

SCOPE OF SERVICES
FLORIDA-ALABAMA 2040 LONG RANGE TRANSPORTATION PLAN (LRTP) UPDATE

I. BACKGROUND

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

FEDERAL AND STATE REQUIREMENTS

Federal and state statutes outline the general requirements for long range transportation plan updates and are incorporated in this Scope of Services. These outlines are broadly defined at the federal and state level by the following:

1. Federal Act - Moving Ahead for Progress in the 21st Century Act (MAP-21);
2. 23 Code of Federal Regulations 450.316 and 450.322;
3. Section 339.175, Florida Statutes; and
4. Florida Department of Transportation *Metropolitan Planning Organization Program Management Handbook*.

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. The LRTP shall support the economic vitality of the metropolitan area, especially by enabling global competitiveness, productivity and efficiency;
- B. The LRTP shall increase the safety of the transportation system for motorized and nonmotorized users;
- C. The LRTP shall increase the security of the transportation system for motorized and nonmotorized users;
- D. The LRTP shall increase the accessibility and mobility of people and for freight;
- E. The LRTP shall protect and enhance the environment, promote energy conservation, improve the quality of life and promote consistency between transportation improvements and State and local planned growth and economic development patterns;
- F. The LRTP shall enhance the integration and connectivity of the transportation system, across and between modes, for people and freight;
- G. The LRTP shall promote efficient system management and operation; and
- H. Emphasize the preservation of the existing transportation system.

Requirements for the LRTP under 23 CFR 450.322(f)

The metropolitan transportation plan shall, at a minimum, include:

1. The projected transportation demand of persons and goods in the metropolitan planning area through 2040;
2. Existing and proposed transportation facilities (including major roadways, transit, multimodal and intermodal facilities, pedestrian walkways and bicycle facilities, and intermodal connectors) that should function as an integrated metropolitan transportation system, giving emphasis to those facilities that serve important national and regional transportation functions over the period of the transportation plan. In addition, the locally preferred alternative selected from an Alternatives Analysis under the FTA's Capital Investment Grant program (49 U.S.C. 5309 and 49 CFR part 611) must be adopted as part of the metropolitan transportation plan as a condition for funding under 49 U.S.C. 5309;
3. 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;
4. Consideration of the results of the congestion management process in Transportation Management Areas (TMAs) that meet the requirements of this subpart, including the identification of Single Occupant Vehicles (SOV) projects that result from a congestion management process in TMAs that are nonattainment for ozone or carbon monoxide;
5. Assessment of capital investment and other strategies to preserve the existing and projected future metropolitan transportation infrastructure and provide for multimodal capacity increases based on regional priorities and needs. The metropolitan transportation plan may consider projects and strategies that address areas or corridors where current or projected congestion threatens the efficient functioning of key elements of the metropolitan area's transportation system;
6. All proposed improvements shall be described in sufficient detail to develop cost estimates;
7. A discussion of 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 metropolitan transportation plan. The discussion may focus on policies, programs, or strategies, rather than projects. The discussion shall be developed in consultation with Federal, State, and Tribal land management, wildlife, and regulatory agencies. The MPO may establish reasonable timeframes for performing this consultation;

8. Pedestrian walkway and bicycle transportation facilities in accordance with 23 U.S.C. 217(g);
9. Transportation and transit alternative activities, as appropriate; and
10. A financial plan that demonstrates how the adopted transportation plan can be implemented.

Schedule

The anticipated schedule for the 2040 LRTP Update is 21 months (assuming a March 2014 notice to proceed). Based on FHWA guidelines the Cost Feasible Plan element of the 2040 LRTP must be adopted by the **TPO Board** no later than November 2015. Below is a general schedule for the completion of the 2040 LRTP Update. Attachment A presents a more detailed schedule. It should be noted that the schedule is subject to change based on TPO Board action, public meeting schedules, meeting room availability and unforeseen issues that cause delay.

2040 LRTP Update – Proposed Schedule

Activity	2014	2015
Approved Scope of Services	February	
Consultant Notice To Proceed	February/March	
Development of Socio-Economic Data*	October-December	January-March
Congestion Management Plan	August-December	January-February
Goals and Objectives	April-August	
Public Workshop #1	July/August	
Evaluation Criteria	August-December	
Financial Resources		January-April
Public Workshop #2		January-February
Needs Plan Development	August-December	January-March
Public Workshop #3		August-September
Cost Feasible Plan Development		March-November
Documentation	Continuous	

This schedule is subject to change

**Socio-Economic Data is being developed under a separate contract managed by the Florida DOT*

Work Tasks

In order to address the federal and state requirements for the Florida-Alabama 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 portions of Escambia County, including Pensacola and the coastal communities of Pensacola Beach and Perdido Key, sections of Santa Rosa County including Milton, Gulf Breeze and Navarre, and in Baldwin County, Alabama, the unincorporated community of Lillian and the City of Orange Beach. 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 Participation

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 Florida-Alabama Transportation Planning Organization (TPO).

The TPO has developed 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 promoting the public workshops. This will included the following publications: The Pensacola News Journal, Gulf Breeze News, Santa Rosa Press Gazette, as well as news publications serving the Navarre Beach area, Orange Beach and Lillian Alabama.
- Schedule radio spots 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 Pensacola News Journal
- 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), Technical Coordinating Committee (TCC), Bicycle Advisory Committee (BPAC) and Transportation Planning Organization (TPO) for the Pensacola, Florida-Alabama Urbanized Area, including representatives of the Florida and Alabama Departments of Transportation.
- 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 hearing;
- 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 hearing.

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 Florida-Alabama TPO Language Assistance Plan.

L RTP Steering Committee

A L RTP Steering Committee will be established for the purpose of providing direction and oversight of the development of the 2040 L RTP. This committee will be made up of members from the Citizens Advisory Committee (CAC), the Bicycle/Pedestrian Advisory Committee (BPAC) and the Technical Coordination Committee (TCC). The Steering Committee will meet often (in some cases, once a month) to review elements of the L RTP 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 L RTP. 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.

DELIVERABLE

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, ALDOT** 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 are 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.

Escambia County Transit (ECAT) provides a fixed-route service to Escambia County. The ECAT 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), Alabama Department of Transportation (ALDOT), 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, ALDOT, 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.

DELIVERABLE

The **CONSULTANT** shall prepare a **Goals and Objectives Report**, which summarizes this task. The **TPO, FDOT, ALDOT, 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, CAC, and BPAC.

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.

DELIVERABLE

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

TASK 5: ESTIMATING FINANCIAL RESOURCES

Revenues expected to be available for transportation projects through the Plan horizon year, 2040, will be provided by **FDOT** and **ALDOT**. 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 and ALDOT 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, ALDOT and FHWA/FTA.

Both **FDOT** and **ALDOT** 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.

For estimates of State and Federal Revenues:

- **FDOT** and **ALDOT** will provide Year of Expenditure (YOE) estimates for state capacity programs for individual TPOs, similar to prior forecasts.
- **FDOT** and **ALDOT** will provide system level estimates of the cost of operating and maintaining the State Highway System at the DOT District level. (TPOs 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.

DELIVERABLE

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

TASK 6: NEEDS ASSESSMENT

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.

The assessment of needs will lead to development of the 2040 Needs Plan. The Needs Plan will adhere to the Metropolitan Planning Organization Advisory Council's (MPOAC) criteria for developing "needs" that are realistic, which recognizes that some facilities are constrained or otherwise have environmental or community impacts that make it impractical for them to be expanded.

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.

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.

A maximum of three (3) multi-modal alternative solutions to transportation deficiencies shall be developed. These alternative needs plans shall consider the Vision Statement, Mission Statement, and the Goals and Objectives of this Long Range Transportation Plan Update.

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 **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 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, including ADA504 upgrades and ramp retrofits;
- 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 **CONSULTANT** shall incorporate performance measures/metrics for system-wide operation, as well as more localized measures/metrics into the LRTP. These measures shall assess the effectiveness of the long range transportation plan in increasing system performance. The **CONSULTANT** will obtain approval from the Transportation Planning Organization for all performance measures used in the long range transportation plan.

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. Projects located in Alabama will be adjusted to YOE costs using a 4.0% inflation rate. The 4.0% per annum is used by ALDOT in Alabama for statewide cost projections.

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.

DELIVERABLE

The ***TPO staff*** shall prepare a **Needs Assessment Report**, which summarizes this task. The ***CONSULTANT, FDOT, ALDOT, 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 and Alabama 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.

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.

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.

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 highway projects, FHWA seeks strategies that improve the linkage between planning and environmental processes. During the development of regionally significant projects in a long range transportation plan, the **CONSULTANT** will include a purpose and need for the project in the LRTP. This purpose and need 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, a purpose and need statement could briefly provide the rationale as to why the project warranted inclusion in the long range transportation plan. Prior to FHWA approving an environmental document (Class of Action) - Categorical Exclusion (CE), Environmental Assessment (EA), or Environmental Impact Statement (EIS) and thereby granting location design concept approval, the project must be consistent within the long range transportation plan, 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 long range transportation plan, 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 long range transportation plan and TIP/STIP as well. (450 Appendix A to Part 450, Section II Substantive Issues, 8)

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.

The Cost Feasible Plan shall be adopted by November 10, 2015.

DELIVERABLE

The **TPO** shall prepare a **Cost Feasible Plan Report**, which summarizes this task. The **CONSULTANT, FDOT, ALDOT, 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, the Technical Advisory Committee and the Bicycle/Pedestrian Advisory 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:

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

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 ***FDOT and ALDOT***.

The ***CONSULTANT*** shall prepare monthly Progress Reports to the ***TPO*** for their phase of the work. The ***TPO staff*** will prepare monthly Progress Reports to the ***FDOT and ALDOT*** for the entire project. Progress Reports will document progress in the previous month, problems encountered and solutions found, adherence to schedules, and activities planned 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 staff*** by the **10th day of each month** for their phase of the work. The ***TPO staff*** will provide Progress Reports to the ***FDOT and ALDOT*** by the **20th day of each month**. The ***TPO staff*** and ***CONSULTANT*** will be available to discuss with the ***FDOT and ALDOT*** any issues that are encountered.

IV. PROJECT SCHEDULE AND MANAGEMENT

The ***TPO staff*** shall work closely with the ***FDOT and ALDOT*** 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 staff*** and the ***FDOT and ALDOT*** for approval.

The project schedule 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. The project schedule will specifically show responsibility of the ***CONSULTANT***, the Subconsultant(s), ***TPO***, and of the ***FDOT and ALDOT***. The schedule shall specifically be coordinated with progress reports and billing submittals to the ***TPO***. Attachment A contains a preliminary schedule.

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 **FDOT and ALDOT** and the **TPO staff** 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 staff** on project progress and any problems encountered.

2. Technical Presentations

Technical presentations to the transportation planning committee structure (**TPO, TCC, CAC, and BPAC**) will be made a minimum of eight (8) times (per committee) and maximum of fifteen (15) times (per committee) 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 transportation 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 to the public throughout the development of the Long Range Transportation Plan. Three (3) public workshops are called for in Task 1.

VI. MAJOR RESPONSIBILITIES OF THE DEPARTMENT

The **DEPARTMENT** will:

1. Validate the 2010 Transportation Model using the Regional Model for Florida-Alabama 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

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,
4. Develop a Public Involvement Plan, Evaluation Criteria Report, Needs Assessment Report, and Cost Feasible Report,
5. Provide timely reviews of all material and documents as submitted by the **CONSULTANT** as specified herein,
6. Assist in the development of the Financial Resources,
7. Assist in the development of the Needs Plan,
8. Assist in the development of the Cost Feasible Plan,
9. Assist in the development of the Summary Report,
10. Assist in the development of the Final Report,
11. Develop Transportation Projects Costs,
12. Assist in the development of the Congestion Management Process Plan (CMPP), and
13. Prepare monthly progress reports to the **FDOT and ALDOT**.

VIII. MAJOR RESPONSIBILITIES OF THE CONSULTANT

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. Update 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, PENSACOLA INTERNATIONAL AIRPORT, PORT OF PENSACOLA, AND NORTHWEST FLORIDA TRANSPORTATION CORRIDOR AUTHORITY

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 **PENSACOLA INTERNATIONAL AIRPORT** will:

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

PETER PRINCE FIELD will:

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

The **PORT OF PENSACOLA** 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 INSTLLATIONS** 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, ALDOT, FHWA** and **TPO staff** 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 Staff** 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 #3– EVALUATION CRITERIA (TPO Approval; TCC, CAC, BPAC Review)**
- **TASK REPORT #5– NEEDS ASSESSMENT (TPO Approval; TCC, CAC, BPAC Review)**
- **TASK REPORT #6 – COST FEASIBLE PLAN (TPO Approval; TCC, CAC, BPAC Review)**

The **CONSULTANT** shall prepare the following task reports:

- **TASK REPORT #1 – PUBLIC INVOLVEMENT (TPO Approval; TCC, CAC, BPAC Review)**

- **TASK REPORT #2 – CONGESTION MANAGEMENT PROCESS PLAN (CMPP) (TPO Approval; TCC, CAC, BPAC Review)**
- **TASK REPORT #3 – GOALS AND OBJECTIVES (TPO Approval; TCC, CAC, BPAC Review)**
- **TASK REPORT #4 – FINANCIAL RESOURCES (TPO Approval; TCC, CAC, BPAC 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 and distribute thirty (30) 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.

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 **FDOT and ALDOT** with a progress report each month. The report is required regardless of project status or payment request.

Attachment A

Insert detailed schedule here.