** will make presentations at a series of public workshops throughout the development of the Long Range Transportation Plan.

VI. **MAJOR RESPONSIBILITIES OF THE DEPARTMENT**

The **DEPARTMENT** will:

1. Validate the 2010 Transportation Model using the Regional Model for Bay County Long Range Transportation Plan Study Area;
2. Meet with **TPO** to develop a Transportation Cost Report and Year of Expenditure Estimates;
3. Appoint a Project Manager to work on the update with the **TPO**;
4. Develop the Operations and Maintenance Costs.

VII. **MAJOR RESPONSIBILITIES OF THE TPO STAFF**

In addition to the items identified under Task 1, The **TPO** will:
1. Provide the available transportation reports for the area,
2. Coordinate various technical meetings and the public involvement process meetings and public hearing,
3. Assist with the facilitation of meetings,
5. Assist with the development of the Congestion Management Process Plan (CMPP),
6. Provide timely reviews of all material and documents as submitted by the CONSULTANT as specified herein,
7. Assist in the development of the Financial Resources,
8. Assist in the development of the Needs Plan,
9. Assist in the development of the Cost Feasible Plan,
10. Assist in the development of the Summary Report,
11. Assist in the development of the Final Report,
12. Develop Transportation Projects Costs,
14. Prepare monthly progress reports to the FDOT

VIII. MAJOR RESPONSIBILITIES OF THE CONSULTANT

In addition to the items identified under Task 1, The CONSULTANT will:

1. Staff public meetings and prepare press releases.
2. Complete Community Impact Assessment,
3. Facilitate Focus Group and/or Steering Committee Meetings,
4. Develop the Public Involvement Report,
5. Develop the Congestion Management Process Plan (CMPP),
6. Coordinate facilities for all meetings,
7. Develop the 2040 Goals and Objectives Report.
8. Prepare Needs and Cost Feasible Plan project in Excel Spreadsheet,
9. Update and prepare Purpose and Needs Statements,
10. Collect the necessary financial data from the TPO member governments and produce the financial resources report,
11. Develop up to three Cost Feasible Plan Alternatives,
12. Make presentations with applicable graphics to local committees and the public for input in plan evaluation and for plan selection and adoption,
13. Provide the TPO with task reports on Compact Disk in Microsoft Word,
14. Prepare a Summary Report,
15. Prepare a Final Report, and
16. Prepare monthly progress reports to the TPO.
IX. MAJOR RESPONSIBILITIES OF LOCAL GOVERNMENTS, PANAMA CITY / BAY COUNTY REGIONAL AIRPORT, AND PORT OF PANAMA CITY

The LOCAL GOVERNMENTS will:

1. Provide copies of their Capital Improvement Programs to the TPO as well as Operations and Maintenance Costs and how they were developed.

The PANAMA CITY / BAY COUNTY REGIONAL AIRPORT will:

1. Provide a copy of the Airport Master Plan to the TPO.

The PORT OF PANAMA CITY will:

1. Provide a copy of the Port Master Plan to the TPO.

The NORTHWEST FLORIDA TRANSPORTATION CORRIDOR AUTHORITY will:

1. Provide a copy of the Master Plan.

The LOCAL MILITARY INSTALLATIONS will:

1. Provide copies of their Installation Master Plans

X. DOCUMENTATION

1. Task Reports

FHWA and FTA expect that at the time the TPO board adopts the long range transportation plan, a substantial amount of long range transportation plan analysis and documentation will have been completed, and all final documentation will be available for distribution no later than 90 days after the plan’s adoption. The TPO Board and its advisory committees, as well as the public should have periodically reviewed and commented on products from interim tasks and reports that culminate into the final Plan. Finalizing the LRTP and its supporting documentation should be the last activity in a lengthy process. All final documents should be posted online and available through the TPO office no later than 90 days after adoption.

All products provided by the CONSULTANT to the TPO shall be in an electronic form, which is compatible with, and specified by, the TPO. Draft copies will be presented for CONSULTANT, FDOT, FHWA and TPO review and comment prior to presentation. Twenty
(20) draft copies will be prepared for review. Twenty-five (25) final draft copies will be printed with unbound original copy provided for the TPO File. The task reports shall be completed in Microsoft Word. The TPO will put the Final Task Reports, the Summary Report, and the Final Report on the Long Range Plan Web Site.

The TPO shall prepare the following Task Reports:

- **TASK REPORT #4 – EVALUATION CRITERIA (TPO Approval; TCC, CAC Review)**
- **TASK REPORT #6 – NEEDS ASSESSMENT (TPO Approval; TCC, CAC Review)**
- **TASK REPORT #7 – COST FEASIBLE PLAN (TPO Approval; TCC, CAC Review)**

The CONSULTANT shall prepare the following task reports:

- **TASK REPORT #1 – PUBLIC INVOLVEMENT (TPO Approval; TCC, CAC, Review)**
- **TASK REPORT #2 – CONGESTION MANAGEMENT PROCESS PLAN (CMPP) (TPO Approval; TCC, CAC Review)**
- **TASK REPORT #3 – GOALS AND OBJECTIVES (TPO Approval; TCC, CAC, Review)**
- **TASK REPORT #5 – FINANCIAL RESOURCES (TPO Approval; TCC, CAC, Review)**

2. **Summary Report**

The CONSULTANT shall prepare five hundred (500) copies of the final summary report and shall be printed by the CONSULTANT for distribution in black and white and a minimum of two other colors. A camera-ready color copy will be provided to the TPO for additional future printing. The CONSULTANT shall also include the Summary Report on CD to the TPO.

3. **Final Report**

The CONSULTANT shall prepare, print, and distribute the Final Report. The CONSULTANT shall prepare twenty (20) draft copies for review and thirty (30) final copies and 60 electronic copies on CD-ROM, a copy of the final report files on CD-ROM/DVD media, as well as produce one clean, single-sided, loose-leaf, full color final report.

4. **Monthly Progress Reports**
The **CONSULTANT** shall provide one (1) copy of a progress report to the **TPO** each month. The **TPO** shall provide the **DEPARTMENT** with two (2) copies of the progress report each month. The report is required regardless of project status or payment request.
Appendix A

2012 LRTP Expectation Letter

Federal Strategies for Implementing Requirements for LRTP Update for the Florida MPOs

November 2012

The Federal Highway Administration (FHWA), in cooperation with the Federal Transit Administration (FTA), developed the following summary to provide clarification to the Florida Department of Transportation (FDOT) and Florida’s Metropolitan Planning Organizations (MPOs) regarding our expectations for meeting some of the requirements to be addressed in the next cycle of Long Range Transportation Plan (LRTP) updates. 23 CFR 450.306, 316 and 322 describe the basic requirements of the metropolitan transportation planning process, including a documented public participation plan and development and content of the metropolitan transportation plans respectively. The following information is presented to highlight notable areas for improvement, as well as those of potential concern, and to assist the MPOs in meeting federal planning requirements. Additional areas may be addressed on an individual MPO basis as needed throughout the LRTP development process.

Because projects in a Transportation Improvement Program (TIP) are required to demonstrate planning consistency with the LRTP, the requirements for project inclusion in a TIP must also be considered when developing the LRTP. As a reminder, projects that need to be included in the TIP are: all projects using FHWA and/or FTA funds; all regionally significant projects requiring an FHWA or FTA action regardless of funding source; and regionally significant projects to be funded with Federal funds other than those administered by FHWA or FTA or regionally significant projects funded with non-federal funds (23 CFR 450.324(d)). There are exceptions for certain projects such as emergency relief and state planning and research projects. All of the exempt project categories can be found in 23 CFR450.324(c). The reference to regionally significant projects applies to capacity and non-capacity projects. Capacity projects are projects that expand the capacity of existing transportation systems, such as adding lanes to roadways, new/expanded rail service and intermodal facilities. Non-capacity projects are activities that are designed to support, operate and maintain the state transportation system (See Appendix 1 for a list of capacity and non-capacity programs/activities).
Projects in the LRTP: Recently we have been responding to several questions regarding types of projects that need to be included in the LRTP. As stated in 23 CFR 450.322(f), the LRTP is required to include the projected transportation demand in the planning area, the existing and proposed transportation facilities that function as an integrated system, operational and management strategies, consideration of the results of the Congestion Management Plan, strategies to preserve the existing and projected future transportation infrastructure, pedestrian and bicycle facilities, and transportation and transit enhancement activities.

As noted in 23 CFR 450.104, a regionally significant project means a transportation project (other than projects that may be grouped in the TIP and/or STIP or exempt projects as defined in EPA’s transportation conformity regulation (40 CFR part 93.126, 127 and 128)) that is on a facility which serves regional transportation needs (such as access to and from the area outside the region; major activity centers in the region; major planned developments such as new retail malls, sports complexes, or employment centers; or transportation terminals) and would normally be included in the modeling of the metropolitan area’s transportation network. At a minimum, this includes all principal arterial highways and all fixed guideway transit facilities that offer a significant alternative to regional highway travel.

If a project meets the definition of regionally significant, then the project must be included in the Cost Feasible LRTP regardless of the project’s activities (i.e. construction, facility widening, ITS installations, etc.).

Grouped Projects in the LRTP: Federal regulations allow a specifically defined type of project(s) to be grouped in the TIP. Similar groupings in the LRTP would be permissible. However, the ability to group project(s) depends on the regional significance of the project(s). Grouped projects in the TIP are typically ones that are not of an appropriate scale to be individually identified and can be combined with other projects which are similar in function, work type, and/or geographic area. Classifications of these grouped project types are listed under 23 CFR 771.117(c) and (d) and/or 40 CFR part 93. Examples are: activities which do not involve or lead directly to construction (such as planning and technical studies or grants for training and research programs); construction of non-
regionally significant bicycle and pedestrian lanes, paths, and facilities; landscaping; installation of fencing, signs, pavement markings, small passenger shelters, traffic signals, and railroad warning devices where no substantial land acquisition or traffic disruption will occur; rest areas and truck weigh stations; ridesharing activities; and highway safety or traffic operations improvement projects. Therefore, if grouping projects in the LRTP, the groups need to be specific enough to determine consistency between the LRTP and the TIP.

**Fiscal Constraint Operations & Maintenance**: LRTP cost estimates need to be provided for the Operations and Maintenance (O&M) activities for the entire timeframe of the LRTP. System level estimates for O&M costs may be shown for each of the five-year cost bands or may be provided as a total estimate for the full LRTP timeframe. System level is interpreted to mean the system within the MPO planning boundaries. Local agencies, working with the MPO, need to provide cost estimates for locally-maintained facilities covered in the Plan. FDOT, working with the MPO, needs to provide cost estimates for the state-maintained facilities covered in the Plan. System level estimates at the FDOT District level are acceptable for the state-maintained facilities. The LRTP will also need to identify the general source of funding for the O&M activities. Since O&M costs and related revenues are not available to balance the fiscal constraint of capital investment projects, a clear separation of costs for operations and maintenance activities from other grouped and/or regionally significant projects will need to be shown in order to demonstrate fiscal constraint. (23 CFR 450.322(f)(10)(i)).

**Total Project Costs**: For total project costs, all phases of a project must be described in sufficient detail to estimate and provide an estimated total project cost and explain how the project is expected to be implemented. Any project which will go beyond the horizon year of the LRTP must include an explanation of the project elements beyond the horizon year and what phases/work will be performed beyond the horizon year of the plan. The costs of work and phases beyond the horizon year of the plan must be estimated using Year of Expenditure (YOE) methodologies and the estimated completion date may be described as a band (i.e. Construction expected 2040-2050, $40M). If there is more than one phase remaining to be funded, these may be shown as a combined line item for the project (i.e. ROW/Construction expected 2040-2050, $50M). FHWA does not expect that this paragraph will apply to routine system preservation or maintenance activities. Total project costs will
be shown for capacity expansion projects and for regionally significant projects. (23 CFR 450.322(f)).

**Cost Feasible Plan:** Revenues to support the costs associated with the work/phase must be demonstrated. For a project to be included in the cost feasible plan, an estimate of the cost and source of funding for each phase of the project being funded (including the Project Development and Environment (PD&E) phase) must be included. The phases to be shown in LRTPs include Preliminary Engineering, ROW and Construction (FHWA and FTA support the option of combining PD&E and Design phases into “Preliminary Engineering”). Boxed funds can be utilized as appropriate to finance projects. However, the individual projects utilizing the box need to be listed, or at a minimum, described in bulk in the LRTP (i.e. PD&E for projects in Years 2016-2020). (23 CFR 450.322(f)(10)).

**New Revenue Sources:** If the LRTP assumes a new revenue source as part of the cost feasible plan, the source must be clearly explained, why it is considered to be reasonably available, when it will be available, what actions would need to be taken for the revenue to be available, and what would happen with projects if the revenue source was not available. If, for example, the most recent action of a governing body or a referendum of the public defeated a similar revenue source, then the new revenue source may not be included in the Cost Feasible LRTP unless the MPO can justify the revenue source and explain the difference between the action that failed and the action being proposed (for further details, please see FHWA Guidance Financial Planning and Fiscal Constraint for Transportation Plans and Programs issued by Gloria Shepherd, Associate Administrator for Planning, Environment and Realty on April 17, 2009). This applies to all revenue sources in the LRTP (i.e. federal, state, local, private, etc.)

**Federal Revenue Sources:** Federal and state participation on projects in the Cost Feasible LRTP can be shown as a combined source for the cost feasible projects. Projects within the first ten years of the Plan must be notated or flagged to identify which projects are planned to be implemented with federal funds. Beyond the first ten year period, the specific federal funding notation is not expected. The project funding, however, must be clearly labeled as a combined Federal/State source in the Cost Feasible LRTP. (23 CFR 450.322(10)f(iii))
For FTA funded projects, MAP-21 has repealed eight programs from SAFETEA-LU and shifted many of the eligible activities to formula programs. Repealed programs (or uses consolidated in other formula programs) include Clean Fuels (5308), Fixed Guideway Modernization (5309), Bus and Bus Facilities (5309), JARC (5316), New Freedom (5317), Paul Sarbanes Transit in the Parks (5320), Alternatives Analysis (5339) and Over the Road Bus (3038). Formula programs now include Metropolitan Planning and State Planning (5305); Urbanized Area Formula (5307); Enhanced Mobility of Seniors and Persons with Disability (5310); Rural Area Formula (5311) and RTAP (5311); Formula Grants for Public Transportation on Indian Reservations (5311); Research and Development, Demonstration and Deployment (5312), State of Good Repair (5337), Bus and Bus Facilities Formula Grants (5339). Eligible new uses which are notable include Safety Programs and Transit Asset Management, Operations in areas with 200,000 or more population with up to 100 buses; Transit Oriented Development Planning and Bus Rapid Transit demonstration projects; Core Capacity Improvements and several others.

Discretionary awards that have been repealed under MAP-21 however, may have unspent funds awarded under SAFETEA-LU in the repealed programs that still must be shown in the LRTP, TIP and STIP to obligate the funds in FTA’s TEAM system. Hence, project categories such as Bus Livability, Clean Fuels, Alternatives Analysis, Transit in the Parks, etc.) may still need to be described and/or pursued by the transit grantee within the LRTP for FFY 2011 and FFY 2012 funds remaining. However, MAP-21 greatly reduced the number and type of discretionary awards through FTA. As such, the MPO and the transit grantee may no longer need to consider how to account for the possibility of placing a discretionary transit project through a competitive award (as well as formula funds) as part of the cost feasible LRTP except for New Starts, Small Starts, Core Capacity, Bus Rapid Transit Demonstration or Transit Oriented Development Demonstration Planning programs.

The purpose, need and perceived benefit of the transit project as well as geographic distribution of funds may play a role in project selection. As such, a transit needs plan with projects which may be unfunded when the LRTP is prepared may need to be considered, especially for major New Start/Small Start and other capital projects like the new Core Capacity program which must eventually be placed within the cost feasible LRTP to have funds awarded. Regardless, discretionary awards if
any must also be eventually listed within the cost feasible LRTP for FTA to obligate the awarded funds in a grant to a transit grantee.

**Full Timespan of the LRTP:** The LRTP is a document that has a planning horizon of at least 20 years. The LRTP is based upon the region’s visioning of the future within the bounds of the financial resources that are available to the region during that timeframe. The LRTP is not a programming document, but rather a planning document that describes how the implementation of projects will help achieve the vision. Therefore, the MPOs will need to show all the projects and project funding for the entire time period covered by the LRTP, from the base year to the horizon year. (23 CFR 450.322(a))

**Environmental Mitigation:** For highway projects, the LRTP must include a discussion on the types of potential environmental mitigation activities and opportunities which are developed in consultation with Federal, State and Tribal wildlife, land management and regulatory agencies. This discussion should occur at more of a system-wide level to identify areas where mitigation may be undertaken (perhaps illustrated on a map) and what kinds of mitigation strategies, policies and/or programs may be used. This discussion in the LRTP would identify broader environmental mitigation needs and opportunities that individual transportation projects might later take advantage of. MPOs should be aware that the use of ETDM alone is not environmental mitigation. That effort would be considered project screening and is not a system-wide review. Documentation of the consultation with the relevant agencies should be maintained by the MPO. (23 CFR 450.322(f)(7) and (g))

For transit capital projects, the environmental class of action is usually considered by FTA regional offices in concert with transit grantees as the projects are analyzed and developed. Transit maintenance and transfer facilities and major capacity projects like light, heavy or commuter rail, BRT, etc. may require a separate National Environmental Policy Act (NEPA) document while acquisition of vehicles, provision of repairs, planning studies, engineering, etc, would not require a document. As such, environmental mitigation issues would tend to be developed as part of the NEPA document for specific projects with a NEPA decision made prior to the award of FTA funds. Likewise, transit environmental benefits like reduction in SOV trips and VMT, reduction in
greenhouse gases, pedestrian and bicycle linkages, transit oriented/compact development (which is more walkable) may need to be stated within the broad parameters in the LRTP. Most FTA planning studies are required to be listed in the Unified Planning Work Program (UPWP) and not necessarily the TIP and STIP (although many MPO’s still list the studies in the TIP and STIP). Preliminary engineering, final design, right of way, utility relocation, construction, etc. for transit capital projects would need to be listed in the LRTP, TIP and STIP.

Linking Planning and NEPA: Since 2008, prior to FHWA approving an environmental document (Type-2 Categorical Exclusion, Finding of No Significant Impact, or Record of Decision) and thereby granting location design concept approval, the project must be determined to be consistent within the LRTP, the TIP and Statewide Transportation Improvement Program (STIP). The project consistency refers to the description (for example project name, termini and work activity) between the LRTP, the TIP and the STIP (23 CFR 450.216(k), 450.324(g) and 450.216(b)). The NEPA document must also describe how the project is going to be implemented and funded. The project implementation description in the NEPA document needs to be consistent with the implementation schedule in the LRTP and TIP/STIP as well.

LRTP Documentation/Final Board Approval: FHWA and FTA expect that at the time the MPO board adopts the LRTP, a substantial amount of LRTP analysis and documentation will have been completed, and all final documentation will be available for distribution no later than 90 days after the plan’s adoption. The Board and its advisory committees, as well as the public should have periodically reviewed and commented on products from interim tasks and reports that culminate into the final Plan. Finalizing the LRTP and its supporting documentation should be the last activity in a lengthy process. All final documents should be posted online and available through the MPO office no later than 90 days after adoption. The MPOs’ schedules for this round of LRTP development are expected to allow for the Board to adopt the final LRTP no later than 5 years from the MPOs’ adoption of the previous LRTP.
Documented LRTP Modification Procedures: If not already in place, MPOs need established written and Board approved procedures that document how modifications to the LRTP are addressed after Board adoption. The procedures should specifically explain what qualifies as a modification as opposed to an amendment as defined in 23 CFR 450.104. These procedures can be included as part of the LRTP, the PPP, or provided elsewhere as appropriate. FHWA is currently beginning work with FDOT and the MPOs on an LRTP amendment process which will include statewide procedures and thresholds, similar to the STIP amendment process. This effort will assist the MPOs in determining when LRTP amendments are required.

LRTP & STIP/TIP Amendment Consistency: The STIP and TIPs must be consistent with the relevant LRTPs. When amendments to the STIP/TIP are made, the projects must also be consistent with the LRTP from which they are derived. FHWA and FTA staff will be checking for this consistency. Projects with inconsistencies between the STIP/TIP and the respective LRTP will not be approved for use of federal funds or federal action until the issue is addressed. (23 CFR 450.328 and 23 CFR 450.216(b))

FHWA and FTA understand that when developing project cost estimates in an LRTP, the cost is an estimate which becomes more refined as a project advances. Projects being refined between plans will not be required to update their costs in the existing LRTP if new, more accurate information regarding project cost becomes available. However, it is expected that upon the next scheduled adoption of the LRTP, the latest project cost estimates shall be used.

Transit Projects and Studies

Major Transit Capital Projects: For LRTP development purposes, federal funding sources for major transit capital projects must be proposed and may not currently be identifiable (or currently allocated) for use in the urbanized area. The Federal Transit Administration funds projects such as New Start rail and BRT, as well as major capital facilities such as administrative buildings or maintenance facilities with formula and/or discretionary program dollars allocated on an annual basis. As mentioned, MAP-21 made changes to and reductions in transit discretionary programs. Therefore in
order to plan for a transit “New Start” in the LRTP, the MPO must assume they will be successful in competing for discretionary FTA New Starts program dollars. A reasonable funding mix might be to assume 50% FTA/25% Local/25% State funding, as is currently the norm in Florida. Also, MAP-21 greatly expands the use of TIFIA loans. Grantees may be proposing use of a TIFIA loan or other loan to help bridge the gap in capital financing for a New Start which in some cases for large projects in multiple phases may take up to five years to design and build (per phase). With regard to the planning of a major capital transit facility other than a New Start, the assumption must be made that FTA program funds such as “State of Good Repair” or “Bus and Bus Facilities” will be awarded to the transit system based on formula. As mentioned, large discretionary awards will be fewer under MAP-21. In most cases, a likely funding mix for State of Good Repair or Bus and Bus Facilities might be 80% FTA/20% local, or up to 100% FTA matched with toll revenue credits.

**Transit Facility:** The transit grantee may propose a specific transit maintenance facility, transfer facility, multi-modal station, park and ride lot with transit service or other transit facility for rehabilitation, renovation or new construction. Generally, such facility improvements remain eligible for FTA 5307, 5309, 5337 (new State of Good Repair formula program), 5339 (new bus and bus facility formula program) funds from FTA, or for FLEX funds from FHWA flexed to FTA for the transit use by the transit grantee. At a minimum, such facilities should be contained within the TIP, STIP and be “consistent with” the LRTP. For example, consistent with the LRTP might mean a general statement, paragraph, line item or section on the specific facilities and their general location if known. Inclusion might also mention feasibility studies, preliminary engineering, appraisals, final design, property acquisition and relocation (if any) and NEPA documents and perhaps the intent to seek local, state or federal funding for same. The award of such funds may require an LRTP amendment to show such funds in the constrained LRTP.

**Transit Service including Fixed Route Bus, Deviated Route, Para-transit, Enhanced or Express Bus:** The transit grantee may propose a specific new transit service for a new area or corridor. Generally, such new service is eligible for 5307 or 5310 funds from FTA, or for L230 FLEX funds from FHWA to the transit grantee. At a minimum, such new service should be “consistent with” the LRTP. For example, consistent with the LRTP might mean a general statement, paragraph, line item or section on the specific service improvements to be undertaken (and the general location if known). Inclusion
might also mention feasibility studies, operational plans, strategic plans and perhaps the intent to seek local, state or federal funding for same. The award of such funds may require an LRTP amendment to show such funds.

_Transit Service Including Bus Rapid Transit (BRT), Light Rail Transit (LRT) Heavy Rail Transit (HRT), Commuter Rail Transit (CRT), Streetcar through the New Starts/Small Starts Program:_

The transit grantee may propose a specific new fixed guideway transit service (like BRT, LRT, HRT, CRT or Streetcar) to serve a new area or corridor as part of FTA’s New Starts/Small Starts or Core Capacity Program. Generally, such new service is eligible for 5307 or 5309 funds from FTA, or for FLEX funds from FHWA to the transit grantee. At a minimum, such new service should be “consistent with” the LRTP. As such service may be a large capital expenditure, the project, termini and cost would need to be specified in the constrained LRTP. Inclusion might also mention feasibility studies, NEPA studies, preliminary engineering and final design, right of way acquisition, operational plans, modeling improvements, strategic plans and perhaps the intent to seek local, state or federal funding for same. The award of such funds would require an LRTP amendment to show such funds in the constrained LRTP

_Emerging Issues_

This section describes topics that may not currently be required by federal laws and rules to be addressed in LRTPs. As such, MPOs are not required to include these considerations in their current planning processes and plans. However, these issues are receiving considerable attention in discussions related to the passage of Moving Ahead for Progress in the 21st Century (MAP21). Each MPO has the discretion to determine whether or not to address these topics in their LRTP at this time, and the appropriate level of detail. Depending upon when MAP-21 implementing guidance is released, the new requirements may have to be addressed within a short timeframe. So beginning to address these issues early on may potentially minimize the level of effort needed to achieve future compliance.
Safety and Transit Asset Management: MAP-21 also includes significant additions to safety planning and transit asset management on the part of transit grantees and the states. Federal Register guidance is expected on transit safety and transit asset management within the near future.

Performance Measurement: FHWA and FTA encourage the MPOs to consider ways to incorporate performance measures/metrics for system-wide operation, as well as more localized measures/metrics into their LRTPs. As funding for transportation capacity projects becomes more limited, increasing emphasis will be placed on maximizing the efficiency and effectiveness of our current transportation system. Consequently, measures to assess the LRTP’s effectiveness in increasing system performance will be needed. Per the recent passage of MAP-21, USDOT will establish performance measures in consultation with State DOTs, MPOs and other stakeholders within 18 months of MAP-21’s enactment. Once performance measures are identified, the States will have up to one year to set state level targets. Once state level targets have been set, MPOs will have up to six-month to set local level targets that support the state targets. The process and schedule for performance measure implementation and LRTP documentation is expected to evolve over the next two years.

Freight: The planning process is required to address the eight planning factors as described in 23 CFR 450.306(a). The degree to which each factor is addressed will vary depending upon the unique conditions of the MPO areas, but efforts should be made to think through and carefully consider how to address each factor. The importance of freight to the nation’s economic wellbeing and global competitiveness, as well as its support and promotion of job creation and retention has heightened its status at the national and regional level. MPOs should be aware that discussions in MAP-21 have largely included a reference to the increasing importance of freight, including the development of Statewide Freight Plans. While this is part of one of the eight planning factors, special emphasis should be given to the freight factor, as it is anticipated to play a more prominent role in future planning requirements.

Sustainable Transportation and Context Sensitive Solutions: The MPOs are encouraged to identify and suggest contextual solutions for appropriate transportation corridors. For example, Context Sensitive Solutions (CSS) may be appropriate for historic parkways, historic districts, town centers,
dense “walkable” neighborhood areas, arterial “gateways”, greenway trails and pedestrian ways, environmentally sensitive areas or simply where right of way is not readily available. Under MAP-21, Transportation Alternatives like bicycle and pedestrian improvements and trails remain eligible under the formula programs while transportation enhancement set-asides have been removed and some uses like historic building renovation and scenic easements may be more restrictive. The value of the resources present may suggest the need for alternative or special treatments (or even accepting a level of congestion and lower speeds that respects the resources). In these instances, specific livability principles adopted by the MPO might be employed for improved pedestrian and transit access – especially to schools and even traffic calming. Also, spatial relationships that support public transit like transit oriented development and the “trip not taken” while reducing greenhouse gases might be recognized as characteristics of a town center or mixed use area with public transit access. Other livability planning goals might also need to be recognized like preserving affordable housing, improving/preserving special resources like parks, monuments and tourism areas, increasing floor area ratios and reducing parking minimums in select corridors to encourage walking trips and public transit, transportation demand management, etc.

Proactive Improvements

This section describes topics that are not currently required by federal laws and rules to be addressed in LRTPs. As such, MPOs are not required to include these considerations in their current planning processes and plans. These areas are intended to be a proactive change in the LRTPs to help Florida continue to make positive strides in long range planning.

**Linking Planning and NEPA:** For highway projects, we are continually looking for strategies that improve the linkage between planning and environmental processes. For the inclusion of regionally significant projects in the Cost Feasible Plan of the LRTP, MPOs should strongly consider including a purpose and need statement for the project in the LRTP. This purpose and need statement will be carried into the National Environmental Policy Act (NEPA) process and will be one way to enhance the linkage between planning and NEPA. For example, this purpose and need statement could briefly provide the rationale as to why the project warranted inclusion in the LRTP. (450.324 (d); 450
Appendix A to Part 450, Section II Substantive Issues, 8) Climate Change: MPOs may also wish to give consideration to climate change and strategies which minimize impacts from the transportation system. FHWA supports and recognizes the importance of exploring the effects of climate change on transportation, as well as the limited environmental resources and fuel alternatives. State legislation now encourages each MPO to consider strategies that integrate transportation and land use planning in their LRTP to provide for sustainable development and reduce greenhouse gas emissions, as well as include energy considerations in all state, regional and local planning. As a result, MPO LRTP Updates are encouraged to include discussions and strategies aimed at addressing this issue.

Scenario Planning: Pursuant to MAP-21, MPOs may elect to develop multiple scenarios for consideration in the development of the LRTP. If the MPO chooses to develop these scenarios, it is encouraged to consider a number of factors including potential regional investment strategies, assumed distribution of population and employment, a scenario that maintains baseline conditions for identified performance measures, revenue constrained scenarios, and estimated costs and potential revenue available to support each scenario.