



# MOTOR CARRIER SYSTEM PLAN

## Business Forum 2

April 7, 2016 | Bartow, FL

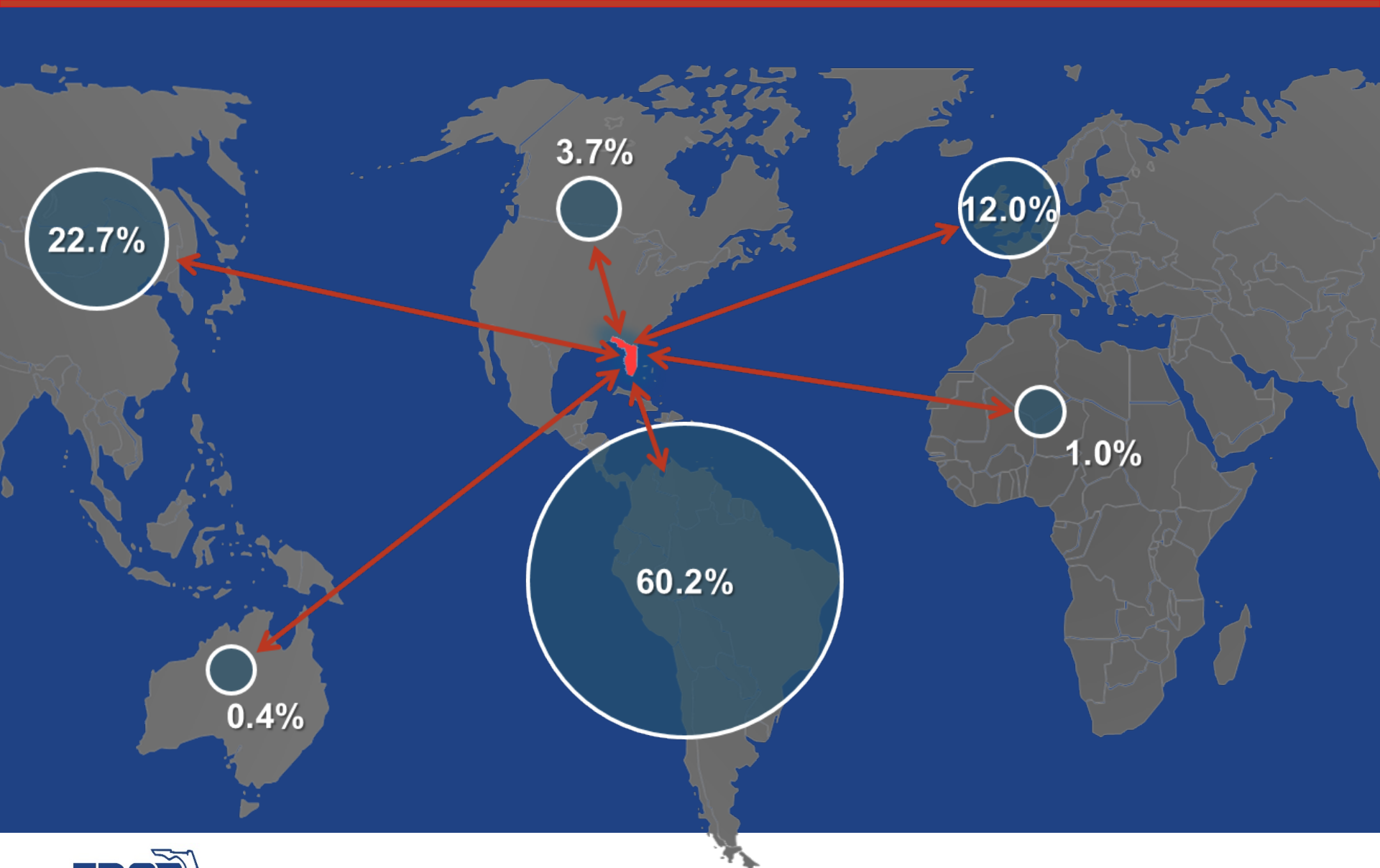


# Welcoming Remarks And Overview





# Florida is a Crossroads of North/South & East/West Trade



# Technology Trends - Freight Vehicles



1900-1950

1980

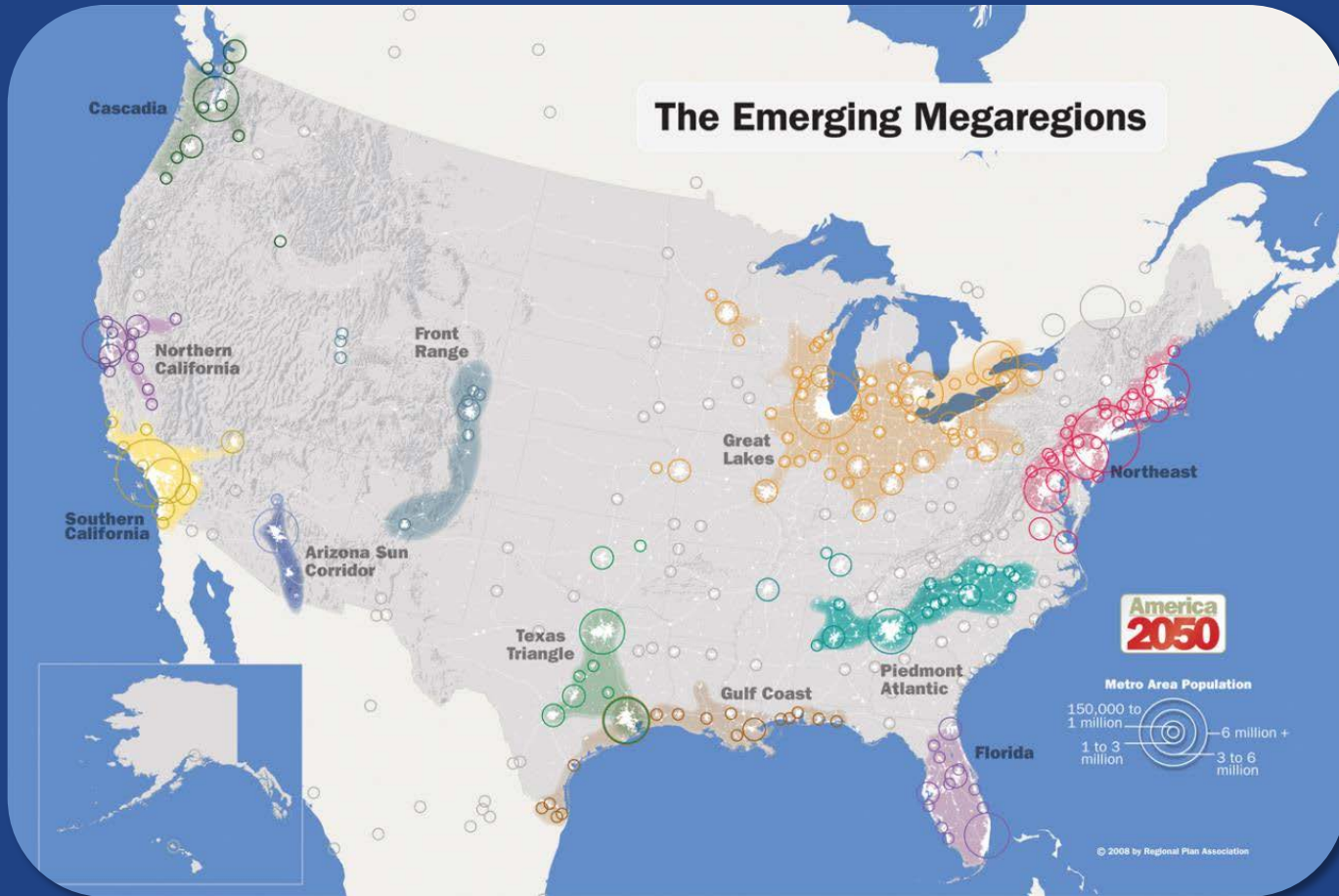
2000

2020

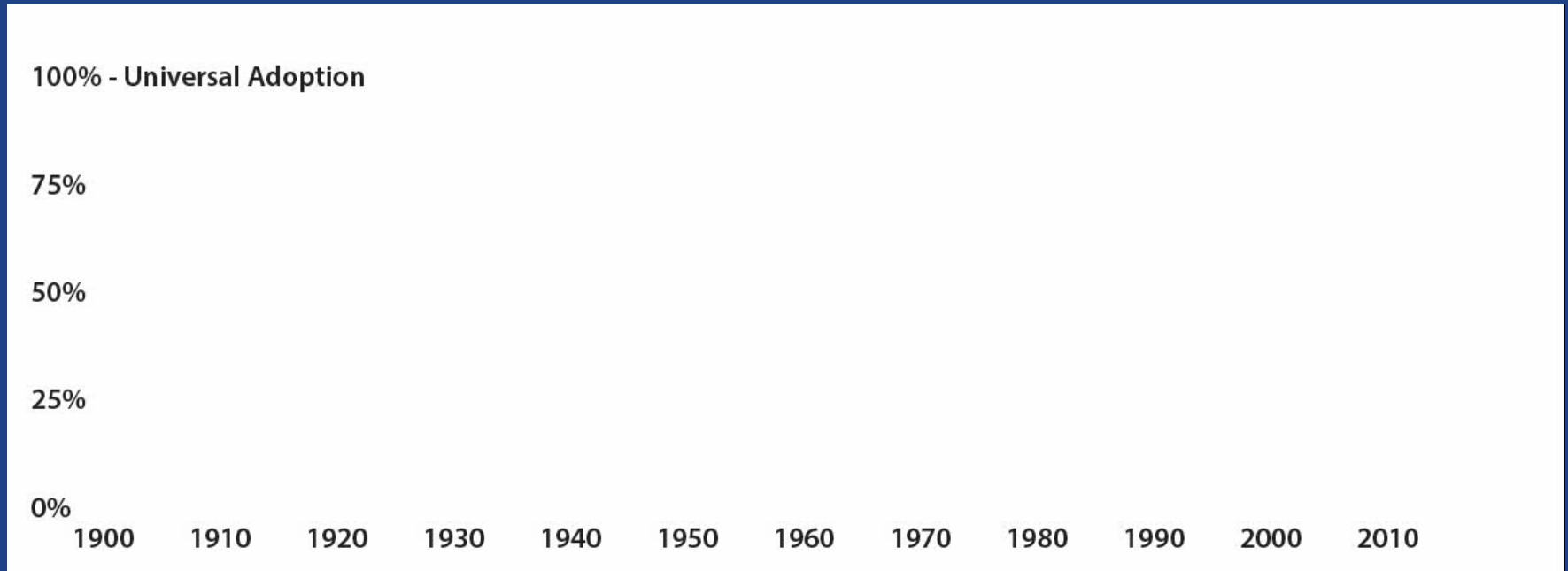
# Florida's Changing Industry Clusters



# Shift to Megaregions



# Changing Technologies



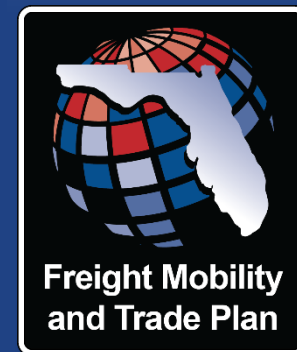
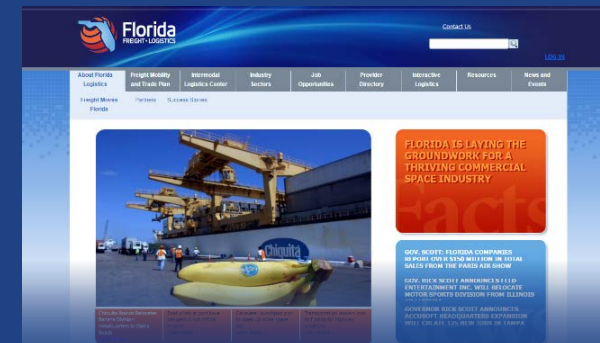
# The Evolution of Transportation

<b>From...</b>	<b>To...</b>
<b>Moving vehicles</b>	<b>Moving people and freight</b>
<b>Individual modes and facilities</b>	<b>Complete end-to-end trip</b>
<b>Individual jurisdictions</b>	<b>Economic regions and trade corridors</b>
<b>Physical capacity</b>	<b>Operational performance, flexibility, and reliability</b>
<b>Travel time and vehicle operating costs</b>	<b>Business logistics and economic competitiveness</b>
<b>Reacting to economic growth and community and environmental impacts</b>	<b>Proactive planning for economic, community and environmental goals</b>

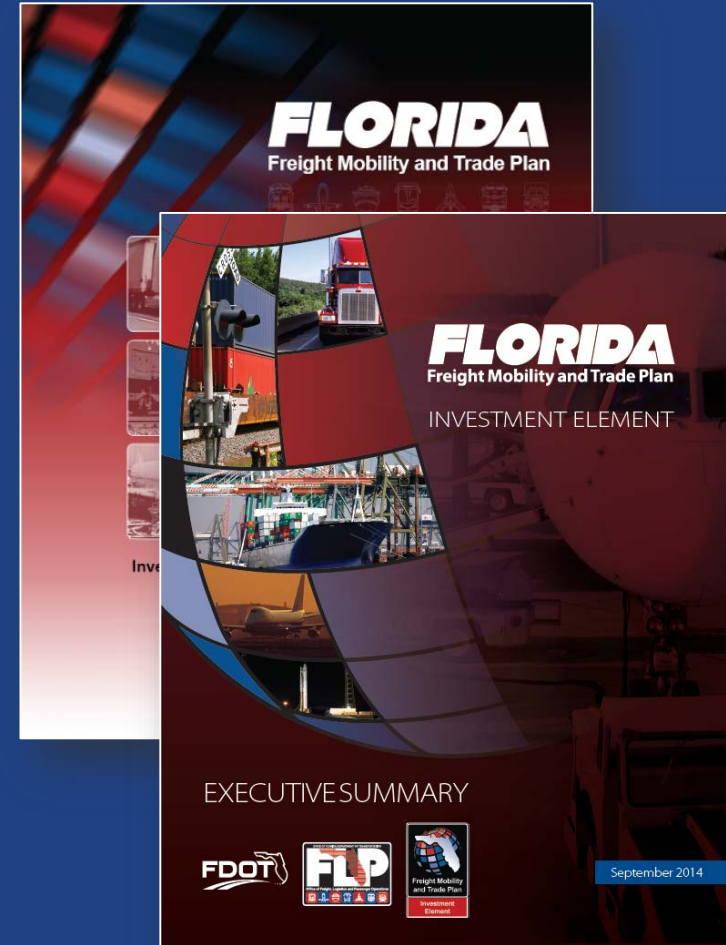
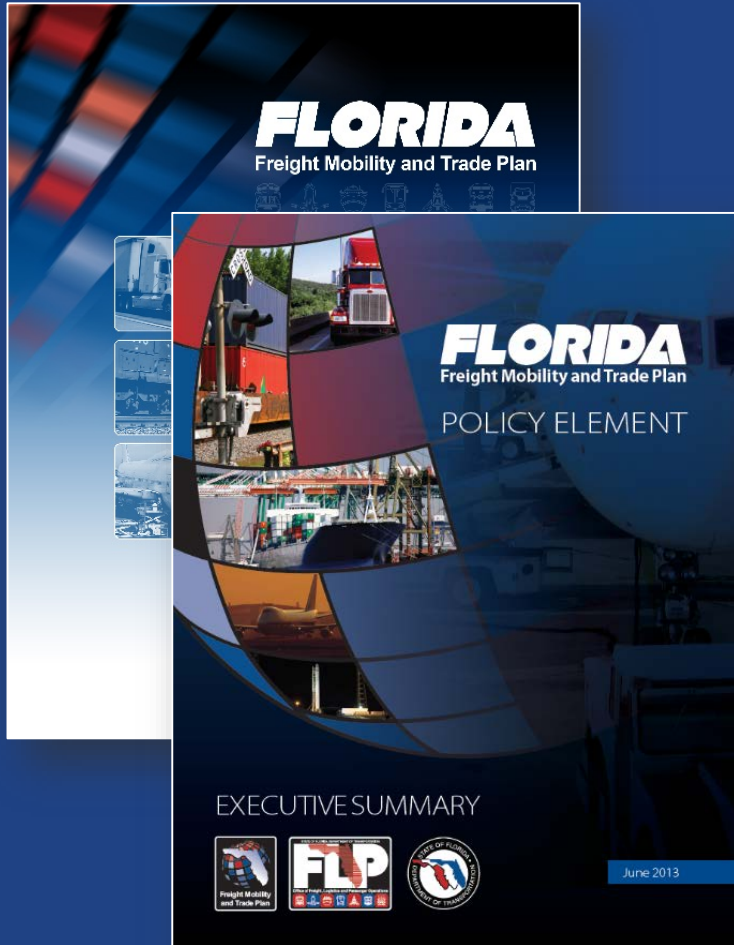


# FDOT's Evolution

- New Freight, Logistics and Passenger Operations Office
- New State Freight, Logistics and Passenger Operations Administrator
- New full-time Freight Coordinators in each FDOT District
- Began several joint efforts with partner agencies
- Developed 1<sup>st</sup> Statewide Freight Plan



# Freight Mobility and Trade Plan Components





# Working Group

- Internal Working Group will act as an informal steering committee to advise the project team
  - Provide expertise in motor carrier concerns that impact their office
  - Review draft materials before they are presented to stakeholders
  - Includes staff from various FDOT offices, as well as partner agencies that impact trucking



# Business Forums

- External Business Forums will allow industry stakeholders to provide additional expertise and input
  - Provide comments on motor carrier concerns that impact you, your company, your region, etc.
  - Review draft materials before they are incorporated into the final Motor Carrier System Plan

# Schedule



# Feedback from Business Forum I: Pensacola

- Escambia County has a local freight plan – how are we integrating that effort?
- Focus has been on infrastructure projects because we can't address most of these issues
- Are there any truck routes associated with SIS?
- Promoting the industry may be an issue that is missing, and different skills are required today
- Is there a way to create programs for truck drivers that pair them with experienced drivers?
- Military drivers are well trained, but logging and regulations are different for private
- Can we co-locate weigh-in-motion, produce checks, and truck parking?

# Summary Of Identified Motor Carrier Issues

- Hours of Service
- Compliance, Safety, Accountability (CSA)
- Driver Shortage
- Driver Retention
- Truck Parking
- ELD Mandate
- Driver Health/Wellness
- Economy
- Infrastructure/  
Congestion/ Funding
- Driver Distraction
- Empty Backhaul
- Alternative Fuels
- Regulatory Consistency/  
Harmonization with  
Neighboring States
- Truck Size and Weight
- Technology  
Implementation
- Last Mile Connectivity
- Data



# FMSCP Critical Issues Survey Results

(As of 4/3/16)

**36 Respondents (representing 68 perspectives)**

<b>State Agency (e.g. FDOT, FDACS)</b>	<b>9</b>	<b>Seaport</b>	<b>3</b>
<b>MPO</b>	<b>8</b>	<b>Association-Private</b>	<b>3</b>
<b>Economic Development Council</b>	<b>2</b>	<b>University Research Center</b>	<b>3</b>
<b>Local Government</b>	<b>3</b>	<b>Airport</b>	<b>1</b>
<b>Carrier</b>	<b>5</b>	<b>Non-Profit Environmental Adv.</b>	<b>1</b>
<b>Transporter</b>	<b>4</b>	<b>Rail</b>	<b>1</b>
<b>Shipper</b>	<b>4</b>	<b>Truck-Independent Operator</b>	<b>1</b>
<b>Receiver</b>	<b>3</b>	<b>Association-Public</b>	<b>1</b>
<b>Truck-Fleet Operator</b>	<b>4</b>	<b>Private Utilities</b>	<b>0</b>
<b>Fleet Operator</b>	<b>4</b>	<b>Regional Planning Council (RPC)</b>	<b>0</b>
<b>Distribution Center</b>	<b>4</b>	<b>Public Utilities</b>	<b>0</b>
<b>Other</b>	<b>4</b>	<b>Colleges and Universities</b>	<b>0</b>

# FMSCP Critical Issues Survey Results

## National Issues *(ratings range from 3.9 – 2.9)*

- **Infrastructure/Congestion/Funding (3.9)**
- **Economy (3.7)**
- **Compliance, Safety, Accountability (3.4)**
- **Truck Parking (3.4)**
- **Hours of Service (3.4)**
- **Driver Health and Wellness (3.3)**
- **Driver Distraction (3.3)**
- **Driver Shortage (3.2)**
- **Driver Retention (2.9)**
- **Electronic Logging Device (2.9)**

# FMSCP Critical Issues Survey Results

State Issues *(ratings range from 3.6 – 3.0)*

- **Technology Implementation (3.6)**
- **Regulatory Consistency/Harmonization: (3.3)**
- **Truck Size and Weight (3.3)**
- **Data production and availability (3.3)**
- **Last Mile/Short Haul Connectivity: the final segments of freight movement (3.2)**
- **Empty Backhaul (3.1)**
- **Alternative Fuels (3.0)**

# FMSCP Critical Issues Survey Results

## Other Issues?

- From State Agency responses (e.g. FDOT, FDACS)
  - **Domestic Security and Criminal** - *tracking to prevent cargo theft, human trafficking, insurance fraud and use as a weapon.*
  - **The Department's Complete Streets Initiative** - *ensure freight needs and compatibility are addressed.*
  - Need for **Truck Only Lanes** *as motorized travel evolves.*



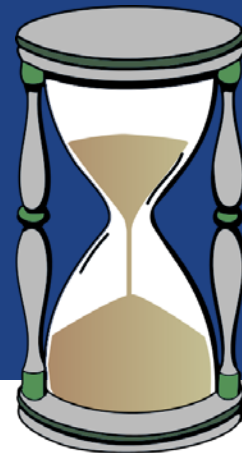
# FMSCP Critical Issues Survey Results

## Next Steps

- *How can we expand the # of responses from diverse perspectives?*
- Survey in your agenda packets
- Online until end of April

# Hours Of Service

- Ranked as **top industry issue for 3 years in a row**
- Significant negative impacts on the industry from the 34-hour restart provisions first implemented in July 2013 have been documented by numerous sources
- **80% of motor carriers** indicated a loss of productivity directly attributable to the now-suspended rules, and driver pay impacts were estimated to range from \$1.6 billion to \$3.9 billion annually



# Compliance, Safety, Accountability (CSA)

- There is general agreement among motor carriers and enforcement personnel that **crash accountability should be a component** of the CSA Crash BASIC, however there is continued debate over the use of police accident reports (PARs) for determining crash responsibility



# Driver Shortage

- The current driver shortage is now estimated to be **48,000**, a number that is projected to increase to 175,000 by 2024
- 45% of driver hires are done to **replace retirees**
- Federal rules require individuals to be 21 years old to obtain a Commercial Drivers License (CDL), which can limit options for young individuals aged 18-20 who are interested in becoming truck drivers



# Driver Retention

- The industry experiences turnover rates **significantly higher** than many other sectors of the U.S. workforce, creating additional costs for motor carriers in recruitment and training



# Truck Parking

- The growing scarcity of available truck parking **creates a dangerous situation** for truck drivers who are often forced to drive beyond allowable HOS rules or park in undesignated and, in many cases, unsafe locations
- FHWA recently released its *Jason's Law Truck Parking Survey Results and Comparative Analysis* which confirmed that truck parking continues to be a major issue in the United States



# Electronic Logging Device (ELD) Mandate

- An electronic logging device — or ELD — is used to **electronically record a driver's Record of Duty Status** (RODS), which replaces the paper logbook some drivers currently use to record their compliance with Hours of Service (HOS) requirements
- In March 2014, FMCSA issued a Supplemental Notice of Proposed Rulemaking (SNPR) to address a number of concerns in the initial Electronic Logging Device (ELD) proposed rule





# Driver Health/Wellness

- Many in the industry recognize the critical connection between improved driver health and wellness and the industry's ability to **retain qualified drivers**
- Improvement in driver health may also have positive implications for industry safety as research has identified a **positive correlation between driver health and driver safety**



# Economy

- A longstanding top industry issue during the years of the Great Recession
- Recent concerns over **softer freight demand** and what that may mean for 2016, as well as concerns over the economies in Europe and Asia and export impacts from a strong U.S. dollar



# Transportation/Infrastructure/ Congestion/Funding

- The United States' 4.1 million miles of public roadways must be **properly maintained and improved** to allow the industry to efficiently deliver the nation's goods
- The negative impacts of congestion, failing infrastructure and the need for a long-term transportation funding solution all combined to keep this issue in the top ten in 2015



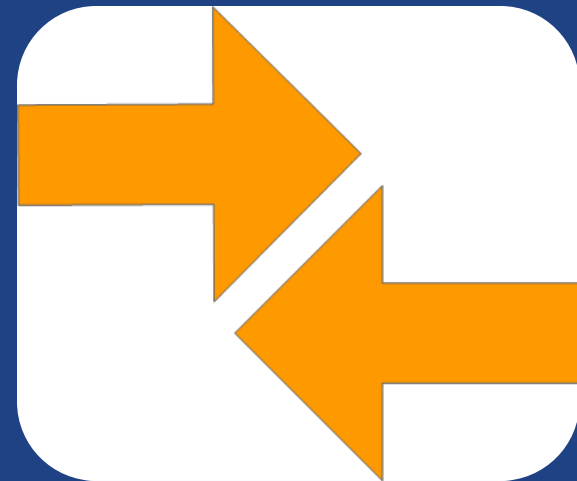
# Driver Distraction

- Increased concern about the **rising use of technology in vehicles** by all drivers will likely result in this issue continuing as a top concern in the coming years



# Empty Backhaul

- The issue of empty backhaul has been associated mostly with Florida trucking and rail; however, it is a concern that impacts all modes.
- The Florida Chamber Foundation's 2010 Trade and Logistics study identified an **imbalance of trade flows** as one of five challenges facing Florida.



# Alternative Fuels

- FDOT wants to support and facilitate the deployment of Compressed Natural Gas (CNG)/Liquid Natural Gas (LNG) use for **hub logistics and long-haul trucking** in collaboration with the Florida Department of Agriculture and Consumer Services (DACCS)



# Regulatory Consistency/ Harmonization with Neighboring States

- Need to identify potential barriers to competition due to **inconsistency in regulations**
- Can lead to loopholes and unnecessary delays when regulations don't match across a single truck route





# Truck Size and Weight

- The permitting of overweight trucks is a complex highway issue which also **impacts other modes**
- Trucks carrying a “non-divisible” load may be issued an overweight permit by a state for weights above the federally mandated 80,000-pound gross vehicle weight (GVW) limit for travel

**OVERSIZE**

# Technology Implementation

- Increased automation, real-time routing, and data analytics could optimize logistics decisions further
- Container ships, air freighters, trucks, and railcars continue to evolve in size, speed, and fuel efficiency
- Breakthroughs that are still ahead, such as self-guided transport vehicles or automated freight shuttles could disrupt current logistics patterns



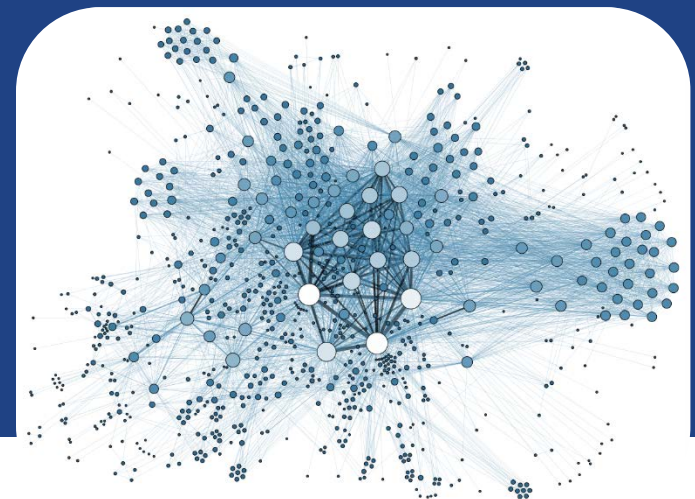
# Last Mile Connectivity

- The last leg of a supply chain is often the least efficient, especially when deliveries occur in urban areas, which can contribute to significant congestion and safety problems
- Planning for efficient goods movement requires a supply chain perspective, and often includes a combination of solutions



# Data

- The production and availability of appropriate data is fundamental to the ability to address a variety of challenges facing the public and private organizations involved in the movement of freight
- The growth of high-speed networks, proliferation of mobile devices, advances in sensors, video and analytics are all trends are creating a dynamic and growing market for ITS



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# Introduction to What Other are Doing Nationally

- What has been the traditional approach for Motor Carrier planning?
  - Legacy View
- What is the future focus for Motor Carrier planning?
  - Mixture of Legacy and Holistic View
- Who is conducting motor carrier planning?
  - There are no other states conducting Motor Carrier Planning – no other states to identify “national best practices” for Florida to emulate
  - There are some early pioneers

# Literature Review: Legacy View

- Focus on infrastructure solutions to support truck movement needs (weight & height), safety (turning radii, etc.)
- Focus on infrastructure solutions to provide for capacity growth and to eliminate bottlenecks
- Focus on regulatory matters: weigh stations, permitting, driver behavior enforcement, etc.
- Some efforts on trucking operational needs: Parking, ITS, information



# Literature Review: Holistic View

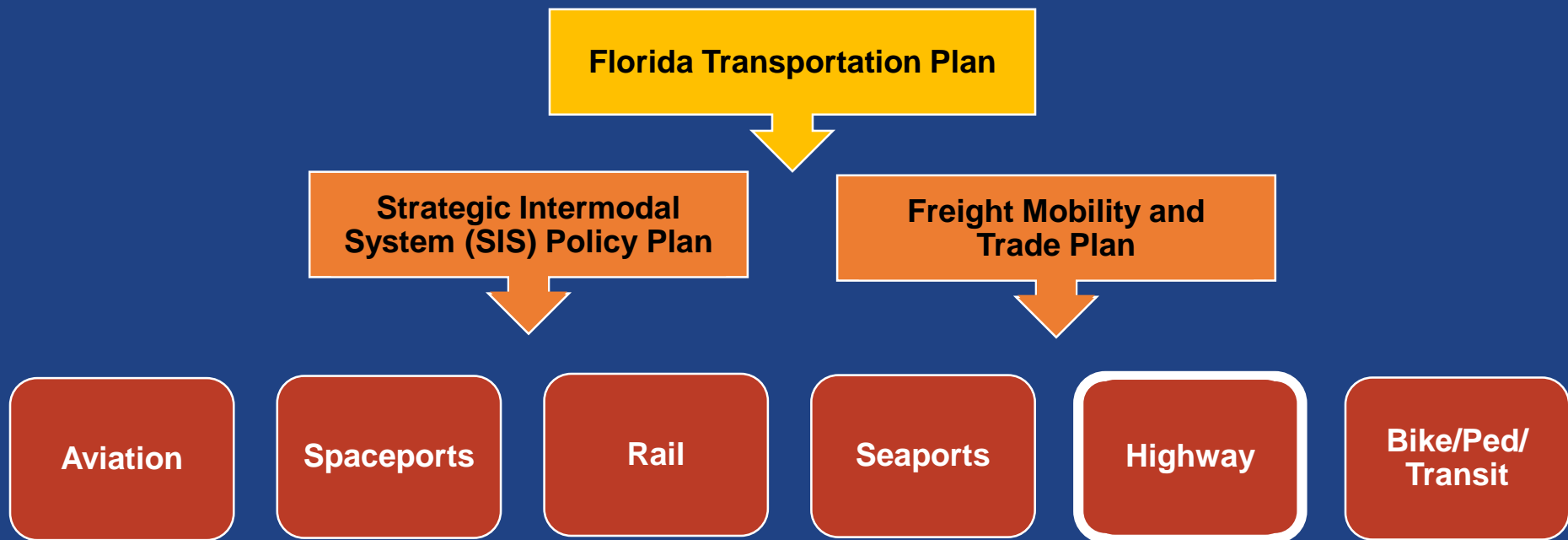
- Trucking as a User & Customer
- Facilitate development of truck route system across the state and within multiple jurisdictions (cities, counties, MPOs)
- Harmonize restrictions (weight limits, speed limits) on corridors across multiple jurisdictions
- Develop less intrusive methods to carrier operating efficiencies (weigh-in-motion, single trip permit across jurisdictions, real-time road condition information)

# Literature Review: Some Early Pioneers

- Illinois Tollway:
  - Commercial Vehicle Strategic Plan
- Atlanta Regional Commission (ARC)
  - Strategic Truck Route Master Plan
- Houston-Galveston Area Council (H-GAC)
  - Truck HazMat Route network
- Delaware Valley Regional Planning Commission (DVRPC), a/k/a Philadelphia MPO
  - Commercial truck route system and intermodal connectors

# Planning at FDOT

- Needed to address transportation issues at a very high level, as well as down to specifics of individual programs and modes of transportation



# FTP Goals

**Safety and Security** for residents, visitors, and businesses



**Agile, Resilient, and Quality** transportation infrastructure



**Efficient and Reliable Mobility** for people and freight



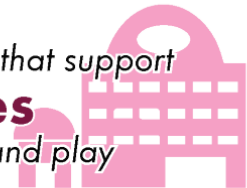
**More Transportation Choices** for people and freight



Transportation solutions that support Florida's global **Economic Competitiveness**



Transportation solutions that support **Quality Places** to live, learn, work, and play



Transportation solutions that enhance Florida's **Environment** and **Conserve Energy**



# FMTP Goals

**Increasing the flow of domestic and international trade through the state's seaports and airports**

**Increasing the development of intermodal logistic centers in the state**

**Increasing the development of manufacturing industries in the state**

**Increasing the implementation of compressed natural gas (CNG), liquefied natural gas (LNG), and propane energy policies**

# FMTP Objectives

- 1** Capitalize on the Freight Transportation Advantages of Florida Through Collaboration on Economic Development, Trade, and Logistics Programs
- 2** Increase Operational Efficiency of Goods Movement
- 3** Minimize Costs in the Supply Chain
- 4** Align Public and Private Efforts for Trade and Logistics
- 5** Raise Awareness and Support for Freight Movement Investments
- 6** Develop a Balanced Transportation Planning and Investment Model That Considers and Integrates All Forms of Transportation
- 7** Transform the FDOT's Organizational Culture to Include Consideration of Supply Chain and Freight Movement Issues

# Consistency Matrix

## Florida Transportation Plan (FTP) Goals and Objectives

Safety

Mobility

Economic

Environment

Quality

Choices

Places

## Freight Mobility and Trade Plan (FMTP) Goals and Objectives

Trade

ILCs

Manufacturing

Alternative Fuels

Motor Carrier System Plan  
Goals and Objectives



# Draft Motor Carrier System Plan Goals

## Safety and Security

Identify and support highway safety and security improvements and coordinate with partners to implement initiatives.

### Example Objectives and Strategies –

- Address safety and security of truck drivers
- Coordinate with the FDOT Safety Office to reduce crashes involving commercial motor vehicles

# Draft Motor Carrier System Plan Goals

## Agile, Resilient, Quality

Continue to invest in quality infrastructure that can be adapted to meet the needs of future freight vehicles and technology.

### Example Objectives and Strategies –

- Maintain existing State Highway System to achieve a state of good repair
- Investigate and evaluate potential impacts of automated vehicles and other technologies on key freight routes
- Collaborate with stakeholders to collect data relevant to motor carrier operations

# Draft Motor Carrier System Plan Goals

## Efficient and Reliable Mobility

Increase operational efficiency of goods movement and maintain reliable mobility for trucks.

### Example Objectives and Strategies –

- Monitor the performance of key freight routes to identify mobility needs
- Continue to work with stakeholders to fund projects consistent with industry priorities

# Draft Motor Carrier System Plan Goals

## Economic Competitiveness

Support Florida's global competitiveness and increase the flow of domestic and international trade.

### Example Objectives and Strategies –

- Raise awareness and support for freight highway and connector projects in coordination with the Department of Economic Opportunity and Enterprise Florida
- Address empty backhaul
- Seek to increase the development of manufacturing industries in the state

# Draft Motor Carrier System Plan Goals

## More Transportation Choices

Increase the number of quality options for moving freight to, from, and within Florida.

### Example Objectives and Strategies –

- Increase seamless connectivity
- Support the development of intermodal logistic centers that meet statewide needs

# Draft Motor Carrier System Plan Goals

## Environment and Conserve Energy

Balance the need for environmental protection and conservation with seeking motor carrier efficiencies.

### Example Objectives and Strategies –

- Investigate and evaluate potential applications for the utilization of alternative fuels.
- Coordinate environmental initiatives with partner offices and agencies.

# Draft Motor Carrier System Plan Goals

## Quality Places

Coordinate early and often with local communities to ensure mobility for trucks that is consistent with regional priorities.

### Example Objectives and Strategies –

- Address the need to educate locals on the connection because freight mobility and access goods.
- Enhance coordination between statewide and local freight planning.
- Continue efforts to address freight movement as part of Complete Streets.





# MOTOR CARRIER SYSTEM PLAN

## Facilitated Discussion



# Facilitated Discussion

- Comment on draft Motor Carrier System Plan Goals, Objectives, and Related Issues
- What's Missing?

# Next Steps

- Motor Carrier Systems Analysis
- Working Group 3
  - Thursday, May 24, 2016
  - Tallahassee
- Business Forum 3
  - Thursday, June 30, 2016
  - Ft. Lauderdale

# Closing Comments

- Questions?



# MOTOR CARRIER SYSTEM PLAN

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