

# Scope of Services

## Northwest Florida Corridor Transportation Authority

### Business Case Analysis and Master Plan Update

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#### Summary

The HDR team understands the challenges faced by the Northwest Florida Transportation Corridor Authority in developing and administering transportation investments in the region. We believe that developing a framework that combines analytics with a consensus based participatory style of decision-making can go far in achieving the necessary buy-in and support from stakeholders at all levels. Our strategy is to work with the Authority in developing and applying such a framework through a business case approach. The key elements of the approach relate to developing a good understanding of the impacts of investments, and an analytical approach to measure and quantify these impacts.

Integrated into the business case analysis, the HDR team will utilize the findings of the analysis to update the 2011 Corridor Master Plan, which will guide the development of the regional transportation network and further identify the improvements needed to serve the mobility needs of northwest Florida. The update will build upon the coordination performed during the business case analysis and will involve coordination with the numerous agencies in the region. The update will focus on building relationships and working with the transportation entities to identify projects that can readily move forward to future phases.

An overview of the activities necessary to carry out the business case analysis and update to the Corridor Master Plan is provided below and described in more detail in the scope of services provided herein. The diagram that follows provides an overview of how the activities will be integrated.

#### Project Management and Administration

This is a continuous activity providing general project oversight including day-to-day project management, team and client coordination, project meetings, correspondence, project reporting, etc.

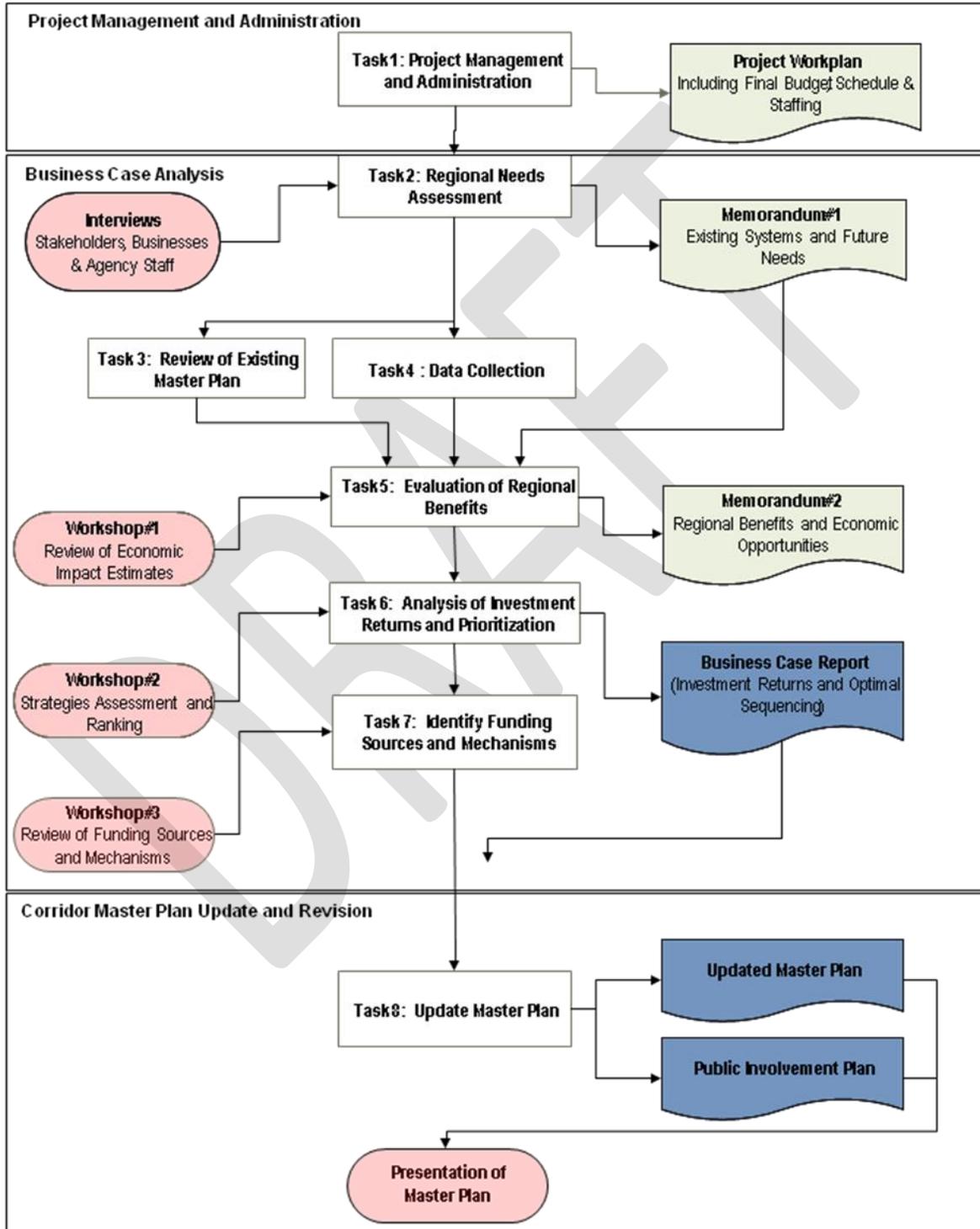
#### Business Case Analysis

The business case analysis is a series of steps aimed at identifying the social and economic challenges of the region (unemployment, stagnant development, lack of infrastructure, etc.) and then assessing how those challenges can be met through investments in the transportation infrastructure. As part of the process, a series of workshops will be integrated to ensure transparency and stakeholder buy-in.

#### Corridor Master Plan Update

The update to the Corridor Master Plan will build upon the findings of the business case analysis and continue the coordination with the agencies in order to achieve stakeholder buy-in on future projects.

The development of the business case and update to the Corridor Master Plan will be developed in accordance with applicable Federal and State of Florida laws including the requirements set forth in the Northwest Florida Transportation Corridor Authority Law and the National Environmental Policy Act. The business case and revised plan will also be developed cooperatively with state, regional, and local agencies as discussed in further detail below.



# Project Management and Administration

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The Consultant will provide the necessary management and administrative services related to the completion of the business case analysis and update to the Corridor Master Plan.

## **Task 1: Project Management and Administration**

This is a continuous activity providing general project administration including coordination, project meetings, correspondence, project reporting, etc. Specific activities include the following:

### **1.1. Project Schedule**

The Consultant will prepare and submit to the Authority a detailed project schedule within two weeks of Notice to Proceed (NTP). This schedule will be updated as needed throughout the project with periodic updates provided at each Authority meeting.

*Deliverable: Project Schedule*

### **1.2. Project Kickoff**

Upon acceptance of the Authority and at the direction of the Authority's Chairman who will issue a formal notice-to-proceed, work will be immediately initiated on this task.

### **1.3. Board Briefings**

The Consultant will have a representative attend each Board meeting (quarterly) to provide updated information and status as to the development of the business case analysis and updated Corridor Master Plan. The Consultant will develop an agenda and meeting minutes for the Board meeting documenting discussions relative to the Corridor Master Plan development.

*Deliverable: Board Meeting Agenda and Minutes*

### **1.4. Progress Reporting**

The Consultant will provide monthly project updates to the Chairman. The monthly progress reports will document those activities completed during the time period of consideration, as well as a forecast of activities to be completed during the next month.

These progress reports will accompany monthly invoices to the Board and serve as support for the work billed for during the period.

*Deliverable: Monthly / Quarterly Progress Reports*

# Business Case Analysis

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The approach for the business case analysis is aimed at enabling the Authority to foster economic development in Northwest Florida through strategic transportation investments. The analytical approach is framed as a business case analysis, and is divided into the tasks outlined below.

## **Task 2: Regional Needs Assessment**

The Consultant will identify key mobility needs for the region in an effort to enhance economic development and improve regional competitiveness. The Consultant will review existing documents to identify the regional baseline conditions in terms of socioeconomic and traffic growth as well as alternative transportation related investments under considerations. One of the key areas of focus during this task will be to also develop a set of regional objectives and priorities to promote and further sustained economic growth in the area.

***Deliverable:** Memorandum detailing the regional mobility needs currently unmet and anticipated in the future and identification of the high level priorities for the region.*

## **Task 3: Review of Existing Master Plan Goals, Objectives and Policies**

A comprehensive review of current Master Plan goals, objective and policies will be conducted in light of changed regional, state and local conditions, legislation, and economic opportunities and benefits. The business case analysis results will be instructive to the updated Master Plan goals, objective and policies. The Master Plan project evaluation criteria and priority ranking matrix developed for the current master plan will be reviewed and updated.

## **Task 4: Data Collection**

The Consultant will perform data collection activities consisting of assembling the planning, engineering, social, economic, and environmental data and information within the US 98 corridor and area influenced by the US 98 corridor and latest version of the Corridor Master Plan. These activities should draw upon the latest existing data as feasible and appropriate and will include the following:

- Obtain TPO Long Range Plan Update documents and modeling files for 4 TPO's in Corridor study area, including Needs Plans and Cost Feasible Plans
- Obtain Local Government Comprehensive Plan Transportation Elements, Capital Improvements Elements, and Identify the Status of Mobility Plan Development in each jurisdiction within each of the 8 counties composing the Corridor study area
- Obtain the most recently adopted Florida Transportation Plan, SIS Plan, and Current Work Program for FDOT District 3
- Obtain Project Support Documents and Priority Lists for Other Transportation Authorities in the Region, including the West Bay Parkway PD&E and the Gulf Coast Parkway project.

- Compile current traffic data for the US98 Corridor and feeder roads throughout the region, and identify additional data collection efforts needed to update the existing deficiencies analysis for the Corridor study area
- Compile current traffic projections for the US98 Corridor and feeder roads throughout the region, and conduct additional traffic and travel characteristics data collection needed to update and extrapolate traffic forecasts and identify future deficiencies for the Corridor study area

#### **4.1. Existing and Future Conditions Analysis**

- Review and conduct comparative analysis of current FDOT plans and programs, Regional Plans, and TPO Long Range Plan Update documents and modeling files for 4 TPO's in Corridor study area, including Needs Plans and Cost Feasible Plans, and TPO Project Priorities. The primary analysis will investigate the interrelationship among plans and relationship to the current Corridor Master Plan priority projects. GIS Mapping will be performed to facilitate the analysis and present the results for Board review and discussion.
- Review and conduct comparative analysis of Local Government Comprehensive Plan Transportation Elements and Capital Improvements Elements, and identify the status of Mobility Plan Development in each jurisdiction within each of the 8 counties composing the Corridor study area. The primary analysis will investigate the interrelationship among plans and relationship to the current Corridor Master Plan Project Priorities. GIS Mapping will be performed to facilitate the analysis and present the results for Board review and discussion.
- Analyze current traffic conditions and levels of service on the US98 Corridor and feeder roads. Identify current roadway deficiencies, safety and hurricane evacuations issues, and regional mobility concerns.
- Analyze future traffic conditions and levels of service on the existing US 98 corridor for a 2040 planning horizon based on currently developed travel demand model growth forecasts. Identify future roadway deficiencies, safety and hurricane evacuation issues, and associated regional mobility concerns.

### **Task 5: Evaluation of Regional Benefits**

The Consultant will identify and describe potential costs and benefits that may reasonably be attributed to the Authority's transportation investments. Through this task, the Consultant will identify benefits in five different benefit categories including: 1) state of good repair; 2) economic competitiveness; 3) livability; 4) environmental sustainability; and 5) safety. In addition, The Consultant will determine whether the identified costs and benefits can be quantified and whether they can be "monetized", i.e. measured in dollar terms. The Consultant will also comment on the expected magnitude of each cost and benefit metric and/or ratio.

**Deliverable:** A memorandum detailing the benefit categories and an estimate of the social benefits generated by the Authority's transportation investments.

### **5.1. Consensus Building Workshops**

The Consultant will convene a series of workshops involving key stakeholders in the region during the process of developing the business case. The Consultant will use its proprietary Risk Analysis Process (RAP©) approach which is aimed at bringing in transparency into the analytical underpinnings of social decision, helping drive collaboration and consensus-based decision making. During the workshops, the Consultant will discuss the strategic and analytical approaches in detail, and review the key parameters and assumptions that impact the analysis. In addition, the Consultant will extract the local expertise and knowledge that form key inputs into the framework. The key stakeholders will include but will not be limited to the following:

- Representatives of local government agencies
- Experts with local knowledge on land use, socio-economics, transportation and industry
- Representatives from local chambers of commerce and other industry organizations

Prior to each workshop, the Consultant will develop a list of individuals to be included in the workshop and will develop a guide book and plan to be distributed in advance to the participants. Three separate workshops are envisioned:

- Workshop 1: Review of regional needs and assumptions that drive estimates of regional benefits
- Workshop 2: Discussion and review of parameters that guide prioritization of investments
- Workshop 3: Review of alternative funding sources and funding mechanisms.

**Deliverable:** Three (3) Stakeholder Workshops

## **Task 6: Analysis of Investment Returns and Prioritization**

On the basis of the data collected during the workshop and previous tasks, the Consultant will develop and implement the cost-benefit analysis framework, and identify the viability of the Authority's transportation investments from a social return standpoint. The benefits will be classified into the benefits accrued to the users and specific stakeholders, as well as to the general public. The Consultant will develop a comparative analysis of the discounted stream of these benefits against the investment in order to generate the benefit-cost metrics that determine the overall viability of the initiative. The framework can then effectively determine the relative benefits of specific components, and can guide the decisions on specific investments to be made and the best timing for these investments. This approach for prioritization and sequencing can lead to maximizing the return on investment in infrastructure.

**Deliverable:** A technical memorandum detailing the results of the cost-benefit analysis, including an overview of the key assumptions and parameters of the model.

## **6.1. Develop Final Business Case Report**

The Consultant will synthesize the study results and prepare a final report that will be submitted to the Authority. The Consultant will also assist the Authority in presenting the results of the study to the transportation agencies and other project stakeholders. This report will form the basis for updating the Corridor master Plan

***Deliverable:** A final report of the business case analysis conclusions*

## **Task 7: Identify Funding Sources and Mechanisms**

Once the project analysis is completed, and a viable project value is determined, the Consultant will work with the Authority and stakeholders to identify alternative funding strategies, and assess potential delivery models. The principal funding for the project may be from one or a combination of sources. The Consultant will explore the use of traditional funding sources (federal support, Federal grants, State transportation funds, funding based on revenue sources and tax and fee alternatives), as well as innovative funding models (tolling, PFI and credit support options, etc.).

***Deliverable:** A technical memorandum detailing the alternative funding sources and mechanisms, and the key implications of each alternative.*

# Corridor Master Plan Update

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The current Corridor Master Plan was developed in 2005 and was based on analysis of existing and projected future conditions along US 98 at that time, and in consideration of then-adopted TPO and other authority and local government transportation plans. Traffic conditions along the US 98 corridor have changed, other regional transportation plans have been adopted, and economic opportunities have evolved. A Master Plan Update is required annually; however, a comprehensive update of changed conditions has not been completed since the Master Plan was initially developed.

## **Task 8: Corridor Master Plan Update**

The plan update process will build upon the findings and recommendations of the business case analysis. An extensive collaboration effort with transportation planning entities and stakeholders regarding the Corridor Master Plan Update will take place in addition to the following activities.

### **8.1. Public Involvement Outreach**

Recognizing the importance of public involvement and outreach during the planning process, the Consultant will communicate with the public and local agencies as part of the Master Plan update process. The Consultant will accomplish this collaboration with local partners and stakeholders by performing the following activities.

#### **Public Involvement Plan**

A Public Involvement Plan (PIP) will be executed for the project to insure critical information is disseminated to affected agencies, governmental entities, and the public in a manner as to provide for maximum input and involvement in the development of the updated Master Plan. The PIP will be designed to provide a variety of methods to address the diverse interests and concerns of the various community and development areas involved, groups within those areas, property owners along the corridor, and the public at large. The goal of this plan will be to communicate effectively the Authority's desire to consider all the transportation needs within the corridor and to identify improvements, which accommodate those needs.

***Deliverable:** Public Involvement Plan*

#### **Transportation Agency and Governmental Coordination**

Presentation of information to interested governmental agencies, entities, and officials about the development of the updated Corridor Master Plan will be undertaken. Presentations will be arranged and scheduled by the Consultant as approved by the Board. Input received at these presentations will be used to refine both the study process, and the recommendations.

***Deliverable:** PowerPoint Presentation*

### **Resource Agency Coordination**

The Consultant will coordinate with appropriate state and federal resource agencies having jurisdiction over future projects that could result from the Master Plan update. The purpose of this effort will be to explore potential opportunities for regional protection of water quality, wetlands, open space, or other sensitive resources that could be developed through the strategic corridor planning process. The FDOT Efficient Transportation Decision-Making (ETDM) screening process will be considered as a method for early review of projects with short term potential for advancement.

### **General Public Involvement**

The Consultant will conduct up to four (4) noticed public meetings during the update of the Corridor Master Plan. These meetings will be held in locations that maximize the opportunity for any interested persons to attend within the eight county regions. Maps, exhibits, and other graphical materials will be developed to facilitate presentation of the updated Master Plan recommendations and afford opportunity for dialogue between the public, the Authority, and the Consultant. A brief formal presentation will be developed and presented in a continuous run format allowing for an open house format. Comment forms will be provided for those desiring to provide comments at the proceedings.

## **8.2. Present Findings and Update Master Plan**

Using data and information developed in previous tasks, the Consultant will document the conclusions and recommendations in an updated Corridor Master Plan consisting of an appropriate narrative, exhibits, maps, data, costs etc. The Consultant will also develop a summary report that summarizes the conclusions and results of the revised Corridor Master Plan and will make a presentation to the Authority for final approval.

***Deliverable:*** Updated Corridor Master Plan and Summary Report; PowerPoint Presentation