

Appendix A: Freight Partnership Survey Questions and Summary Report

Survey Questions

FREIGHT PRIORITIES

1. How high a priority is freight transportation in your organization?

- Extremely
- Somewhat
- Neutral
- Not Very
- Not at All

1.a. If you answered “Not Very” or “Not at All” to Question 1, what factor(s) contribute to this?

- Lack of staff resources
- Lack of experienced and knowledgeable staff in the freight area
- Lack of management support
- Competing priorities
- Other (specify) _____

2. What high priority **freight** issues do you foresee in the next five to ten years for your State, region, or locality?

3. What high priority freight issues do you foresee in the next five to ten years for the Nation?

4. What are the top three priority **freight** initiatives in your State, region, or locality? Are they in the TIP/STIP? Are these priorities clearly articulated in the LRP?

Priority Freight Initiatives	In TIP/STIP	Articulated in the LRP
	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>

5. Does your organization have an individual in a leadership position who actively advances these priorities (i.e., a freight champion)?

Yes

If yes, what position does this champion hold and what is their sphere of influence?

Somewhat

If “somewhat,” what does this mean and how influential is this person?

No

If “no” do you have any idea why not?

6. Does the leadership in your organization recognize the importance of freight transportation needs in your State, region, or locality?

Yes

Somewhat

No

FREIGHT PLANS (only asked of MPO/Regional Council and State DOT respondents)

7. Does your organization have a Freight Plan or a freight element within your Long Range Transportation Plan?

- Yes
- In Progress
- No

8. Does your organization identify specific projects to address freight needs in your plan(s)?

- Yes
- In progress
- No

9. If you have a Freight Plan or are currently developing one, please provide the web address (if the Plan is available online) and point of contact.

Point of Contact: _____
Web Address: _____

FREIGHT PROFESSIONAL CAPACITY

10. How would you rate the level of capacity of your staff and organization to understand and address freight transportation needs in your State, region, or locality?

- Very High
- High
- Moderate
- Low
- Very Low

11. In which of the areas listed below do you believe you need additional expertise?
Please indicate both the level of training required and the delivery mechanism preferred.

Area of Expertise	Level of Training				Delivery Mechanism	
	Beginner	Intermediate	Advanced	Training Not Needed	Instructor-Led	Computer-Based
General freight planning	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Freight programming and project delivery	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Financing freight projects	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Freight forecasting	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Freight and land use	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Freight and environmental issues	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Freight and Safety	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Truck size and weight issues	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Urban freight issues	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Supply chain and freight logistics	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Engaging the private sector in Freight transportation planning	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Freight data & performance measures	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Designing highways for moving freight	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
System preservation and freight needs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
System performance & technology	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Intermodal freight logistics	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Modal freight operations (air, water, road, rail)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

12. What are your organization’s top three training needs related to freight? For each of these needs, what level of training is required? If your organization does not have any training needs you may leave this question blank.

Training Needs	Level of Training Required		
	Beginner	Intermediate	Advanced
	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

13. What are your organization’s top three technical assistance needs (e.g., developing a freight plan)? If your organization does not have technical assistance needs you may leave this question blank.

14. In general, what delivery mechanisms would you prefer in meeting your training and technical assistance needs?

	Least Preferred				Most Preferred
Conferences/Seminars	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
In-Person Training Courses	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
In-Person Workshops	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Instructor-Facilitated Web-Based Training/Technical Assistance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Self-Paced Computer Training (Web/CD Rom)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Informational Materials, Fact Sheets, Brochures	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Videoconferences	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Peer to Peer Exchange	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other (Specify)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

FREIGHT POLICY FRAMEWORK (only asked of MPO/Regional Council and State DOT respondents)

15. The need to develop a national freight policy was the highest priority at the 2005 Freight Transportation Partnership Conference in Columbus, Ohio. My organization is familiar with the Draft Framework for a National Freight Policy.

- Yes
- No
- Don't know

16. My organization is or is planning on implementing one or more of the strategies and tactics listed in the Framework for a National Freight Policy.

- Yes
- No
- Don't know

FOSTERING INSTITUTIONAL/OPERATIONAL CHANGE (only asked of MPO/Regional Council and State DOT respondents)

17. At the 2005 Freight Transportation Partnership Conference in Columbus, Ohio, attendees discussed institutional needs (including organization structure) for advancing freight. Please indicate which statement is most true with regard to a Freight Office/Section and your organization.

- My organization has a Freight Office/Section
- My organization is in the process of forming a Freight Office/Section
- My organization is planning to establish a Freight Office/Section
- Freight is included as a collateral duty in another Office/Section
- None of the above

FROM PLANNING TO PROJECT IMPLEMENTATION (only asked of MPO/Regional Council and State DOT respondents)

18. How successful has your State/MPO been in moving freight projects past the planning stage to implementation?

- Not at all
- For some projects
- About half of all projects
- For most projects
- For all projects

19. What do you need to be more successful in moving projects from planning to project development and delivery?

FREIGHT ADVISORY COUNCILS

20. What type of arrangement does your organization have for communication and coordination with the freight industry (e.g., industry, retail, carriers, modes, and other stakeholders)?

- Formal (e.g., freight advisory council)
- Informal on-going relationship
- None

21. Please indicate the formal freight advisory council(s) (and associated jurisdictions, e.g., city, State, county, or corridor/region) in which your organization participates. (Leave blank if NONE)

A freight advisory council provides a forum for the exchange of ideas and addressing of issues between the State DOT and/or MPO and the private sector to develop and promote a safe, reliable, efficient and environmentally responsible freight transportation system within a State or locality.

MULTI-JURISDICTIONAL FREIGHT COALITIONS

22. Do you have one or more multi-jurisdictional freight coalition(s) operating within your State?

NOTE: Multi-jurisdictional freight coalitions could be multi-state, statewide, regional (within a State), or locality based, please also indicate the geographic area and modal coverage (e.g. Baltimore Freight Movement Task Force—Baltimore City and Anne Arundel, Baltimore, Carroll, Harford and Howard counties, Maryland—Covering port activity, rail and truck transport or Upper Midwest Freight Coalition – seven States, rail, and highway).

- One
- More than one
- None
- Don't know

23. How would you rate the overall activity level of the multi-jurisdictional freight coalition(s) in your State, region, or locality?

- Nothing is happening.
- Not much happening – Collaboration and coordination activities of entities are episodic, inconsistent, and typically specific to events, projects, or problems, involve a few jurisdictions, and freight stakeholders, and are not maintained beyond the specific need.
- Emerging – The various collaboration and coordination activities of the coalition(s) are organized to address a limited set of specific ongoing issues and functions
- Growing – The various collaboration and coordination activities of the coalition(s) are reasonably comprehensive for addressing a wide range of multi-state, State, regional, or local freight issues and include many of the jurisdictions, and freight stakeholders.
- Mature – There is a mechanism (charter, MOU, agreement etc.) that ties organizations together as a coalition that includes key freight stakeholders. The Coalition(s) set expectations for freight transportation and is organized, on a continuing basis, to address a wide range of freight transportation systems management and operations issues and needs.

24. Please indicate the multi-jurisdictional freight coalition(s) (and associated jurisdictions, e.g., city, State, county, or corridor/region and modal coverage) in which your organization participates. (Leave blank if NONE)

MOVING AHEAD – STAYING AHEAD

25. What are the top three items your State, region, or locality could focus on to advance the level of collaboration and coordination with freight stakeholders? (Leave blank if Don't Know)

- a. _____
- b. _____
- c. _____

26. What can FHWA's Division Offices, Resource Center, and Headquarters Offices do to further support State DOT/MPO freight staff and activities?

27. What can AMPO/NARC/AASHTO do to further support MPO/State DOT freight activities?

Freight Partnership Survey - What Did We Learn?

Introduction

In January 2007, FHWA, AASHTO, AMPO, and NARC participated in a freight survey. This survey was disseminated to FHWA Division Offices by FHWA, State DOTs by AASHTO, and MPOs and Regional Councils by AMPO and NARC. The survey was developed in order to:

- Provide transportation stakeholders with a better understanding of what organizations are doing in freight transportation planning and implementation.
- Set a baseline to develop performance measures.
- Gather information to share best practices.
- Develop a list of Freight Advisory Councils.
- Compare State DOT and FHWA responses to a similar survey held in 2005.

Figure 1 shows the response percentage for each stakeholder group

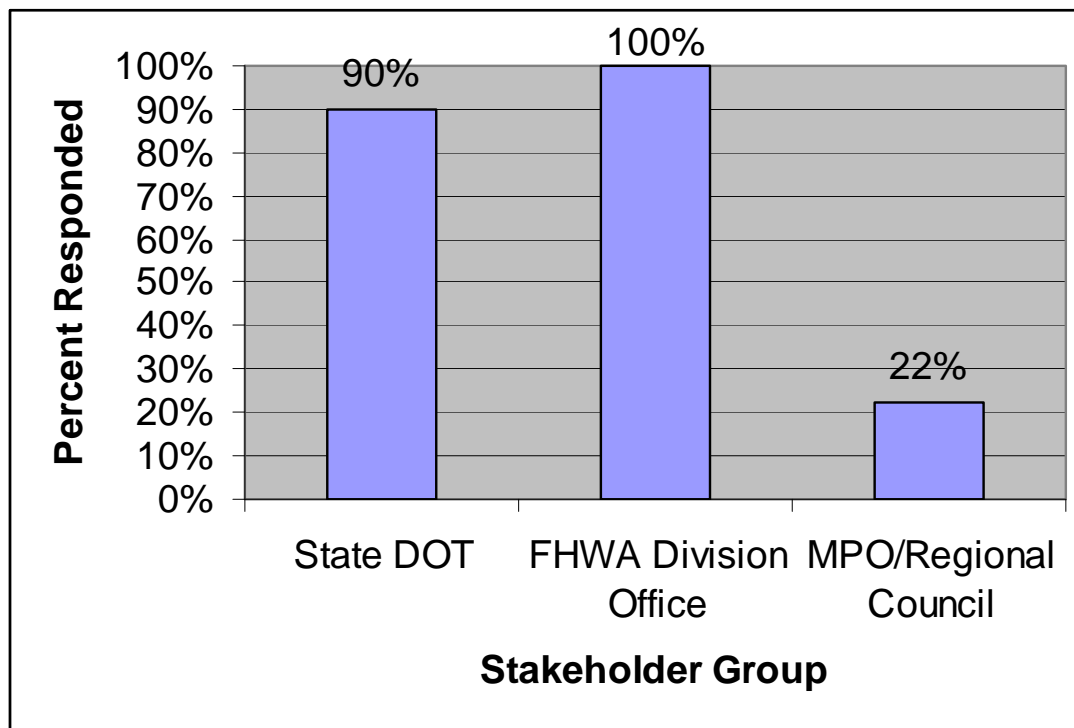


Figure 1 - Percentage of Survey Responses

Although the chart indicates that 100 percent of FHWA Division Offices responded, this number is likely not accurate, due to the fact that in some instances there were duplicate responses from a Division Office. Because the survey was anonymous there were limitations in being able to determine which offices may have responded more than once. However a careful review of the responses from each survey enabled us to estimate that the error is not greater than 5 additional surveys due to a duplication. Therefore the FHWA response rate is likely closer to 90 percent. All responses have been taken into account.

Survey Organization

The survey was divided into five sections that were geared toward all stakeholder respondent groups:

- Freight Priorities
- Freight Professional Capacity
- Freight Advisory Councils
- Multi-Jurisdictional Freight Coalitions
- Moving Ahead-Staying Ahead

There were four additional sections that the State DOTs and MPOs responded to:

- Freight Plans
- Freight Policy Framework
- Fostering Institutional/Operational Change
- From Planning to Project Implementation

What Did We Learn?

Summary

Overall, it seems that States, FHWA Division Offices, and MPOs/Regional Councils are making great strides in bringing freight to the forefront. The survey results indicate that most respondents view freight as a priority and are either in progress or planning to take on efforts to help improve freight movement for the future. When possible, data was compared to data from a 2005 survey and the numbers show that more organizations are now focused on freight and organizational leadership is increasingly dedicated to advancing freight transportation. However, the survey indicated that there is still a need for more freight training and technical assistance, with the level of training and technical assistance varying among the different respondent groups.

A common theme throughout the survey responses was the need for more information sharing and outreach. In addition to training and technical assistance needs, it is obvious that FHWA, States, and regions are not always aware of freight related activities at a national level, such as the Draft Framework for a National Freight Policy, or in their area, such as advisory groups and multi-jurisdictional coalitions. Information sharing and outreach was also a key theme of the comments heard during the Freight Partnership II Meeting in Natchez, Mississippi in February 2007.

The survey helped to bring to light the many existing freight advisory groups and multi-jurisdictional coalitions, as well as freight plans that either exist or are in development. This knowledge will be used to provide best practice information to States and regions that are looking to develop advisory groups and coalitions, as well as freight plans.

Freight Priorities

Between 2005 and 2007, freight has increasingly become a priority for FHWA Division Offices. In 2005 only 2% of FHWA Division Offices stated that freight is an extremely high priority to them. However, in 2007, this number increased to 26%.

While MPO/Regional Council numbers are not available for 2005, in 2007 25.88% of MPOs/Regional Councils reported freight to be a strong priority in their organization.

The State DOT response was a little different. In 2005, 41% of State DOTs reported freight to be an extremely high priority. However, in 2007, only 23% responded that freight is an extremely high priority. One explanation for this decline might be that in 2005 there were less State DOT survey respondents, a possible indicator that those who did respond were those States that were focusing on freight.

It is encouraging that across all three stakeholder groups, there were no “not at all” responses to the question of, “how high a priority is freight transportation in your organization?”, and the majority of the responses fell in the somewhat to extremely range.

FHWA, State DOTs, and MPOs/Regional Councils all identified congestion, commercial vehicle-related topics, intermodal connections/facilities, and rail-related topics as the high priority freight issues at a state-level for the next five to ten years (see Table 1). It is interesting to note that intermodal facilities ranked high as a priority issue, as this is a topic that was not even mentioned in the FHWA and State DOT responses to the 2005 survey.

Table 1 - High Priority Freight Issues for Your State/Region (listed in priority order)

FHWA	State DOT	MPO/Regional Council
<ul style="list-style-type: none"> • Congestion • Commercial Vehicles • Rail • Water/Ports • Intermodal Connections/ Planning/Facilities 	<ul style="list-style-type: none"> • Freight System Congestion/Capacity (All modes) • Expanding, Upgrading, Adapting Highway Infrastructure • Truck Size and Weight Issues • Intermodal Connections/Facilities • Access to Class 1RRs • Diverting Traffic to Rail 	<ul style="list-style-type: none"> • Commercial vehicles • Congestion • Rail • Intermodal connections/ planning/facilities • Operations/Capacity • Infrastructure

At a national level, the three respondent groups agreed that congestion and funding are high priority freight issues (see Table 2).

Table 2 - High Priority Freight Issues for the Nation (listed in priority order)

FHWA	State DOT	MPO/Regional Council
<ul style="list-style-type: none"> • Congestion • Operations/Capacity • Commercial Vehicles • Security • Funding/Resources 	<ul style="list-style-type: none"> • Capacity/Congestion/Chokepoints • Funding and Policy • Global Developments—NAFTA, Asia, Europe 	<ul style="list-style-type: none"> • Congestion • Operations/Capacity • Funding/Resources • Security • Commercial vehicles • Intermodal connections/ planning/facilities

It is important to note that congestion was the number one issue across all three respondent groups for the nation, and it ranked high for state/regional issues as well. This indicates that the USDOT is on track with its Congestion Initiative.

It is also interesting that environmental issues did not appear as a high priority for any of the respondent groups. Typically when speaking of freight, environment is a hot topic, and it is often heard that if environmental issues aren’t resolved then there is no chance of implementing freight projects. This element of the survey warrants further research.

When asked to identify the top three priority freight initiatives for the region or locality, the FHWA Division Offices and MPOs shared the view that congestion initiatives, road improvements, and rail projects are priority (see Table 3). Although State DOTs listed rail crossings/separations as a top priority, the other initiatives were slightly different, to include freight analyses and plans, TIP and STIP projects, size and weight changes, and intermodal freight facilities.

Table 3 - High Priority Freight Initiatives (listed in priority order)

FHWA	State DOT	MPO/Regional Council
<ul style="list-style-type: none"> • Rail Projects • Road Improvements • Congestion Initiatives • Port Projects • Corridor Development/ Enhancements 	<ul style="list-style-type: none"> • Freight Analyses and Plans • TIP and STIP Projects • Considering S&W Changes • Intermodal Freight Facilities • Rail Crossings/Separations 	<ul style="list-style-type: none"> • Road Improvements • Rail Projects • Freight Plan/Freight Study • Intermodal Facilities • Congestion Initiatives

The survey also asked if the high priority freight initiatives are included in the TIP/STIP or articulated in the long range plan (LRP). The FHWA Division Office and MPO/Regional Council response is shown in Table 4. Data for State DOTs is not available.

Table 4 - High Priority Freight Initiatives and the TIP/STIP and LRP

	FHWA	MPO/Regional Council
# of Initiatives Listed	114	186
Included in the TIP/STIP	51.75%	34.41%
Articulated in the LRP	66.67%	76.34%

Freight Professional Capacity

Although it seems that there is a constant demand for freight training and technical assistance, it is encouraging that the majority of FHWA, State DOT, and MPO/Regional Council respondents indicated that they are at least moderately equipped to understand and address freight transportation needs at a regional/state level (see Table 5).

Table 5 - Level of capacity to understand and address freight transportation needs at a regional/state level.

	FHWA	State DOT	MPO/Regional Council
Very High	2%	9.1%	10.67%
High	22%	25%	26.67%
Moderate	54%	47.7%	46.67%
Low	22%	11.4%	14.67%
Very Low	0%	6.8%	1.33%

For FHWA Division Offices, the level of capacity has greatly increased since the 2005 survey. In 2005, 16.3% FHWA respondents indicated that they had a very low level of capacity and 34.7% indicated that they had a low level of capacity. The State DOT responses have not changed greatly since 2005.

Both FHWA Division Offices and MPO/Regional Councils indicated that one of their top training needs for freight is on Engaging the Private Sector (see Table 6). Information for the State DOT needs is not available. However, as shown in Figures 2 and 3, the majority of FHWA respondents (54.55%) indicated that they need beginner level training for this topic, while the majority of MPO/Regional Council respondents (88.88%) indicated they need intermediate to advanced level training.

Table 6 - Top Training Needs Related to Freight (in priority order)

FHWA	MPO/Regional Council
<ul style="list-style-type: none"> • Engaging the Private Sector • Financing Freight Projects • General Freight Planning 	<ul style="list-style-type: none"> • Freight Forecasting • Freight Data and Performance Measures • Engaging the Private Sector • Freight Logistics (including Intermodal and Supply Chain)

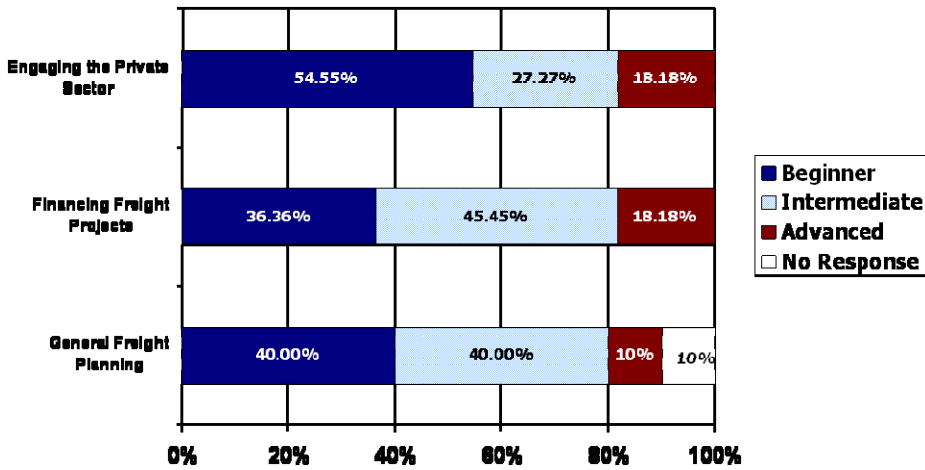


Figure 2 - Level of Training Required for Priority Training Topics (FHWA Response)

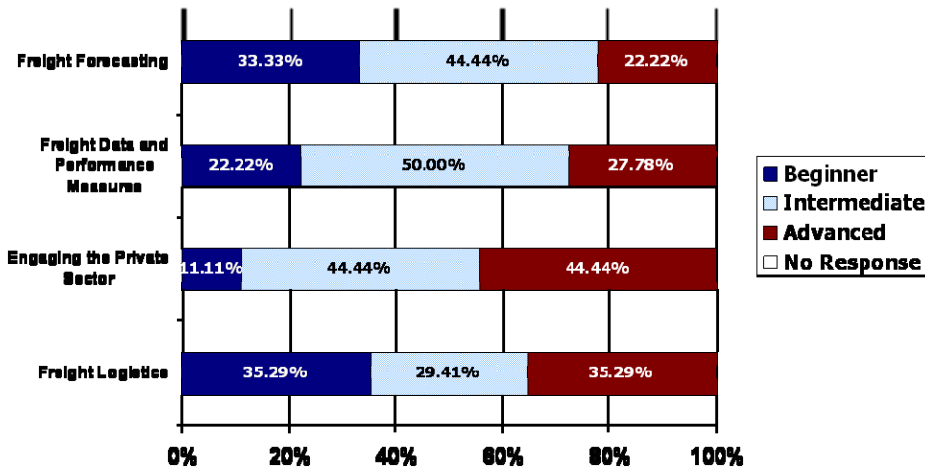


Figure 3 - Level of Training Required for Priority Training Topics (MPO/Regional Council Response)

Both FHWA Division Offices and MPO/Regional Councils indicated that they needed technical assistance in the areas of developing a freight plan and gathering comprehensive freight data (see Table 7). FHWA is responding to the need for freight plan assistance by developing a guidebook to help States and MPOs develop freight plans.

Table 7 - Top Technical Assistance Needs (in priority order)

FHWA	MPO/Regional Council
<ul style="list-style-type: none"> Developing a Freight Plan Developing Freight Performance Measures Gathering Comprehensive Freight Data 	<ul style="list-style-type: none"> Developing a Freight Plan Gathering Comprehensive Freight Data Freight Forecasting Freight Data Analysis, Tools, and Modeling

Both FHWA Division Office and MPO/Regional Council respondents indicated that in person workshops and training courses are the preferred method of providing training. Data is not available from the State DOTs. Peer to peer exchanges, web based training, and conferences/seminars also ranked high among the two groups, all receiving a score above 3 on a scale of 1 to 5, with 1 being least preferred and 5 being most preferred.

Freight Policy Framework

The State DOT and MPO/Regional Council respondents were asked several questions regarding the Draft Framework for a National Freight Policy. The responses indicated that while the majority of State DOT respondents (61.4%) are aware of the policy framework, the majority of MPO/Regional Council respondents (60%) are not. This shows the need for more marketing of the framework outside of the AASHTO/FHWA realm.

When it comes to actually implementing strategies, tactics, and activities within the framework, the majority of both State DOT and MPO/Regional Council respondents indicated that they do not know if their organization intends on taking an active role in the framework (see Table 8). This may also be the result of not enough marketing of the framework and a limited understanding of what it means to take ownership of strategies, tactics, or activities.

Table 8 - Implementing Strategies/Tactics/Activities from the Framework

	State DOT	MPO/Regional Council
Yes	27.3%	24%
No	18.2%	26.7%
Don't Know	54.5%	49.33%

The Freight Partnership II meeting in Natchez, MS in February 2007 included a session on the policy framework, with the intent of educating participants about the framework and encouraging them to take ownership.

Fostering Institutional/Operational Change

In terms of having someone in a leadership position (i.e., a freight champion) that actively advances the freight priorities, the majority of respondents for all three respondent groups answered yes or somewhat (see Table 9).

Table 9 - Does your office have someone in a leadership position who actively advances freight priorities?

	FHWA	State DOT	MPO/Regional Council
Yes	24.53%	34.1%	29.41%
Somewhat	47.17%	31.8%	42.35%
No	28.30%	34.1%	28.24%

Even better, when asked if the leadership in your organization recognizes the importance of freight transportation needs in your State, region, or locality, the majority of respondents in all three groups answered yes and very few respondents answered no (see Table 10).

Table 10 - Does the leadership in your organization recognize the importance of freight transportation needs in your State, region or locality?

	FHWA	State DOT	MPO/Regional Council
Yes	58.49%	56.8%	61.18%
Somewhat	39.62%	40.9%	36.47%
No	1.89%	2.3%	2.35%

The State DOTs and MPO/Regional Councils were further asked if their organization has a freight office or section. This was a follow-up to the Freight Partnership I meeting held in Columbus, Ohio in March 2005 in which participants discussed institutional needs for advancing freight. The most common answer among State DOT and MPO/Regional Council respondents was that freight is included as a collateral duty in another office or section (see Table 11). The next most common answer was “none of the above”, which most likely indicates that there is no freight office or section, there are no plans to develop such an office or section, and freight is not even considered as a collateral duty. However, it is encouraging that 18.2% of State DOTs and 13.33% of MPO/Regional Councils indicated that they do have a freight office or section.

Table 11 – Implementation of a Freight Office/Section

	State DOT	MPO/Regional Council
Has a Freight Office/Section	18.2%	13.33%
In Process of Forming a Freight Office/Section	2.6%	4%
Planning to Establish a Freight Office/Section	4.5%	2.67%
Included as a Collateral Duty in another Office/Section	54.5%	45.33%
None of the Above	20.5%	34.67%

Further analysis was done to see if whether or not an organization has a freight champion corresponds with whether or not they have a freight office/section. This analysis was completed only for the MPO/Regional Council data as the State DOT data was not available. The analysis showed that 60% of organizations that have a freight office or section also have a freight champion, while only 20% of those without a freight office/section or freight included as a collateral duty have a champion (see Figure 4). Similarly, 80% of respondents who have a freight office or section also responded that their leadership recognizes the importance of freight, while in those organizations that either don't have a freight office/section or do not include freight as a collateral duty only 56% said their leadership recognizes the importance of freight (see Figure 5).

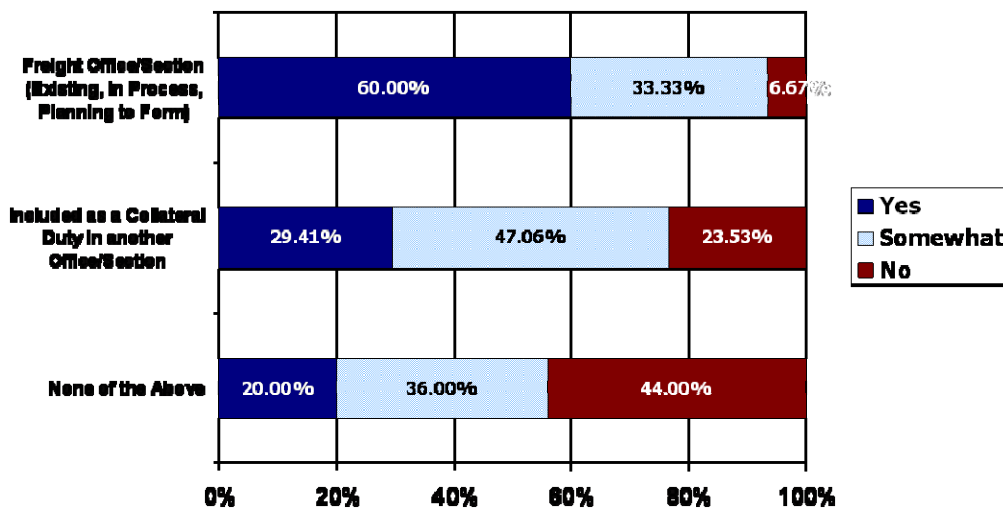


Figure 4 - Institutional Structure and Freight Champions

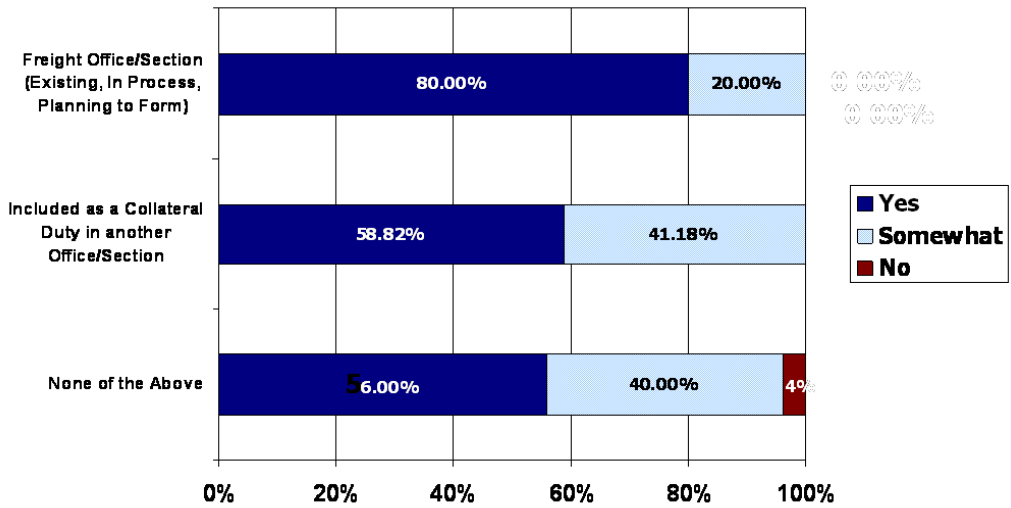


Figure 5 - Institutional Structure and Leadership Recognition of Freight

Although the analysis shows that having a freight champion and leadership that recognizes the importance of freight directly correlates with having a freight office/section, there are still a fair percentage of organizations that have a champion or recognize freight as being important even without having an institutional body for freight.

Analysis was also done with the MPO/Regional Council data to determine if the level of freight capacity correlates with whether or not an organization has a freight office or section. As assumed, those organizations with freight offices or sections had a higher level of freight capacity than those that do not have freight offices or sections (see Figure 6).

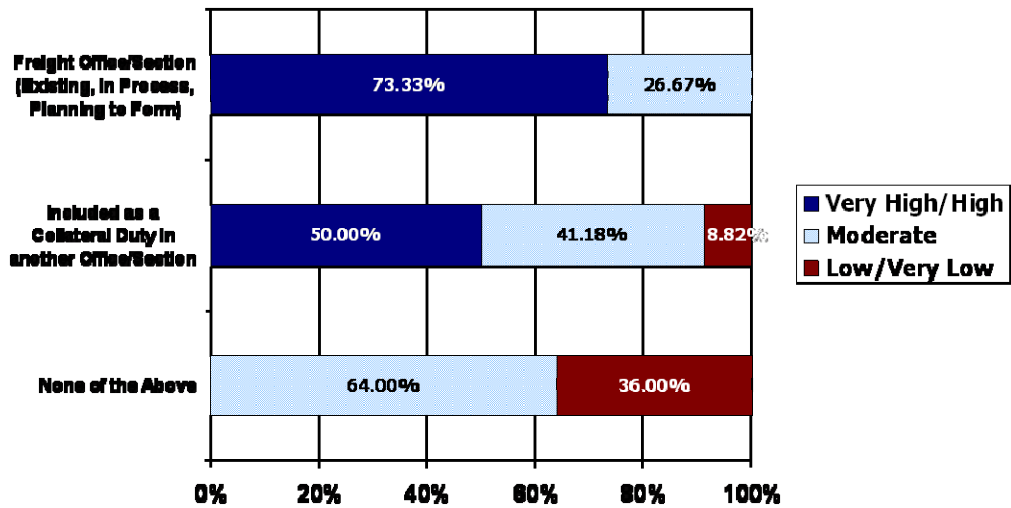


Figure 6 - Institutional Structure and Freight Capacity

The bottom line from this data is that organizations that are specifically focused on freight are more likely to understand freight movement and have champions or leadership that will advance freight movement. More organizations need to be encouraged to implement freight specific offices or sections in order to advance freight. There is an opportunity for technical assistance and peer to peer exchanges that will enable those organizations that are institutionally set up to focus on freight to educate other organizations on how to start freight offices/sections. However, it is also important to keep in mind that not every region

in the country is impacted by freight in the same way and therefore there is possibly a good reason why freight isn't handled the same way in every organization.

Freight Plans

In terms of freight plans, the State DOTs and MPO/Regional Councils were asked slightly different questions. The FHWA survey did not include questions on this topic.

The State DOTs were asked if their organization identifies specific projects to address freight needs in their plan(s). 40.9% of respondents said yes, 34.1% said no, and 25% said in progress. Figure 7 illustrates the response.

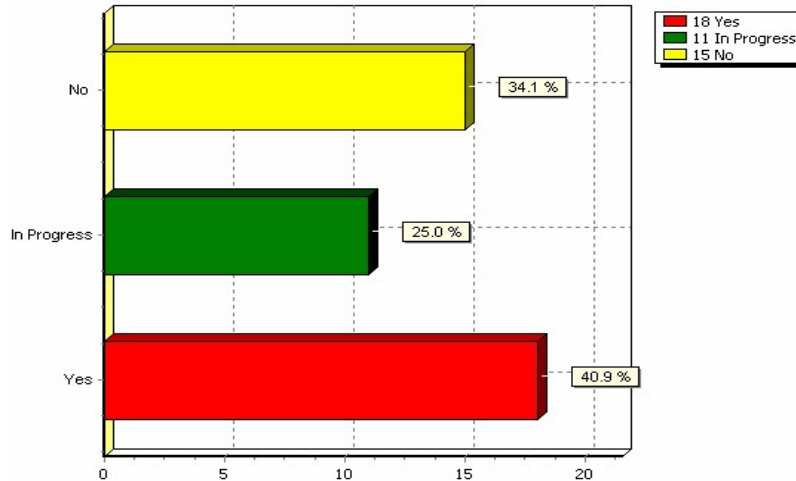


Figure 7 - Does your organization identify specific projects to address freight needs in your plan(s)? (State DOTs only)

The MPOs/Regional Councils were asked if their organization has a freight plan or freight element in their long range transportation plan. 54.76% responded yes, 27.38% responded in progress, and 17.86% responded no. Figure 8 illustrates the response.

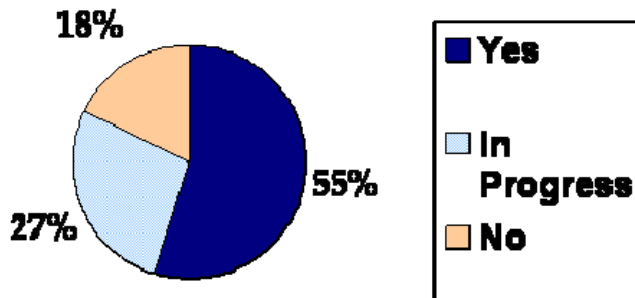


Figure 8 – Does your organization has a freight plan or freight element in their long range transportation plan? (MPOs/Regional Councils only)

It is encouraging that the majority of State DOTs and MPOs/Regional Councils are including freight in their planning efforts, or are at least working on including freight in these efforts.

From Planning to Project Implementation

Although most States and MPO/Regional Councils seem to be including freight in their planning efforts, the majority of States and MPO/Regional Councils said they were successful in moving only some projects to the implementation stage (see Table 12). Based on the scale used in the survey, it is assumed that some means less than half of all projects. However, the next highest percentage for both States and MPO/Regional Councils was no projects. This is an indicator that although respondents are increasingly viewing freight as a priority and are starting to develop the institutional underpinnings to advance freight movement, there is still much to be done in order to actually implement freight projects.

Table 12- Success in Moving Freight Projects from Planning to Implementation

	State DOT	MPO/Regional Council
All	4.5%	0%
Most	11.4%	12%
Half	4.5%	2.67%
Some	61.4%	64%
None	18.2%	21.33%

The MPO/Regional Council respondents indicated that the following is needed in order to be more successful in implementing freight projects:

- Funding/Resources
- Better understanding of freight projects/needs
- Freight industry involvement

Funding/resources is a theme that was seen throughout the survey and indicates that States and MPO/Regional Councils may need more education on innovative financing mechanisms, as well as how to develop public/private partnerships that can help pay for freight projects.

Freight Advisory Councils

Most States, FHWA Division Offices, and MPO/Regional Councils reported that they have an informal on-going arrangement for communicating and coordinating with the freight industry (see Table 13). More MPO/Regional Councils and FHWA respondents than State respondents indicated that they had no arrangement; however, the majority response for all respondents was either an informal or formal relationship. The fact that some respondents indicated they had no arrangement for communication with the freight industry needs to be further investigated, as almost all States should have some sort of freight advisory council in existence. Because this survey was anonymous, it is difficult to tell if those states that reported that they have no communication/coordination arrangement are states in areas where freight does not play a strong role.

Table 13 - Type of Arrangement for Communication and Coordination with the Freight Industry

	FHWA	State DOT	MPO/Regional Council
Formal	12%	25%	31.08%
Informal	52%	70.5%	47.30%
None	36%	4.5%	21.62%

Multi-Jurisdictional Freight Coalitions

Most States, FHWA Division Offices, and MPO/Regional Councils also reported that they have one or more multi-jurisdictional coalitions operating in their State (see Table 14). However, a large number of FHWA Division Offices and MPO/Regional Councils also indicated that they do not know if such coalitions exist in their State, indicating that more marketing and outreach may be needed by these coalitions. Furthermore, since the numbers do not exactly match up among the three respondent groups, especially

for the “none” response, it is likely an indication that there is not always a strong awareness of the existence of multi-jurisdictional freight coalitions.

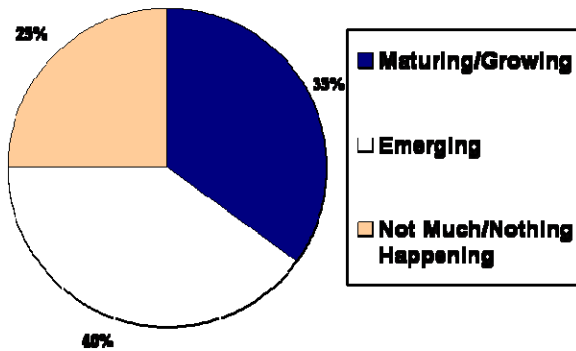
Table 14 - Number of Multi-Jurisdictional Freight Coalitions Operating in the State

	FHWA	State DOT	MPO/Regional Council
One	34.69%	27.3%	16.44%
More than One	20.41%	29.5%	26.03%
None	18.37%	34.1%	10.96%
Don't Know	26.53%	9.1%	46.58%

When asked about participation in multi-jurisdictional freight coalitions, the majority of FHWA and MPO/Regional Council respondents indicated they do not participate in any such coalitions. Data for the States is not available.

In addition, when asked about the activity level of the multi-jurisdictional coalitions, a significant number of States, FHWA, and MPO/Regional Council respondents indicated that nothing or not much is happening. However, this question was asked of all respondents, not just those who said they participated in a coalition. Further analysis shows that when only looking at those respondents who indicated that they participate in a multi-jurisdictional freight coalition, then the responses leaned toward the activity level being emerging or maturing/growing (see Figures 9 and 10).

One or More Coalitions



No Coalitions

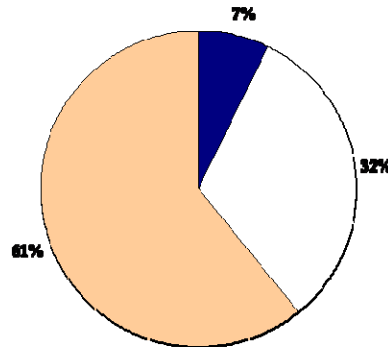


Figure 9 - Coalition Activity Level Compared to Coalition Participation (FHWA Responses)

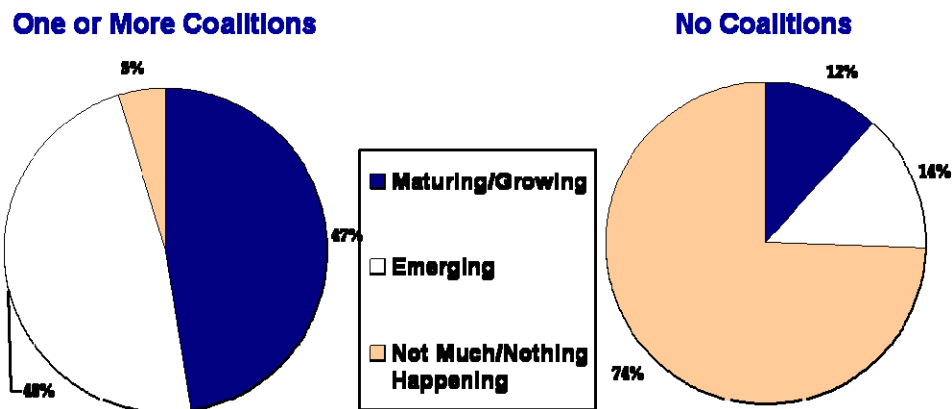


Figure 10 - Coalition Activity Level Compared to Coalition Participation (MPO/Regional Council Responses)

Moving Ahead-Staying Ahead

At the conclusion of the survey, respondents were asked what FHWA, AASHTO, AMPO, and NARC can do to further support freight staff and activities. Responses were unanimous that training, technical assistance, education, and outreach is strongly needed from all involved organizations. Other common responses included assistance with data collection and analysis and more funding opportunities.

The training/technical assistance topic was addressed in the Freight Partnership II meeting and will continue to be addressed. The Freight Partnership II meeting also addressed the topics of data collection and funding and these topics will be explored as possible areas for training and technical assistance from FHWA, AASHTO, AMPO, and NARC.