Welcoming Remarks And Overview
Florida is a Crossroads of North/South & East/West Trade

Source: Enterprise Florida, 2014
Florida’s Changing Industry Clusters

- Agriculture
- Construction
- Cleantech
- Life Sciences
- Information Technology
- Financial & Professional Services
- Manufacturing
- Global Trade & Logistics
- Defense & Homeland Security
- Aviation and Aerospace
- Tourism

Source: Florida Department of Economic Opportunity
Shift to Megaregions
Changing Technologies

100% - Universal Adoption

75%

50%

25%

0%

## The Evolution of Transportation

<table>
<thead>
<tr>
<th>From...</th>
<th>To...</th>
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<tbody>
<tr>
<td>Moving vehicles</td>
<td>Moving people and freight</td>
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<tr>
<td>Individual modes and facilities</td>
<td>Complete end-to-end trip</td>
</tr>
<tr>
<td>Individual jurisdictions</td>
<td>Economic regions and trade corridors</td>
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<tr>
<td>Physical capacity</td>
<td>Operational performance, flexibility, and reliability</td>
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<tr>
<td>Travel time and vehicle operating costs</td>
<td>Business logistics and economic competitiveness</td>
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<tr>
<td>Reacting to economic growth and community and environmental impacts</td>
<td>Proactive planning for economic, community and environmental goals</td>
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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 1st Statewide Freight Plan
Why A Motor Carrier System Plan?

- FDOT’s historical approach to Motor Carrier has been in terms of asset protection (compliance and size and weight issues) and safety.
- Want to take that next step to focus on the facilitation of truck movement and identifying key motor carrier policy issues.
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

- **Working Group Meeting #1**: Jan 2016, Pensacola
- **Business Forum #1**: Jan 2016, Pensacola
- **Working Group Meeting #2**: March 2016, Bartow
- **Business Forum #2**: April 2016, Bartow
- **Working Group Meeting #3**: May 2016, Ft. Lauderdale
- **Business Forum #3**: June 2016, Ft. Lauderdale
- **Working Group Meeting #4**: Sept 2016, Jacksonville
- **Business Forum #4**: Oct 2016, Jacksonville
- **Draft Plan Comment Period**: Nov 2016

**Clarify Purpose and Issues Identification**

**Review Best Practices and Begin Solutions Identification**

**Review Data/Analysis and Refine Solutions**

**Building Draft Policy Plan**
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

Sources: ATRI, 2015, Freight Mobility and Trade Plan, FDOT, 2014, Motor Carrier Working Group
### FMSCP Critical Issues Survey Results

(As of 4/3/16)

<table>
<thead>
<tr>
<th>36 Respondents (representing 68 perspectives)</th>
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<tbody>
<tr>
<td>State Agency (e.g. FDOT, FDACS)</td>
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<tr>
<td>MPO</td>
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<tr>
<td>Economic Development Council</td>
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<tr>
<td>Local Government</td>
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<td>Carrier</td>
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<td>Transporter</td>
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<td>Receiver</td>
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<td>Truck-Fleet Operator</td>
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<tr>
<td>Fleet Operator</td>
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<tr>
<td>Distribution Center</td>
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<tr>
<td>Other</td>
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</tbody>
</table>
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)
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)
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.
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

Source: ATRI, 2015
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.

Source: ATRI, 2015
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.

Source: ATRI, 2015
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.

Source: ATRI, 2015
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.

*Source: ATRI, 2015*
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**

Source: ATRI, 2015
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

Source: ATRI, 2015
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.

Source: ATRI, 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

Source: ATRI, 2015
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.
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 (DACS).
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
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.
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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Sources: ATRI, 2015, Freight Mobility and Trade Plan, FDOT, 2014, Motor Carrier Working Group
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

Note: These agencies are within major metro regions and have acute congestion issues, safety issues and mobility needs.
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
- **Efficient and Reliable Mobility** for people and freight
- **Agile, Resilient, and Quality** transportation infrastructure
- **More Transportation Choices** for people and freight
- **Economic Competitiveness**
  - Transportation solutions that support Florida’s global economic competitiveness
- **Quality Places** to live, learn, work, and play
  - Transportation solutions that enhance Florida’s environment and conserve energy

*FDOT* Florida Department of Transportation
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

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
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.
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?