MPOAC Institute Development Plan - Final Report for Phase I: Feasibility and Needs Study

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MPOAC Institute
Development Plan

Final Report for Phase I:
Feasibility and Needs Study

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Problem Statement

The Transportation Equity Act for the 21st Century (TEA-21) and its predecessor, the Intermodal Surface Transportation Efficiency Act (ISTEA), strengthened pre-existing local and regional authority in transportation planning. Much of this new decision-making responsibility fell to the Metropolitan Planning Organizations (MPOs). In general, ISTEA and TEA-21 shifted the focus of transportation planning from state and federal highway construction to enhanced multimodal transportation system development through improved long-range transportation decision-making at the metropolitan and regional levels.

Accordingly, transportation decision-makers now face numerous challenges making these complex transportation decisions. The key challenge is to address the need for improved transportation facilities while ensuring sufficient public involvement, coordinating multiple decision-making bodies, and preserving community resources. More specifically, MPO transportation planning and project implementation often requires collaboration with and input from the Florida Department of Transportation (FDOT), local governments, other state and regional agencies, citizens and businesses with a particular emphasis and need for a regional planning outlook. The ability of elected officials, citizens and technical advisors to meet these challenges is complicated by frequent turnover in membership and limited prior individual experience with the metropolitan and regional transportation system and its planning and funding.

Research Purpose

The MPOAC Institute Phase I Feasibility and Needs Study proposed to address these concerns by researching and developing a plan to create a Florida Metropolitan Planning Organization Advisory Council (MPOAC) sponsored Institute. The Institute, as currently envisioned, would enhance MPO members' professional skills, their understanding of transportation decision-making and the key role they play in the process by providing a targeted training program. The proposed Institute would supplement and support existing MPO orientation programs by focusing on enhancing general skills and knowledge common to all MPOs while individual MPOs could focus their resources on addressing challenges and issues unique to their region.

The study featured research into comparable professional educational initiatives, focus groups and surveys with MPO Board, staff and committee members regarding their specific educational needs, the general identification of topics to be covered in a targeted curriculum, a review of likely costs and funding options for an MPOAC training institute, and the design of a practical delivery mechanism. The research effort was guided by input from key transportation planning stakeholders including MPO staff, FDOT representatives and FHWA representatives.

The project involved the following general research tasks and objectives:

- Analyzing existing training models for application to the MPOAC Institute concept;
- Identifying target audiences and their training needs;
- Assessing existing Florida MPO orientation and training efforts for application to the MPOAC Institute concept;
- Recommending curriculum outlines for the targeted audiences (training modules and other training materials developed in later project phases); and
- Identifying and recommending organization, design, structure and funding options for the later phases of MPOAC Institute development.

The results from the research project are described in greater detail in the following four sections. The research conducted and described in the first three sections provided the foundation for the development of recommendations for Phase II of the MPOAC Institute Project contained in the fourth section.

**Identify and Analyze Existing Training Models**

The project team investigated existing continuing education models within Florida and around the country that could offer guidance in the development of an MPO Institute curriculum. This analysis took into account that elected officials serving on MPOs have other responsibilities that sometimes restrain their MPO service. Information was collected through a combination of written requests, telephone interviews and website research.

**United States Department of Transportation (USDOT) Capacity Building Initiative**

The USDOT Transportation Planning Capacity Building Program (a joint effort of the Federal Highway Administration (FHWA) and the Federal Transit Administration (FTA)) is currently developing two 90-minute presentations on planning, one focusing on planning at the metropolitan level, and the other at the state level. These broad overview courses, applicable to a national audience, will provide basic orientation for new participants in the metropolitan and/or statewide transportation planning process. Presentation development is being handled under a contract with the Volpe National Transportation Systems Center. Presentation delivery will be handled jointly by staff of the FTA Region Offices and FHWA Division Offices. FHWA and FTA staff will be certified as trainers by Volpe staff in two train-the-trainer workshops funded through the presentation development contract.

The project involves four primary tasks. The first task involves scanning existing training resources to develop a list of materials to be developed for use in the training programs. The second task involves designing the training program with separate module outlines for the metropolitan planning 90-minute workshop and the statewide planning 90-minute workshop. The third task involves the development of the training materials, including a power-point presentation, with speaker notes and evaluation materials, and 400 page loose leaf notebooks for both types of workshops. The fourth and final task involves organizing and conducting two
train-the-trainer workshops. The budget for this project is $72,200 and assumes $5,200 for travel expenses.

The staff with the USDOT Capacity Building Program expressed a strong interest in coordinating with the MPOAC Institute Project Team to develop Florida-specific supplemental material to be incorporated into their presentations and materials in Florida.

**National Highway Institute (NHI) and National Transit Institute (NTI)**

The NHI and NTI are jointly developing and offering a 3-day Metropolitan Transportation Planning Course. The NHI funded and managed course development while the NTI is funding and managing the delivery logistics. The NTI training delivery model provides training on a fixed schedule basis through a host agency arrangement. The host agency provides meeting space and may handle some workshop logistics, while the NTI funds trainer fees and training materials expenses. The target audience for the 3-day intensive training is professional planners and engineers involved in the metropolitan transportation planning process. The NTI expects to deliver the course approximately 24 times over a 2-year period.

The initial contract budget for the development of the course was $150,000, but the budget was supplemented and extended several times. While the total cost including budget supplements was not known, it was significantly higher than the amount originally budgeted. This was due, in part, to an open and extensive stakeholder input and committee process that required more resources than originally anticipated.

The items developed under this project include:

- Training notebooks
- Problems and group exercises
- A PowerPoint presentation with speaker talking points
- A reference manual on CD-ROM
- An 11-minute video on CD-ROM (professional quality with extensive travel to appropriate locations; total cost between $50,000 and $100,000; this was not included in the original $150,000 budget)

The estimated average delivery cost for each 3-day workshop is $14,000. This does not include the cost of one or more instructors who are employees of the FHWA or FTA, a significant supplement to the overall cost of training delivery.
American Association of State Highway Transportation Officials (AASHTO) National Transportation Leadership Institute

Offered by the Indiana University School of Public and Environmental Affairs, the AASHTO National Transportation Leadership Institute (NTLI) is a two-week long conference designed to address the opportunities and challenges that managers and their departments face in the transportation industry. The Institute was created to address organizational conflict and change, the challenges of organizational structure and size as well as effective communication strategies and cultural issues. In a two-week course the Institute focuses first on the basic practices of transportation management followed by more advanced training on leadership skills.

Based on a review of the course schedule, the course length and its focus on management skills, the NTLI does not offer much insight for the development of an MPOAC Institute.

The Florida Association of Counties (FAC)

In 1996, the Florida Association of Counties created the County Commissioners Voluntary Certification Program. Over 400 county commissioners have participated with over 150 graduates. The certification program requires participants to complete 30 hours of training and takes between 18 to 24 months to earn. The curriculum is designed to build the core knowledge and special skills commissioners need in their role as elected county officials. It is taught in one-day single subject workshop formats. The face-to-face nature of the workshops enhances participants’ opportunities for building relationships and sharing lessons learned from their respective experiences. Upon completion of the requirements, commissioners receive the designation of Certified County Commissioner and are recognized in a ceremony at FAC’s Annual Conference.

Though the program is primarily aimed at elected officials, it is open to anyone and usually includes some county staff. The $110 registration fee for each one-day workshop only covers basic costs. The FAC subsidizes the workshops through in-house publicity and other administrative assistance. The workshops are offered in various locations and often in connection with annual or special issue conferences to make the program more accessible.

The program offers guidance for the development of an MPOAC Institute, by focusing curriculum on what commissioners need to know, by offering workshops in various locations in connection with other events, and rewarding participation with recognition.

The Florida League of Cities (FLC)/Florida Institute of Government

The Florida League of Cities and the John Scott Dailey Florida Institute of Government created, administers and offers the Institute for Elected Municipal Officials (IEMO). The primary objective of the Institute is to provide elected municipal officials with an intensive academic program that will assist them in effectively meeting the requirements of their elected role. The
Institute offers a comprehensive overview of Florida municipal government for newly elected officials. Started in 1992, the IEMO program has graduated more than 1,000 municipal officials.

The Institute is a three-day program structured in a Friday through Sunday format. The format allows participants to share experiences and to focus on the curriculum. The curriculum is divided into six instructional modules, taught in a specific sequence. The topics provide a comprehensive overview of the critical issues that must be addressed by municipal government officials.

The Institute is offered several times a year at various locations throughout the state to make the program more accessible. Participants receive a certificate of attendance for successful completion of the program of study. A registration fee of $200 ($225 on-site) covers instructional costs, materials, refreshment breaks and lunch on Friday and Sunday. Participation is usually limited to 20 to 25 members depending on the site. Individual participants are responsible for their own travel costs.

An Advanced Institute was developed in 1994 for IEMO graduates and city officials who have completed more than one term of office. Designed to pick up where the IEMO leaves off, this two-day program offers four classes taught in a participatory style and two workshop-style lunches. The program is offered twice a year in a Friday through Saturday format at various locations. The cost is $185.00 ($210 on-site) and includes both working lunches.

The EIMO offers a successful and familiar Florida model for development of an MPOAC Institute. Key elements to consider include the use of modules in creating the curriculum, offering a comprehensive overview for newly elected officials then building on the experience with a more advanced curriculum, and delivery of the curriculum in focused two or three-day, face-to-face trainings.

**Other states and MPOs**

Based on conversations with the MPOAC Institute Project Team, Charles Goodman from the Federal Transit Administration submitted a request for information on training and orientation programs targeted to MPO Board Members to a national list serve offered by the Association of Metropolitan Planning Organizations (ampo@scpp.ubalt.edu). Twelve individual MPOs from seven different states responded with information.

Each of the responding MPOs created and offered their own version of orientation or training for new members. None of the respondents indicated they were aware of any current orientation or training efforts targeted to new MPO Board Members at a statewide level.

Most of the responding MPOs offer their members a set of background materials and a personal information briefing. The materials are often offered as a "guidebook" and contain some combination of current MPO publications, bylaws, membership rosters, pertinent laws and regulations, explanations of the planning, programming, and project implementation process, a glossary of terms, and copies of the Transportation Improvement Program (TIP) and long-range...
transportation plan. A few respondents use brief, simple PowerPoint presentations for orientation of new members as a group or through full board meetings. The MPOs try to keep costs down by relying on staff to pull together and present existing materials.

Conclusions

What these results reveal is that the MPOAC Institute initiative is unlike any other ongoing training initiative for MPO participants anywhere in the United States. What training is being done elsewhere in the field of transportation planning is mostly either very abbreviated or for limited audiences. A properly developed MPOAC Institute could, therefore, both expect to reach more MPO participants than other programs and allow them a richer understanding than they currently can glean from these services. The training models encountered in this task will continue to guide the development of the most effective training program possible.

Target Audiences and Their Training Needs

The project team was tasked to identify the priority target audiences for training and their professional education, training and information needs. To achieve this end, the project team used a combination of focus groups, informal conversations with MPO participants, and survey research.

Focus Groups – July 2003

The starting point for identifying training needs and priority target audiences was a pair of focus groups, one with MPO Governing Board members who serve on the MPOAC and the other with MPO Staff Directors. Over a dozen MPO Governing Board members and MPO Staff Directors participated in these two focus groups. The purpose of these focus groups was to develop a sense of the most important training needs of MPO participants.

The protocol for these focus groups was very simple. The team's intention was to facilitate a relatively unstructured, free-flowing conversation among participants about their MPO experiences and how they related to training needs. Three basic concept questions were used as the framework for these discussions:

- Now that you have been involved in the MPO planning process for some time, what do you know now that you wish you had known when you started?
- What do you still find challenging about the MPO planning process?
- Thinking about the people you work with (MPO board members, MPO staff, FDOT and other agency representatives, advisory committee members), what are some things you wish they understood better about the MPO planning process?
Three project team members took notes during the focus group sessions to ensure that the opinions expressed by the participants were accurately captured.

Over 60 individual areas for training were identified by the participants in the two focus groups, ranging from very broad concerns to very specific issues. For example, in discussing training needs related to funding, participants spoke both of the need to cover funding in general (e.g., sources and uses of funds) and of the need to understand how much local commitment is necessary to demonstrate to the federal government that the local community is serious about a project.

Survey of MPO Participants

After the project team considered various organizational strategies for grouping the numerous training topics identified by the focus groups, five broad topical groupings or headings were developed:

- Transportation Policy Overview - An overview of federal and state transportation legislation, the origin and nature of the MPO, and the connection between transportation planning and other social and economic issues.
- The MPO Transportation Planning Process - An examination of the legislatively mandated MPO transportation planning process.
- The Organization of Transportation Planning - The structure and responsibilities of MPOs, FDOT, FHWA/FTA, the Florida Transportation Commission, and others.
- Funding of Transportation Planning and Projects - The uses and limitations of the various transportation planning and project funding sources.
- Working with Transportation Partners - Methods, skills, and strategies for working with board members, committees, staff, other agencies, non-engaged stakeholders, and the general public.

The individual and more specific items generated in the focus group sessions then were grouped under these five headings. Some items were removed or consolidated with others because it was concluded that the items were too narrow on their own. In a very few cases, an additional item was created by the project team in order to include a possible training need that did not surface during the focus group sessions, or was only mentioned in passing. In all, forty individual subjects for training were grouped into these five areas.

From this list, a survey instrument was developed that invited respondents to assess the relative importance, in terms of the training needs of MPO participants, of the five broad areas and the individual subjects in each area. Respondents were asked to place the broad categories in rank order by importance for training purposes, then to indicate the four most important specific subjects for training in each of the five broad areas. Respondents also were asked about their
MPO affiliation, their role in the MPO, and the number of years in which they had been involved in the MPO planning process in some capacity.

Two different versions of the questionnaire were developed, one designed for MPO staff, one for MPO Governing Board and committee participants. The only difference between the two instruments was the language of the question asking respondents to rank order the five broad categories in terms of their importance from a training perspective. Otherwise, all of the items on the two instruments were identical.

Electronic versions of both questionnaires were distributed via email in October 2003 to all MPOs in Florida. MPO staffs were asked to make copies and distribute them to MPO Governing Board members, MPO Committee members, and MPO staff. MPO staffs were also requested to collect completed questionnaires from MPO participants and return them to the research team.

A total of 256 responses were received, representing 15 of the state’s 26 MPOs. Fifteen percent of the respondents were MPO Governing Board members, 26% were MPO staff members, 25% were Technical Advisory Committee members, and 34% were members of a citizen’s advisory, bicycle/pedestrian or other advisory committee. The median years of experience with the MPO planning process was five (5), with the least experienced respondent serving less than a year and the most experienced serving 40 years.

Respondents ranked the five broad categories as follows:

1. The Transportation Planning Process (Mean rank 2.46)
2. Funding for Transportation Planning and Projects (Mean rank 2.72)
3. Transportation Policy Overview (Mean rank 2.91)
4. The Organization of Transportation Planning (Mean rank 3.09)
5. Working with Transportation Partners (Mean rank 3.82)

Friedman’s test, a variant of Chi-square applicable to mean rankings, indicates that the differences in mean rankings are statistically significant (p<.001). The observed rankings consequently can be relied upon to illustrate real and substantial differences in the perceived importance of these five broad areas for training purposes.

Within each broad area, respondents indicated up to four specific subjects that they considered to be the most important. The most important topics in the Transportation Planning Process, according to respondents, are:

1. Transportation project funding and implementation through project prioritization and the Transportation Improvement Program (TIP) (69.3%).

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1 Percentages reported in parenthesis are the percentage of respondents that selected that particular subject as one of the four most important in the broad area. Subjects listed attracted votes from approximately 50% of respondents. Slight variations in this standard from one broad subject area to the next reflect an analysis of the statistical significance of the difference of the proportion of respondents identifying the specific subject as important.
2. The relationship between various MPO activities and those of other agencies (e.g., FDOT, local jurisdictions, transit agencies) (58.2%).
3. The Long Range Transportation Plan (LRTP) (53.8%).
4. Basic transportation planning concepts and techniques (e.g., trip generation, transportation modeling, level of service) (53.4%).
5. Required MPO activities and products and their development and updating cycles (49.4%).

The most important topics in *Funding for Transportation Planning and Projects* are:

1. Local funding options for planning and project implementation (e.g., local option gas tax, sales tax, tax increment financing) (72.4%).
2. Allocation, use and requirements of federal transportation planning and transit planning funds (66.9%).
3. An overview of federal and state transportation project funds (65.4%).
4. Allocation, use, requirements and limitations of state transportation project funds (63.8%).

The most important topics in *Transportation Policy Overview* are:

1. Transportation and growth management, economic development, and quality of life (76.7%).
2. Powers and responsibilities of the MPO under federal and state law (74.7%).
3. Planning versus implementation and management (64.8%).
4. Transportation modes and the concept of intermodalism (58.5%).

The most important topics in *Organization of Transportation Planning* are:

1. Role of local jurisdictions relative to metropolitan transportation planning and implementation (83.1%).
2. The authority and responsibility of the MPO, FDOT and other agencies (78.7%).

The most important topics in *Working with Transportation Partners* are:

1. Working effectively with local governments (cities, counties, school districts) (71.0%).
2. Working effectively with the FDOT central, district and state offices (65.9%).
3. Working effectively with other transportation agencies (e.g., transit agencies, airports, seaports, expressway authorities) (54.4%).
4. Working effectively with regional agencies (e.g., regional planning councils, water management districts, transit agencies) (50.0%).

5. Working effectively with MPO staff, board, and committee members (50.0%).

6. Working effectively with activists and with the general public (47.6%).

**Focus Groups – January 2004**

In January 2004, the project team conducted two additional focus groups, one comprised of MPO Governing Board members and one of MPO Staff Directors. In part, the purpose of these focus groups was to provide additional validation of the results of the survey. Both groups indicated that, on balance, the findings of the survey were reasonable and sensible. Some surprise was expressed over the low ranking in relative importance of *Working Together with Transportation Partners*. Some focus group participants suggested that this low ranking may reflect the sense people involved in this highly public process have that they know how to work with others. Others suggested that people often do not think they need help or training in working with others and other organizations until they are in crisis.

The focus groups also asked for further analysis of the data to determine whether there were substantial and significant differences between the rankings offered by governing board members and those offered by other respondents. When the project team undertook this analysis, very few differences in overall rankings of importance emerged, none of them leading to significantly different conclusions than an examination of the entire dataset produced. The overall sample results thus were used for all subsequent project work.

The commonality of concerns and priorities also suggested that a training program developed for one target audience in the process would have much to offer other target audiences. Based on conversations at both focus groups and with various MPOAC Governing Board members and MPO Staff Directors, the project team concluded that the first and most important target audience for a training program would be MPO Governing Board members.

**Identify and Learn from Existing Florida MPO Orientation and Training Efforts**

Prior to considering the development of a statewide training program under the MPOAC Institute umbrella, it was important to identify and learn from existing Florida MPO efforts at orientation, education and skills training for the various MPO audiences.

By collecting information through written and telephone interviews, the project team assembled a database of training practices used by all 25 MPOs in the state. Current MPO training practices in the state are summarized in Table 1.
Almost every MPO in the state offers new MPO Board members individual or group orientation to the MPO process. The most popular delivery mechanism is a one-hour individual meeting with the MPO Staff Director, with approximately one-third of the MPOs in the state requiring such a meeting. MPO Staff Directors emphasized the time constraints of the average MPO Board member’s daily schedule when discussing their individual orientation efforts. The one-hour one-on-one orientation is likely the most popular delivery mechanism because it is the most flexible in terms of scheduling.

Only a handful of MPOs in the state provide some form of group orientation for MPO Board members. The group orientation efforts range from a 3-hour meeting held separately from regular MPO meetings to an agenda item at the first MPO Board meeting of the calendar year.

Approximately half of the MPOs in the state offer MPO committee members the option to have an individual meeting with an MPO staff member to learn about the MPO process. Additionally, about one-third of the MPOs in the state provide a group orientation for MPO committee members. Most of these are offered in conjunction with group orientation for MPO Board members.

A majority of MPOs in the state have developed hard copy orientation materials for distribution to new MPO Board and/or committee members. While some MPOs simply provide copies of key MPO documents (Unified Planning Work Program, Long Range Transportation Plan, Transportation Improvement Program, etc.) to their new MPO Board and committee members, others provide loose-leaf binders containing a variety of information including such items as state and federal statutes pertaining to metropolitan transportation planning, MPO product cycles, MPO Board and committee member rosters and bylaws, and a glossary of acronyms. Additionally, a few MPOs have developed PowerPoint presentations that they use in group or individual orientation meetings and include handouts of that presentation as part of the orientation materials provided.

Only a few MPOs provide any form of formalized continuing education. Efforts ranged from MPO Board retreats that include speakers on various currently relevant topics to informational presentations made as an agenda item at regularly occurring MPO Board or committee meetings. That said, most MPOs emphasized that they take time to refresh members’ knowledge of

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2 Percentages in this table sum to more than 100% because many MPOs employ more than one training practice.
Development of Recommendations for Phase II MPOAC Institute Project

The research conducted to complete previous tasks provides the foundation for the development of recommendations for Phase II of the MPOAC Institute Project. Four sets of recommendations emerged from that work and other supporting research:

Recommended organizational structure of the MPOAC Institute in relation to the MPOAC and MPOs in Florida

The fundamental question to be answered with regard to organizational structure is whether the MPOAC Institute ought to remain fully under the control and management of the MPOAC itself, or whether it should be given some other institutional home. Either approach allows for the MPOAC to contract with others for management and delivery of training. Based on a review of the options, the project team recommends:

- The MPOAC Institute should remain ‘in-house’, an ongoing element of the MPOAC, fully under the control and management of the Executive Director and Governing Board.

Keeping the MPOAC Institute ‘in house’ provides the MPOAC, through its Executive Director and Governing Board, maximum control over the content and delivery of Institute programs. It also secures for the Institute some financial advantages that derive from state agency ownership (e.g., lower indirect costs with state university organizations). In keeping with the rules under which local officials in Florida operate, it also places the work of the Institute and its materials firmly in the ‘sunshine’, helping to ensure full accountability for the work of the Institute.

Perhaps the most significant disadvantage to keeping the Institute in house would be the added administrative burden associated with the actual delivery of training programs (e.g., selection of sites, securing facilities, handling reservations). Recognizing this, the project team recommends:

- Development of a budget for Phase III (training delivery) should include funding to handle all administrative matters associated with the delivery of Institute training programs and a mechanism for handling Institute administrative matters that does not require the daily attention of the MPOAC Executive Director or current MPOAC staff.
Recommended curriculum outline and delivery mechanisms for targeted audiences

Target Audience

One consistent message from both sets of focus groups and various conversations with MPOAC Board members, MPO Staff Directors, and others is that training is important for a wide range of MPO participants. Only staff members have reasonably ready and reasonably consistent access to training (subject, of course, to availability of funding). In fact, the project team, in its various conversations with representatives of various transportation associations, has found that nearly all of the training programs they offer are aimed primarily at the professional MPO staff member and other professionals, and that little if anything is consistently available to help MPO Board and/or committee members develop their skills and knowledge.

When the participants in the January 2004 focus groups were asked about target audiences for training, they clearly recognized this fact. They also were quick to conclude that, while there would be considerable value in training programs for MPO committee members, the greatest need at this time was to train MPO Board members. This view was shared by MPOAC Governing Board members and by MPO Staff Directors, and has been echoed in other conversations outside of the focus group process.

The reasons for placing a priority on training MPO Board members, at this time, are multiple. MPO Board members, of course, are the ones with the authority to exercise the power of the MPO. MPO Board members also have a fairly high degree of 'exposure' in carrying that authority, a factor that may make them more interested in receiving training. It also was acknowledged by focus group participants that MPO Board members were more likely to authorize some expenditure of funds for the training of MPO Board members than they were to authorize funding of training for MPO committee members.

Finally, and not unimportantly, the results of the survey, when analyzed by role in the MPO process, reveal that, for the most part, the training needs of MPO Board members and of MPO committee members are similar, and often essentially identical. The development of training materials for MPO Board members, therefore, will be a significant step toward the development of training materials for MPO committee members. As a result, the work in Phase II of the MPOAC Institute, even if it is aimed at meeting the needs of MPO Board members, is likely to accomplish much of what will be needed to deliver training programs for MPO committee members as well.

Taking all of these considerations into account, the project team recommends:

- Phase II of the MPOAC Institute should be focused on the development of training materials for MPO Board members.
Delivery Mechanism

The January 2004 focus groups were devoted primarily to the development and evaluation of alternative delivery mechanisms for the MPOAC Institute training programs. Participants were asked: first, to identify alternative training mechanisms; second, to identify strengths and weaknesses of each mechanism; and third, to cast their individual votes for the preferred training mechanisms in light of their own experience and the conversation of the group.

Because these discussions were left very open-ended, to encourage creative contribution by the groups, the list of ideas generated by the MPO Governing Board group is not identical, either in content or in organization, to that generated by the MPO Staff Directors, though considerable overlap is evident.

MPO Governing Board members generated the following suggestions:

- Computer-based training
  - Fully-developed interactive training program
  - More basic use of website/email/listserv to make materials available
- Regional workshop/seminar
- Statewide workshops/seminars
  - Stand-alone
  - Associated with some other state-wide conference/event (e.g., at Florida Association of Counties Annual Conference, or Florida League of Cities Annual Conference)
- Training presented at MPO meetings (Trainer not specified)
- Written materials (e.g., workbooks)
- Training trainers to travel state to deliver training (e.g., at MPO meetings)
- Multi-method, multi-tiered approach

Staff directors generated the following list:

- Computer-based training
  - Fully-developed interactive training program
- Regional workshop/seminar
- State-wide workshop/seminar
  - Stand-alone
  - Workshop/seminar associated with some other state-wide conference/event
- Training presented at MPO meetings
  - Training a ‘trainer’ from among each MPO’s own staff
  - Training by trained trainers from outside of the MPO’s own staff
  - Fully-scripted PowerPoint materials for use by MPO staff
- No change (use only existing training efforts)(the ‘no build’ option for the MPOAC Institute)

At the end of each focus group session, participants were given four sticker ‘dots’ to use in casting their vote for (a) their preferred training mechanisms for MPO Board members, and (b) their preferred training mechanisms for MPO committee members. The top three choices (in
order of preference) of the MPO Governing Board member focus group for training MPO Board members were:

- Statewide workshops/seminars
  - Associated with some other state-wide conference/event (e.g., at Florida Association of Counties Annual Conference, or Florida League of Cities Annual Conference)
- Multi-method, multi-tiered approach
- Statewide workshops/seminars
  - Stand-alone

The top three choices (all with an equal number of votes) of the MPO Staff Director focus group for training MPO Board members were:

- Training a ‘trainer’ from among each MPO’s own staff
  - Incorporating the fully-scripted PowerPoint materials for use by MPO staff
- Training by trained trainers from outside of the MPO’s own staff
- Computer-based training
  - Fully-developed interactive training program

Based on the comments made about the various options during the focus group sessions, it would appear that this total mismatch of preferred delivery mechanisms reflects somewhat different concerns about training and masks some similarities in perspective. For one, both focus groups strongly supported the idea that training ought to occur by multiple means, that no one delivery mechanism was suitable to meet all of the training needs of MPO Board members (let alone MPO committee members).

A second similarity, not evident from the rankings but very evident in the comments made by focus group participants, was the view that at least some of the training needed to be provided by people other than those serving on the particular MPO staff. Multiple reasons were offered for this view. MPO Staff Directors pointed out staff shortages and the fact that, when they hire staff, they rarely have the luxury of hiring exclusively or even primarily for the skill set most relevant to trainers. Both MPO Staff Directors and MPO Governing Board members also spoke of the need for a fresh perspective from new voices and the peculiar phenomenon captured in aphorisms like “familiarity breeds contempt” or “an expert is someone who comes from 50 miles out of town”. Both groups agreed that training delivered by people from ‘elsewhere’ will often prove more effective than comparable training presented by the staff of a particular MPO, even if the staff is entirely familiar with the material and, in fact, skilled in presentation and training techniques.

The heart of the difference in preferred mechanisms seemed to reflect different primary concerns in evaluating options. MPO Staff Directors expressed concern about the willingness of MPO Board members to give up the time necessary to participate in workshops and seminars that would be delivered ‘off-site’. To a lesser extent, MPO Staff Directors also expressed concern about the costs associated with such training programs and where the money would come from to send individual MPO Board members to these workshops. MPO Governing Board members, by contrast, emphasized the value in focused time and attention on these issues, away from the
distractions of the everyday responsibilities of office. MPO Governing Board members also objected to the notion that trainings would take place in the context of MPO meetings, since they would require those more experienced MPO Board members to sit through (or wait for) frequent trainings as new members came on and encountered elements of the MPO process that were unfamiliar to them. Finally, MPO Governing Board members, pointing to the experience of the focus groups themselves, as well as other off-site experiences in which they had participated, emphasized the intrinsic value of bringing people together from a variety of MPOs and various parts of the state. They expressed considerable interest in creating opportunities for MPO Board members from across the state to come together and learn from each other, as well as from formal presentations.

The project team took all of these recommendations and rationales into account, together with the nature of the content to be delivered that Task II had established, in developing recommendations for delivery. In particular, the project team is very conscious of the large volume of important material participants in the Task II research activities identified. Clearly, there is a need for some mechanism to deliver comprehensive training in the MPO process, a mechanism that almost has to involve an extended, concentrated period of training. Additionally, there is a need to facilitate as much participation in training as possible, even if that training is partial. Finally, based on the project team’s research into existing efforts by Florida MPOs to train their participants, there is a need for support for these training efforts to facilitate delivery of important content to MPO Board members at their own MPOs.

In light of all of these considerations, the project team recommends a multi-tiered, multi-method delivery mechanism for training:

- Comprehensive weekend training institute with curriculum designed in modules
- Regional/pre-conference half-day workshops based on modules from weekend training
- MPO orientation presentation built on federal investment that utilizes material from the weekend training, customized to Florida
- Website posting of materials which makes comprehensive content available to MPOs as needed

**Curriculum Outline**

Based on the research into important content and preferred delivery mechanisms, the project team drafted an outline for a comprehensive training program. The underlying approach is to develop a fully-integrated, comprehensive, interactive training program built around the weekend training institute experience, but designed in modular fashion so that, with relatively little additional time and effort, individual segments of the weekend training program could be delivered in shorter experiences like pre-conference workshops or half-day seminars. This approach maximizes the value to be derived from every dollar spent on curriculum development, because each unit created can be utilized in multiple contexts for multiple purposes.

The curriculum outline the project team recommends is contained in Appendix 1 of this report.
Estimated cost for curriculum development and institutional delivery mechanisms for targeted audiences

After conversations with representatives of other organizations that have developed programs of the scope of the proposed MPOAC Institute, an examination of the likely demands of the development of the specific recommended curriculum, and reflection on training program and curriculum development members of the project team have undertaken in the past, the project team **recommends** the following budget for Phase II – Curriculum Development and Pilot Testing:

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**Recommended funding options for future phases of the MPOAC Institute project**

The project team investigated a number of alternative funding strategies. Over the course of Phase I of the MPOAC Institute Project, it became clear that the MPOAC's training initiative was beginning to attract national attention. Should the MPOAC wish to pursue direct federal support for the Institute, it is likely to be forthcoming.

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That said, there are distinct advantages to funding the MPOAC Institute Project through federal planning (PL) or other funds under the direct control of the MPOAC and/or individual MPOs. The first and most important of these is that the MPO process in Florida, while sharing important elements in common with the MPO process in other parts of the country, is also a process that has important characteristics unique to Florida, driven by Florida law, policies, and politics. Funding that would come to the MPOAC Institute Project directly from the federal government would have to be spent on content that was of national value and would inhibit the extent to which the MPOAC Institute could be developed so as to respond specifically to the needs of MPOs in Florida.

Second, there is a substantial cost savings in working with funds already allocated to the state, even though those funds are federal in origin. If the contract for a portion of the MPOAC Institute Project was with the federal government, instead of the MPOAC, as would be required with direct federal funding, the policies of the University of South Florida (and other state universities) would require the assessment of a 45% indirect cost, as opposed to the 5% currently assessed for MPOAC Institute Phase I.

Finally, the direct and unambiguous lines of accountability from the project team to the MPOAC will help to continue to ensure that the project meets the needs and expectations of the MPOs of Florida. The more funding partners involved in underwriting the project, the more and the more complex the lines of accountability.

Therefore, the project team focused on various funding mechanisms that placed the MPOAC and its members in direct control of the MPOAC Institute Phase II project. Options included individual MPO contributions from their individual funding sources, a voluntary off-the-top allocation of PL funds through a modification of the statewide PL funding formula, and a transfer of funds from the PL reserve maintained by the FDOT to meet unanticipated financial needs of the state’s MPOs. At the April 2004 meeting of the MPOAC, the MPOAC Governing Board approved an off-the-top allocation of PL funds through a modification of the statewide PL funding formula. However, subsequent to the action of the MPOAC Governing Board, the FDOT determined that sufficient funds to cover the costs associated with the MPOAC Institute Phase II project could be made available from the statewide PL reserve.

Having considered these factors and examined a variety of options, the project team recommends:

- Allocation of funds sufficient to cover the proposed budget of the MPOAC Institute Phase II project (as described in this report and subject to the final approval of the MPOAC Governing Board) be made available from the statewide PL reserve.

**Recommended Scope for MPOAC Institute Phase II Project, MPO Board Member Training Curriculum Development**

Based on the findings and observations made during the Phase I study, the project team developed a recommended scope and budget for the completion of the MPOAC Institute Phase II
project. The recommended scope includes detailed descriptions of the work tasks and deliverables for the Phase II project, as well as a detailed project budget including estimated costs for labor, travel, and expenses. In addition to preparing training materials as described previously in this report, the project team will also identify suitable funding mechanisms and organizational structures to sustain the continued implementation (including training delivery) of the MPOAC Institute.

The Phase II project is expected to take approximately 2 years to complete at a total cost of approximately $180,000. The recommended scope and budget are included in Appendix 2 of this report.
APPENDIX 1: Topical MPOAC Institute Curriculum Outline

I. The Metropolitan Planning Organization
   A. Brief history of federal transportation legislation
   B. The creation of MPOs in law
   C. MPOs by federal statute
      1. Responsibilities
      2. Powers
      3. Role
   D. MPOs by Florida statute
      1. Responsibilities
      2. Powers
      3. Role

II. Planning Transportation – Essential Concepts
   A. Planning versus implementation
   B. Transportation modes and intermodalism
   C. Macro-level relationships
      1. Economic development
      2. Growth management / quality of life
      3. Environmental preservation
   D. Transportation Planning Concepts and Techniques
      1. Core concepts (the alphabet soup of transportation)
      2. Transportation modeling
      3. Intelligent Transportation Systems (ITS)
      4. Transit

III. The Planning Process
   A. Required MPO activities, products and planning cycles
   B. The players / partners in transportation planning
      1. FDOT and other MPOs
      2. FHWA/FTA
      3. FTC, legislature and governor
      4. Local governments
      5. Other transportation agencies
      6. Regional agencies
      7. Stakeholders
      8. The public
   C. The project prioritization process and TIP
   D. Developing the UPWP
   E. The LRTP update process
   F. Special requirements and processes
      1. Public participation requirements
      2. Civil rights / environmental justice
3. NEPA
4. Air quality conformance

G. Regionalism
H. Putting it all together – role playing / simulation

IV. Funding
A. Federal funds
   1. Types
   2. Allocation
   3. Use
B. State funds
   1. Types
   2. Allocation
   3. Use
C. Local funding options
   1. Types
   2. Allocation
   3. Use
D. Packaging a project – funding from initial planning to implementation
   1. What funds to use where
   2. Matching and leveraging
E. Putting it all together – role playing / simulation
APPENDIX 2: Proposed Phase II Project Scope

PROBLEM STATEMENT

The Transportation Equity Act for the 21st Century (TEA-21) and its predecessor, the Intermodal Surface Transportation Efficiency Act (ISTEA), strengthened pre-existing local and regional authority in transportation planning. Much of this new decision-making responsibility fell to the Metropolitan Planning Organizations (MPOs). In general, ISTEA and TEA-21 shifted the focus of transportation planning from state and federal highway construction to enhanced multimodal transportation system development through improved long-range transportation decision-making at the metropolitan and regional level.

Accordingly, transportation decision-makers now face numerous challenges making these complex transportation decisions. The key challenge is to address the need for improved transportation facilities while ensuring sufficient public involvement, coordinating multiple decision-making bodies, and preserving community resources. More specifically, MPO transportation planning and project implementation often requires collaboration with and input from the Florida Department of Transportation (FDOT), local governments, other state and regional agencies, citizens and businesses with a particular emphasis and need for a regional planning outlook. The ability of MPO Board members to meet these challenges is complicated by frequent turnover in membership and limited prior individual experience with the metropolitan and regional transportation system and its planning and funding.

RESEARCH PURPOSE

In Fiscal Year 2003-04, the MPOAC commissioned the MPOAC Institute Phase I Feasibility and Needs Study. The purpose of the Phase I study was to research and develop a plan to create an MPOAC sponsored training institute for MPO participants. The overarching goal of the MPOAC Institute initiative is to enhance MPO members’ professional skills and their understanding of transportation decision-making, including the key role they play in the process. The Phase I study identified educational needs for MPO Board Members, general topics to be covered in a targeted curriculum for MPO Board Members, a practical training approach, and the estimated cost of curriculum development.

The MPOAC Institute Phase II MPO Board Member Training Curriculum Development project will develop a multi-tiered training approach for MPO Board members and identify strategies for sustaining the Institute. Specifically, the Phase II project will result in the following training products:

- Curriculum and Materials for a Weekend Institute – a weekend institute for MPO Board members interested in developing expertise and leadership skills in the metropolitan transportation planning process;
- Curriculum and Materials for Half-Day Workshops – half-day workshops for MPO Board members consisting of a two-hour orientation session followed by a two-hour training session on an issue of current concern to MPO members;
- Supplemental Orientation Materials – state-specific overview materials to supplement the 90-minute metropolitan transportation planning orientation program currently being developed by the USDOT Transportation Planning Capacity Building Program; and
- Web Materials – all training materials made available over the Internet for convenient use by the MPOAC membership.
The project will involve the following general research objectives:

- Developing a comprehensive training curriculum to address the training needs identified in Phase I;
- Developing presentation materials (PowerPoint slides and hand-outs) suitable for both the full weekend and half-day workshop formats, as well as the supplemental material for the orientation presentation;
- Developing extensive speaker notes corresponding to the various presentation materials;
- Developing exercises and other interactive training materials to reinforce the information being conveyed by the various presentation materials;
- Developing a training resource notebook containing supplemental information relevant to the subject matter being presented as part of the training curriculum;
- Pilot testing selected training materials for clarity, flow, and effectiveness in keeping with the intended training purpose; and
- Identifying suitable funding mechanisms and organizational structures to sustain the continued implementation (including training delivery) of the MPOAC Institute.

PROJECT TASKS

Phase II will involve the following tasks:

Task 1: Development of Supplemental Materials to Support Federal Orientation Program

The USDOT Transportation Planning Capacity Building Program is currently developing a 90-minute orientation presentation on metropolitan planning for MPO Board members and participants in the metropolitan transportation planning process. This will be an overview providing a basic orientation to the metropolitan transportation planning process. Trained staff from the Federal Transit Administration regional offices and the Federal Highway Administration division offices will deliver the orientation program on-site at individual MPOs.

The MPOAC Institute project team will develop additional, Florida-specific, presentation and resource materials to supplement the information contained in the USDOT orientation program. The project team will also develop extensive speaker notes to maximize delivery options. This task will be coordinated with the USDOT project team to ensure content compatibility.

Deliverables:

- Presentation materials (PowerPoint slides and handouts) providing Florida-specific information, coordinated with and supplemental to general information provided in the USDOT Orientation Program
- Extensive speaker notes
- Supplemental resource materials, as appropriate

Task 2: Development of Module I - The Metropolitan Planning Organization

The project team will develop a training module providing essential background on Metropolitan Planning Organizations (MPOs) and their role and responsibilities under Federal and Florida law. Module content will include, but not be limited to, such topics as:
The history of transportation legislation;
The creation of MPOs in law;
MPO responsibilities, powers and roles in federal statute; and
MPO responsibilities, powers and roles in Florida statute.

Additionally, the project team will develop exercises and other interactive training materials to reinforce the lessons of the training module. Supplemental resource materials providing additional background information will be compiled in a take-home reference notebook. The project team will also develop extensive speaker notes to maximize delivery options.

Deliverables:
✓ Presentation materials (PowerPoint slides and handouts)
✓ Extensive speaker notes
✓ Exercises and other interactive training materials
✓ Supplemental resource materials, as appropriate

Task 3: Development of Module II - Planning Transportation - Essential Concepts

The project team will develop a training module covering essential concepts in transportation planning. Using everyday terms and concepts, this module will demystify the technical aspect of transportation planning. This will provide MPO Board members with a clearer understanding of the various considerations and techniques employed in the metropolitan transportation planning process. Module content will include, but not be limited to, such topics as:

• Planning versus implementation;
• Transportation modes and intermodalism;
• The macro-level relationship between transportation and other considerations such as economic development, environmental preservation, growth management; and
• Core transportation planning concepts and techniques such as transportation modeling and level of service analysis.

Additionally, the project team will develop exercises and other interactive training materials to reinforce the lessons of the training module. Supplemental resource materials providing additional background information will be compiled in a take-home reference notebook. The project team will also develop extensive speaker notes to maximize delivery options.

Deliverables:
✓ Presentation materials (PowerPoint slides and handouts)
✓ Extensive speaker notes
✓ Exercises and other interactive training materials
✓ Supplemental resource materials, as appropriate

Task 4: Development of Module III - The Planning Process

The project team will develop a training module focusing on the MPO planning process. This module will detail the MPO planning cycle, the products resulting from the planning cycle and the activities required to keep the planning cycle moving. The module will also clarify the relationship between the
MPO and other players/partners in the transportation planning process. Module content will include, but not be limited to, such topics as:

- Required MPO activities, products and planning cycles;
- The players/partners in transportation planning;
- The project prioritization process and the Transportation Improvement Program (TIP);
- Developing the Unified Planning Work Program (UPWP);
- Long-Range planning and developing the Long-Range Transportation Plan (LRTP);
- Regionalism and transportation planning; and
- Other special requirements such as public participation, civil rights, air quality conformity, environmental protection and more.

Additionally, the project team will develop exercises and other interactive training materials to reinforce the lessons of the training module. Supplemental resource materials providing additional background information will be compiled in a take-home reference notebook. The project team will also develop extensive speaker notes to maximize delivery options.

Deliverables:

- Presentation materials (PowerPoint slides and handouts)
- Extensive speaker notes
- Exercises and other interactive training materials
- Supplemental resource materials, as appropriate

Task 5: Development of Module IV - Funding

The project team will develop a training module focusing on transportation project funding issues. This module will sort through the various funding opportunities and requirements provided at the federal, state and local levels. Module content will include, but not be limited to, such topics as:

- Federal funding types, allocation and use;
- State funding types, allocation and use;
- Local funding types, allocation and use; and
- Funding a project from planning to implementation.

Additionally, the project team will develop exercises and other interactive training materials to reinforce the lessons of the training module. Supplemental resource materials providing additional background information will be compiled in a take-home reference notebook. The project team will also develop extensive speaker notes to maximize delivery options.

Deliverables:

- Presentation materials (PowerPoint slides and handouts)
- Extensive speaker notes
- Exercises and other interactive training materials
- Supplemental resource materials, as appropriate
Task 6: Curriculum Integration

The project team will ensure that the training materials developed under this project will flow in a manner that is both coordinated and seamless. Information covered in one module will be consistent with information provided in all other modules. Additionally, information will be nested throughout the training program and concepts addressed early in the training will be expanded upon as the training progresses (particularly for the Weekend Institute) in order to enhance the learning experience.

Deliverable:

✓ Seamless and coordinated training materials for use under a variety of training conditions and delivery mechanisms

Task 7: Pilot Testing

The project team will pilot test select training modules three times during the course of the project for clarity, flow, and effectiveness. The pilot training will be conducted in coordination with regularly scheduled MPOAC meetings or other events as determined by the project team in consultation with and with the approval of the MPOAC Executive Director and the MPOAC Policy and Technical Subcommittee. Pilot testing sessions will be open to MPOAC members. Feedback from pilot test participants will be used to adjust content and delivery so as to maximize the learning experience of the full suite of training materials. Additionally, the pilot tests will give MPOAC members the opportunity to experience the training materials as they are being developed and to influence the final project product.

Deliverables:

✓ Three pilot tests of selected training modules
✓ Notices to MPOs across the state informing them of the opportunity to participate in the pilot testing of selected training modules
✓ Presentation materials (PowerPoint slides and handouts)
✓ Exercises and other interactive training materials
✓ Supplemental resource materials, as appropriate

Task 8: Strategies to Sustain the MPOAC Institute

- The project team will identify suitable funding mechanisms and organizational structures to sustain the continued implementation (including training delivery) of the MPOAC Institute.

Deliverables:

✓ Recommendation for delivery mechanisms for various training types (Weekend Institute, Half-Day Workshop, & Orientation)
✓ Recommendation for an organizational structure for continuing MPOAC Institute functions (training registration, training coordination, etc.)
✓ Recommendation for training delivery funding

Task 9: MPOAC Involvement

The MPOAC Policy and Technical Subcommittee will act as the Project Steering Committee and provide input during the life of the project. At least one member of the project team will meet with the Policy and Technical Subcommittee on a regular basis to review project progress and seek input and guidance as
needed. Additional meetings with the Project Steering Committee will be held as needed. Presentations on the progress of the project will be offered to the MPOAC Governing Board and Staff Directors Advisory Committee at regularly scheduled meetings. The MPOAC Executive Director will be responsible for day-to-day management of this project.

Deliverables:

✓ MPOAC Governing Board presentations (materials and presentations)
✓ MPOAC Staff Directors Advisory Committee meetings (materials and presentations)
✓ Project Steering Committee meetings (materials and presentations), as needed

Task 10: Project Management

The principal investigator will manage project activities to ensure timely and efficient completion of project deliverables. In addition, the principal investigator will coordinate ongoing project activities with the MPOAC Executive Director.

Deliverable:

✓ Quarterly invoices and progress reports and coordination with MPOAC Executive Director on project administration.

PROJECT SCHEDULE

This project will be completed by June 30, 2006.

During the final six months of the Phase II Project, the MPOAC should consider whether and how to proceed to a Phase III Project, including training delivery and module maintenance.

RESEARCH TEAM

The project will be completed by the Center for Urban Transportation Research (CUTR), Scott Paine, Ph.D. as a faculty affiliate of CUTR, and the Florida Conflict Resolution Consortium (CRC).

The CUTR Principal Investigator will be Jeff Kramer, AICP. Other contributing members of the CUTR research team include Ed Mierzejewski, Ph.D., P.E., Kristine Williams, AICP, Karen Seggerman, AICP and Scott Paine, Ph.D. Support staff and graduate students will also participate in the completion of work tasks.

The CRC Principal Investigator will be Hal Beardall, JD. The CRC research team will also include Bob Jones, JD and Tom Taylor, Ph.D. Support staff and graduate students may also assist in the completion of CRC work tasks.
PROJECT BUDGET

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<th>Expenses</th>
<th>$11,050</th>
<th>Travel</th>
<th>$11,022</th>
<th>Subtotal</th>
<th>$82,670</th>
<th>$94,473</th>
</tr>
</thead>
<tbody>
<tr>
<td>5% Indirect</td>
<td>$8,875</td>
<td>5% Indirect</td>
<td>$4,133</td>
<td>$4,724</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Project Total</td>
<td>$186,000</td>
<td>Project Total</td>
<td>$86,803</td>
<td>$99,197</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

The cost for performing this project is $186,000 over a two year period. Of that, $52,956 will be provided to the CRC to complete their responsibilities under this project scope. The remaining budget will be expended by staff affiliated with CUTR. The project team will include faculty, students and administrative support staff who will work directly on the project and whose costs are reflected in the direct costs of the project as listed above.

Quarterly invoices will be submitted throughout the project and be based on project completion. Invoices will be accompanied by a project progress report. The final Phase II training materials will accompany the final invoice.

**PROJECT MANAGEMENT AND OVERSIGHT**

The MPOAC Executive Director will be responsible for day-to-day management of this project. The MPOAC Policy and Technical Subcommittee will act as a Project Steering Committee and provide input during the life of the project.