

**Lee County Board Of County Commissioners  
Agenda Item Summary**

**Blue Sheet No. 20040838**

**1. REQUESTED MOTION:** Approve Amendment to Cooperative Agreement with Federal Highway Administration, The Florida Department Of Transportation to extend the period of performance for Heavy Vehicle Post-Implementation Data Collection to expire February 28, 2005, and approve authorizing resolution for Chairman to execute agreement.

**WHY ACTION IS NECESSARY:** Requires BOCC approval for amendment to agreement.

**WHAT ACTION ACCOMPLISHES:** Allows DOT to continue with data collection and reporting of the impact of Variable Pricing for Heavy Vehicles on traffic flow.

**2. DEPARTMENTAL CATEGORY:**  
**COMMISSION DISTRICT #**

*C9B*

**3. MEETING DATE:**

*07-27-2004*

**4. AGENDA:**

- CONSENT
- ADMINISTRATIVE
- APPEALS
- PUBLIC
- WALK ON
- TIME REQUIRED:

**5. REQUIREMENT/PURPOSE:**  
*(Specify)*

- STATUTE
- ORDINANCE
- ADMIN.
- CODE
- OTHER

**6. REQUESTOR OF INFORMATION:**

- A. COMMISSIONER     All
- B. DEPARTMENT     DOT
- C. DIVISION

BY: Scott M. Gilbertson, Dir.

**7. BACKGROUND:** The Board approved the original tri-party agreement on 8-29-2000, blue sheet # 20000845, Item 9B, between FHWA, FDOT, and Lee County to expand the Variable Pricing Program and electronic toll collection to Heavy Vehicles. The extension is to provide additional time for evaluation of the impact of Variable Pricing for Heavy Vehicles on traffic flow. The additional time is needed to allow the effect of new equipment being purchased for automatic vehicle classification to be analyzed.

**8. MANAGEMENT RECOMMENDATIONS:** Approve the agreement.

**9. RECOMMENDED APPROVAL:**

A Department Director	B Purchasing or Contracts	C Human Resources	D Other	E County Attorney	F Budget Services				G County Manager
<i>6/24/04</i> <i>[Signature]</i>	<i>[Signature]</i>	NA		<i>[Signature]</i>	OA	OM	Risk	GC	<i>[Signature]</i> <i>6-25-04</i>

**10. COMMISSION ACTION:**

- APPROVED
- DENIED
- DEFERRED
- OTHER

Rec. by CoAtty  
Date: *6/24/04*  
Time: *4:19 PM*  
Forwarded To:  
*Co. Admin*  
*6/24/04*

RECEIVED BY  
COUNTY ADMIN: *[Signature]*  
*6/24/04*  
*4:30 PM*  
COUNTY ADMIN  
FORWARDED TO: *[Signature]*  
*7/6/04*  
*3:30*

**AMENDMENT TO COOPERATIVE AGREEMENT BETWEEN THE FEDERAL  
HIGHWAY ADMINISTRATION, THE FLORIDA DEPARTMENT  
OF TRANSPORTATION, AND THE LEE COUNTY BOARD OF COUNTY  
COMMISSIONERS FOR HEAVY VEHICLE IMPLEMENTATION AND  
POST-IMPLEMENTATION DATA COLLECTION**

When signed by the Federal Highway Administration, the State of Florida, Department of Transportation and Lee County Board of County Commissioners in the places provided below, the following shall constitute the Second amendment to that certain original "Agreement" dated December 1, 2000 between the above parties, as amended by the First Amendment thereto dated January 14, 2002, as in force immediately prior to the execution of this Second Amendment:

1. All expressions used herein, unless herein separately defined, shall have the same meaning herein as in the Agreement.

2. The Schedule paragraph of the Agreement (page 2) is amended by deleting the first sentence and adding the following first sentence to said paragraph:

"The period of performance for Heavy Vehicle Post-Implementation Data Collection shall expire February 28, 2005."

Except as expressly or by necessary implication modified hereby, all provisions of the Agreement shall remain in full force and effect in accordance with their terms but in the event of any inconsistency(ies) between the provisions of the Agreement and the provision hereof, the latter shall prevail.

This Amendment shall become effective immediately upon execution by all parties to the Agreement.

Federal Highway Administration

\_\_\_\_\_  
Division Administrator

\_\_\_\_\_  
Date

Florida Department of Transportation

\_\_\_\_\_  
District Secretary

\_\_\_\_\_  
Date

Lee County

\_\_\_\_\_  
Chairman, Board of County Commissioners

\_\_\_\_\_  
Date

Approved As To Form:

\_\_\_\_\_  
County Attorney's Office

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OF TRANSPORTATION, AND THE LEE COUNTY BOARD OF COUNTY  
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Federal Highway Administration

\_\_\_\_\_  
Division Administrator

\_\_\_\_\_  
Date

Florida Department of Transportation

\_\_\_\_\_  
District Secretary

\_\_\_\_\_  
Date

Lee County

\_\_\_\_\_  
Chairman, Board of County Commissioners

\_\_\_\_\_  
Date

Approved As To Form:

\_\_\_\_\_  
County Attorney's Office

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Federal Highway Administration

\_\_\_\_\_  
Division Administrator

\_\_\_\_\_  
Date

Florida Department of Transportation

\_\_\_\_\_  
District Secretary

\_\_\_\_\_  
Date

Lee County

\_\_\_\_\_  
Chairman, Board of County Commissioners

\_\_\_\_\_  
Date

Approved As To Form:

\_\_\_\_\_  
County Attorney's Office

**AMENDMENT TO COOPERATIVE AGREEMENT BETWEEN THE FEDERAL  
HIGHWAY ADMINISTRATION, THE FLORIDA DEPARTMENT  
OF TRANSPORTATION, AND THE LEE COUNTY BOARD OF COUNTY  
COMMISSIONERS FOR HEAVY VEHICLE IMPLEMENTATION AND  
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This Amendment shall become effective immediately upon execution by all parties to the Agreement.

Federal Highway Administration

\_\_\_\_\_  
Division Administrator

\_\_\_\_\_  
Date

Florida Department of Transportation

\_\_\_\_\_  
District Secretary

\_\_\_\_\_  
Date

Lee County

\_\_\_\_\_  
Chairman, Board of County Commissioners

\_\_\_\_\_  
Date

Approved As To Form:

\_\_\_\_\_  
County Attorney's Office

216028

*Tri party agreement*

LEE COUNTY BOARD OF COUNTY COMMISSIONERS  
AGENDA ITEM SUMMARY

BLUE SHEET NO: 20000845

**1. REQUESTED MOTION:** Request approval of tri-party agreement between FHWA, FDOT and Lee County and authorize Chairman to execute agreement with any minor modifications from FHWA and FDOT. The grant is for expansion of the Variable Pricing Program to heavy vehicles in the amount of \$1,295,000. Also, amend CIP to add this project and approve transfer from reserves in the amount of \$129,500 for local match.

**WHY ACTION IS NECESSARY:** Requires BOCC approval on all contracts and amendments to the Capital Improvement Program.

**WHAT ACTION ACCOMPLISHES:** Obligates \$1,036,000 of Federal funds from FHWA Section 1216 of the Transportation Equity Act for the 21<sup>st</sup> Century (TEA-21) to FDOT and Lee County.

**2. DEPARTMENTAL CATEGORY:**  
COMMISSION DISTRICT #: CW

9B

**3. MEETING DATE:**

8-29-2000

**4. AGENDA**

- CONSENT
- ADMINISTRATIVE
- APPEALS
- PUBLIC
- TIME REQUIRED: 15 Minutes

**5. REQUIREMENT/PURPOSE**

- (Specify)
- STATUTE \_\_\_\_\_
  - ORDINANCE \_\_\_\_\_
  - ADMIN. CODE \_\_\_\_\_
  - OTHER \_\_\_\_\_

**6. REQUESTOR OF INFORMATION**

- A. COMMISSIONER: John Albion
- B. DEPARTMENT: Transportation
- C. DIVISION: Administration
- BY: Scott Gilbertson, Director

**7. BACKGROUND:**

In accordance with Section 1216 of the Transportation Equity Act for the 21<sup>st</sup> Century (TEA-21), Lee County proposes to enter into a three party agreement with Federal Highway Administration (FHWA) and the Florida Department of Transportation (FDOT) to expand the Variable Pricing Program and electronic toll collection to heavy vehicles.

The total project cost is estimated at \$1,295,000 with an 80/10/10 FHWA, FDOT and Lee County matching share, respectfully.

In addition to executing the agreement, the Board is requested to approve a transfer of funds from Gas Tax Reserves in the amount of \$129,500 to fund Lee County's 10% matching share.

CC: PROTECT MGR.  
FISCAL  
PROJECT FILE

**8. MANAGEMENT RECOMMENDATIONS:**

9. R

DEPARTMENT DIRECTOR	Purchasing	Human Resources	County Administration				OTHER	COUNTY ATTORNEY	COUNTY MANAGER
8/16/00 <i>[Signature]</i>			OM 8/17/00	Risk 8/17/00	AGG 8/17/00		For scheduling 8/17/00	8/17/00 <i>[Signature]</i>	

**10. COMMISSION ACTION:**

- APPROVED
- DENIED
- DEFERRED
- OTHER

RECEIVED BY  
COUNTY ADMIN.  
8/17/00  
9:30 AM  
COUNTY ADMIN.  
FORWARDED TO: *[Signature]*

RECVD.  
by CO. ATTY.  
9:05 AM  
8-17-00  
CO. ATTY.  
FORWARDED TO:  
8-17-00

WALK ON #5

LEE COUNTY BOARD OF COUNTY COMMISSIONERS  
AGENDA ITEM SUMMARY

BLUE SHEET NO: 20001229

**1. REQUESTED MOTION:** Adopt Resolution to enter into Tri-Party Agreements for Heavy Vehicle Variable Pricing Grant.  
**WHY ACTION IS NECESSARY:** Required by Florida Department of Transportation.  
**WHAT ACTION ACCOMPLISHES:** Continues Lee County's commitment to comply with Federal and State Guidelines.

**2. DEPARTMENTAL CATEGORY:**  
COMMISSION DISTRICT #: 02

**3. MEETING DATE:**

11-21-2000

**4. AGENDA**

CONSENT  
 ADMINISTRATIVE  
 APPEALS  
 PUBLIC  
TIME REQUIRED: 15 Minutes

**5. REQUIREMENT/PURPOSE**

(Specify)  
 STATUTE \_\_\_\_\_  
 ORDINANCE \_\_\_\_\_  
 ADMIN. CODE \_\_\_\_\_  
 OTHER \_\_\_\_\_

**6. REQUESTOR OF INFORMATION**

A. COMMISSIONER:  
B. DEPARTMENT: Transportation  
C. DIVISION: Administration  
BY: Scott Gilbertson, Director

**7. BACKGROUND:**

On August 29, 2000 the BOCC approved the Tri-Party Agreement for expansion of variable pricing to heavy vehicles between Lee County, Florida Department of Transportation and the Federal Highway Administration. However, resolutions were not prepared and submitted for Board approval. The Florida Department of transportation requires authorizing resolutions prior to executing agreements.

CC: PROJECT MGR.  
FISCAL  
PROJECT FILE

**8. MANAGEMENT RECOMMENDATIONS:**

**9. RECOMMENDED APPROVAL**

DEPARTMENT DIRECTOR	Purchasing	Human Resources	County Administration				OTHER	COUNTY ATTORNEY	COUNTY MANAGER
11/17/00			DA	OM	Risk	GC	11/17/00		

**10. COMMISSION ACTION:**

APPROVED  
 DENIED  
 DEFERRED  
 OTHER

RECEIVED BY  
COUNTY ADMIN.  
11/17/00  
10:30am  
COUNTY ADMIN.  
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10:15 AM

11/17/00  
10:09 AM  
CO. ATTY  
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Budget  
10:15 AM

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PROJECT NUMBERS 409185 1 28 01  
409186 1 28 01  
CONGESTION PRICING PROGRAM

COOPERATIVE AGREEMENT

BETWEEN

THE FEDERAL HIGHWAY ADMINISTRATION

THE FLORIDA DEPARTMENT OF TRANSPORTATION

THE LEE COUNTY BOARD OF COMMISSIONERS

STUDY GRANT AGREEMENT

FOR

A FEASIBILITY STUDY OF QUEUE JUMPS

AND

A PRE-IMPLEMENTATION STUDY OF VALUE PRICING FOR HEAVY  
VEHICLES

August 30, 2000

The Federal Highway Administration (FHWA), pursuant to Section 1216 (a) of the Transportation Equity Act for the 21<sup>st</sup> Century (TEA-21) hereby enters into a cooperative agreement with the State of Florida operating through the Florida Department of Transportation and the Lee County Board of Commissioners to conduct a feasibility study and a pre-implementation study. This agreement may incorporate more than one Value Pricing Pilot study. The Scope of Work for each study proposed shall be approved by FHWA. Particular studies to be undertaken through this Cooperative Agreement include a feasibility study of Queue Jumps in Lee County and a Pre-Implementation Study of Value Pricing for Heavy Vehicles on the Bridges in Lee County according to the sketch plans attached hereto as Exhibits A & B, and by this reference made a part hereof. Additional studies may be added with FHWA approval and as funding allows.

Estimated Cost/Funding

The State shall be reimbursed for allowable costs incurred in the performance of work under this cooperative agreement in an amount NOT TO EXCEED \$913,280 Federal Value Pricing Pilot Program funds (\$309,280 for the Queue Jumps Feasibility Study and \$604,000 for the Heavy Vehicles Pre-Implementation study). The total project cost for the Queue Jumps Feasibility Study is \$386,600 and the total project pre-implementation study cost for the Heavy Vehicles Study is \$755,000. Total Federal Funds in the amount of \$309,280 for the Queue Jumps Study and \$604,000 for the Heavy Vehicles Pre-Implementation study are requested by the State and Lee County. Total project implementation costs for the Heavy Vehicles Study are \$535,000; Federal Funds of \$428,000 will be requested by the State and Lee County for this portion of the project, however, Federal Funds for this portion of the study is not provided



at this time. No funds shall be spent on the project implementation phase until Federal Funds are provided in the amount of \$428,000.00. This satisfies the minimum 80/10/10 (Federal/State/Local) funding match required under this program. Reimbursement for costs incurred will follow regular Federal-aid billing and payment procedures.

#### Responsibilities of the State/County Coalition:

To carry out this project, the Florida Department of Transportation and Lee County shall enter into a Local Agency Program (LAP) Agreement as necessary to accomplish the tasks contained in the Scopes of Work developed for the attached sketch plans.

#### Schedule:

The period of performance for the Queue Jumps Feasibility Study shall be 15 months after the effective date of this cooperative agreement. The period of performance for the Heavy Vehicles Pre-Implementation Study shall be 12 months after the effective date of this cooperative agreement.

#### FHWA Participation

The FHWA shall be considered a full participant in the project. As such, the agency shall be a member of appropriate project management committees as they develop. The FHWA shall be provided the opportunity for membership on all subcommittees, working groups, task forces, and other such groups related to the project. The FHWA will provide names, addresses, and telephone numbers of committee representatives to the Florida Department of Transportation/Lee County program manager.

#### Reporting Requirements

Every three months, the State of Florida and Lee County shall submit to FHWA a project progress report, which briefly summarizes work accomplished, work planned, problems encountered, expenditures, recommended solutions, and any other pertinent information. Copies of all project reports, correspondence, meeting announcements, and other documents shall be supplied directly to the FHWA Division Administrator. The FHWA will provide names and addresses of specific individuals to receive these documents.

#### Programmatic Changes

The State of Florida Department of Transportation and Lee County must obtain the prior approval of FHWA whenever any significant change is anticipated. These include, but are not limited to:

1. Changes in overall budget.
2. Any revision of the scope, goals, objective or tasks Scope of Work or related activities (regardless of whether there is an associated budget revision requiring prior approval)
3. Changes in key personnel.

#### Intellectual Property

Intellectual property consists of copyrights, patents, and any other form of intellectual property rights covering any databases, software, inventions, training manuals, systems design or other proprietary information in any form or medium.

A. Copyrights: The FHWA reserves a royalty-free, nonexclusive and irrevocable license to reproduce, publish or otherwise use, and to authorize others to use, for Federal Government purposes:

- The copyright in any works developed under this agreement, or under a subgrant or contract under this agreement; and

- Any rights of copyright to which the State/County, its subgrantee or contractor purchases ownership with Federal financial assistance provided by this agreement.

B. Patents: Rights to inventions made under this agreement shall be determined in accordance with 37 C.F.R. Part 401. The standard patent rights clause at 37 C.F.R. Section 401.14 as modified below is hereby incorporated by reference.

- The terms "to be performed by a small business firm or domestic non-profit organization" shall be deleted from paragraph (g) (1) of the clause,
- Paragraphs (g) (2) and (g) (3) of the clause shall be deleted, and
- Paragraph (1) of the clause, entitled "Communications" shall read as follows: "(1) Communications. All notifications required by this clause shall be submitted to the FHWA Division office."

#### Costs

The State of Florida and Lee County shall limit its progress claims and final claims to those costs incurred in accordance with this Cooperative Agreement, and shall submit its final claim within 90 days after the project is completed.

#### Additional Requirements

The State and County shall comply with all applicable laws, regulations and FHWA requirements, including but not limited to 49 C.F.R. Parts 18, 20, 21, 27, and 29.

#### Certification Regarding Lobbying

The State of Florida and Lee County makes the certification regarding lobbying which is attached hereto as Appendix A.

#### Termination

Either party may terminate this agreement with 30 days written notice.

#### Effective Date

This agreement may be executed in counterparts with all of the signatures of the requesting parties thereby constituting a completed grant agreement and shall become effective upon execution by all parties hereto.

#### Length of Cooperative Agreement/Expiration of Funds

Since the studies included in this Cooperative Agreement have not reached the implementation phase, the beginning of the three-year funding limit contained in Section 1012(b)(2) of the Intermodal Surface Transportation Act of 1991 has not yet commenced. In the future, when the State of Florida receives funding for the implementation phase of the Heavy Vehicles Sketch Plan under this agreement, the three-year funding limit would commence at the time the project is approved for implementation.

Federal Highway Administration

*Patricia A. Bauer*

for Division Administrator

9-20-00

Date

Florida Department of Transportation

*[Signature]*  
Title

12/1/00

Date

Lee County

*[Signature]*  
Title

John E. Albion, Chairman, Board of County Commissioners

8/29/00

Date

APPROVED AS TO FORM

*[Signature]*  
OFFICE OF COUNTY ATTORNEY

## CERTIFICATION REGARDING LOBBYING

By execution of this Cooperative Agreement, the undersigned certifies, to the best of his or her knowledge and belief, that:

- (1) No Federal appropriated funds have been paid or will be paid, by or on behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with the awarding of any Federal contract, the making of any Federal grant, the making of any Federal loan, the entering into any partnership agreement, and the extension, continuation, renewal, amendment, or modification of any Federal contract, grant, loan, or partnership agreement.
- (2) If any funds other than Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this Federal contract, grant, loan, or partnership agreement, the undersigned shall complete and submit Standard Form-LLL, "Disclosure Form to Report Lobbying," in accordance with its instructions.
- (3) The undersigned shall require that the language of this certification be included in the award documents for all subawards at all tiers (including subcontracts, subgrants, and contracts under grants, loans, and partnership agreements) and that all sub-recipients shall certify and disclose accordingly.

This certification is a material representation of fact upon which reliance was placed when this transaction was made or entered into. Submission of this certification is a prerequisite for making or entering into this transaction imposed by Section 1352, Title 3 U.S. Code. Any person who fails to file the required certification shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.

## **Exhibit A**

### **Variable Pricing for Heavy Vehicles in Lee County Sketch Plan**

This proposed sketch plan for the Lee County Variable Pricing Program has been developed in accordance with the application guidelines for the Value Pricing Pilot Program authorized by Section 1216 (a) of the Transportation Equity Act for the 21<sup>st</sup> Century (TEA-21) in the Federal Register Document from October 5, 1998, FR Document 98-26531. As recommended, this sketch plan application has been submitted through the Florida FHWA Division Administrator before a full-scale grant application proposal is developed.

Also included in this sketch plan are estimated expenses for the various tasks outlined below. Note that these are cost estimates and will be refined in the detailed proposal.

#### **1. Congestion Problem to be Addressed**

This proposed variable pricing project would provide a toll discount to heavy vehicles (defined as any vehicle with more than two axles) for traveling during specific periods of the day on the Cape Coral and Midpoint Memorial bridges if they pay their toll electronically. Heavy vehicles (vehicles with more than two axles) are currently excluded from the toll discount offered to two-axle vehicles under the Lee County Variable Pricing Project (see Table 1 for toll rates). All vehicles with two axles, including larger vehicles such as buses, can currently participate in the LeeWay ETC and variable pricing programs. However, any vehicle with more than two axles is not currently eligible for ETC or the discount program. Therefore, this project will allow all vehicles to become eligible for the variable pricing toll discount. In fiscal year 1999, a total of 110,923 heavy vehicle trips were recorded on the Midpoint Memorial and Cape Coral bridges.

The Cape Coral and Midpoint Memorial bridges serve a large number of Lee County travelers, particularly commuters, and act as a throttle for a significant portion of the County's road network. Therefore, altering traffic on these two bridges could affect traffic well beyond the bridges themselves.

Traffic congestion on these two bridges is not currently a severe problem (1999 level of service on both the Midpoint Memorial and Cape Coral bridges was "C" during the peak hour of the peak season, according to the Lee County Department of Transportation). However, traffic on each of these bridges has increased rapidly since the opening of the Midpoint Memorial Bridge in October 1997. In January 1998, average weekday traffic (ADT) on the Midpoint Memorial Bridge was 25,969 vehicles, this increased 17 percent to 30,994 vehicles by January 1999 and by another 14 percent to 35,262 vehicles by January 2000. On the Cape Coral Bridge, January ADT rose 1.2 percent from 35,748 in 1998 to 36,185 in 1999 and another 2.9 percent to 37,250 in 2000. Additionally, heavy vehicles routinely experience/cause more congestion, as measured in queue length, than other vehicles. The primary reason is that heavy vehicles can only use manned lanes (there are two in each direction on each bridge). These manned lanes routinely

vehicles) during typical rush hours. The transactions in the manned lanes also take significantly longer, adding to the delays in these lanes.

Detailed examination of June 2000 data on heavy vehicle traffic on the Cape Coral Bridge shows a higher than average percentage of trucks during the morning peak period, but a lower than average percentage of trucks during the afternoon peak period. Therefore, at least during the morning peak period, there is an opportunity to move some heavy vehicles from the peak period. There is spare capacity during the periods just before and after both peak periods to accommodate changes in the time of those travel of heavy vehicles.

**Table 1: Current Cape Coral and Midpoint Memorial Bridge Toll Rates**

<b>Program and Vehicle Description</b>	<b>Time of Day</b>	<b>Toll</b>
<b>Two-Axle Vehicles</b>		
No ETC tag	All	\$1.00
ETC tag with unlimited trips (\$330 per year)	All	\$0.00
ETC tag, not prepaid, 50-cent trips (\$40 per year)	All	\$0.50
ETC tag, prepaid, 50-cent trips (\$40 per year)	Discount periods	\$0.25
	All other times	\$0.50
ETC tag, automatic vehicle identification only	Discount periods	\$0.50
	All other times	\$1.00
Three-Axle Vehicles (no ETC available)	All	\$2.00
Four-Axle Vehicles (no ETC available)	All	\$3.00
Five-Axle Vehicles (no ETC available)	All	\$4.00
Six-Axle Vehicles (no ETC available)	All	\$5.00

The ETC tag costs include an initial, refundable \$45 deposit. Additionally, for prepaid tags, users must deposit \$40 into their account for tolls.

This proposed variable pricing project would enhance toll collection services to allow smaller-sized heavy vehicles to use both the automated and manned lanes. Over-height and over-width three-plus-axle vehicles will continue to be excluded from the automatic lanes since these lanes are not large enough to accommodate the larger vehicles. (Note that all of these vehicles will be eligible for the variable toll discount, larger vehicles are simply restricted to manual lanes due to physical constraints.) (The only two-axle vehicles excluded from the automatic lanes due to width restrictions are LeeTran buses.) The proposed project would also encourage all heavy vehicles to travel outside the peak periods by offering a discount toll during specific off-peak periods. These two measures should significantly reduce congestion in the manned lanes on the toll bridges.

## 2. Nature of the Proposed Pricing Project

### *Proposed Pricing Project*

The focus of this pricing project is to include heavy vehicles in the current Lee County Variable Pricing Project by offering those vehicles a discount on their toll during specific time periods. A discount toll is necessary since the Board of County Commissioners promised citizens they would not raise tolls. The size of the discount is likely to be 50 percent (to be consistent with the current discount offered to two-axle vehicles) but this will be discussed and finalized in the pre-project study. The time periods would likely coincide with the discount periods of the current variable pricing project, which are as follows:

- 6:30 a.m. to 7:00 a.m.
- 9:00 a.m. to 11:00 a.m.
- 2:00 p.m. to 4:00 p.m.
- 6:30 p.m. to 7:00 p.m.

Using the same time periods as the current program is recommended in order to keep confusion to a minimum. However, these time periods will be discussed with heavy vehicle owners/operators in the pre-project study phase of the project. If serious concerns are raised with these time periods they could be altered.

### *Overall Project Goals*

There are two primary goals of this variable pricing pilot project. The first is to reduce congestion caused by heavy vehicles on the Cape Coral and Midpoint Memorial bridges and potentially beyond the toll plazas by altering their travel behavior. Congestion will be reduced through heavy-vehicles changing their time of travel to the off-peak periods and changing their lane use to the less crowded automatic lanes.

The second goal is to carefully monitor and evaluate the response of heavy vehicle drivers to the discount toll program. The magnitude of the response of heavy vehicle drivers to the discount toll will be compared to the response of two-axle vehicle drivers on the same bridges. It is hypothesized that heavy vehicles will be more price sensitive than two-axle vehicles to the discount toll and therefore a larger percentage will shift their time of travel to the discount periods once the variable toll is offered to them. Comparing the two response rates will provide valuable information regarding the price elasticity of the two user groups. This, in turn, will provide insightful information to other communities contemplating value pricing. Additionally, the reduced toll has the potential to induce additional heavy vehicle traffic on the toll bridges. Heavy vehicle owner/operator surveys, along with traffic data, will be analyzed to determine the amount of induced heavy vehicle traffic, if any.

### *Facilities to be Included*

This project would encompass all toll plaza lanes on the Cape Coral and Midpoint Memorial bridges. All lanes would be improved to allow for variable tolling of heavy vehicles. This would require improving the toll collection hardware and software to allow heavy vehicles to pay their toll electronically. This requires the installation of automatic vehicle classification (AVC) devices, automatic vehicle separation (AVS) devices, and integration software to run these

devices, as well as a software update to the current toll collection code. (Note: separate from this project will be the addition of these AVC and AVS devices and the new integration software for the Sanibel toll facility to be paid for using other funds.)

### *Study and Project Timeline*

The following timeline assumes approval of this proposed value pricing project and funding in place during the summer of 2000. With funding in place, a pre-project study would be conducted. This pre-project study would first develop a monitoring and evaluation plan (MEP) for the project. Likely data collection activities to be in the MEP for Phase I include:

- Several (two to four) focus groups consisting of heavy vehicle owners/operators (including fleet owners and managers). The goal of these focus groups will be to gauge potential response to (a) various toll levels, (b) discount time periods, and (c) using electronic toll collection.
- One or two focus groups of two-axle vehicle bridge travelers. The goals of these focus groups would be to determine their response to (a) allowing heavy vehicles in the automatic lanes and (b) reducing heavy vehicle traffic during peak periods and increasing their presence during off-peak periods.
- Using information gained in these focus groups, develop and administer one survey (telephone or in lane handout) to heavy vehicle owners/operators. The goals of this survey will again be to gauge potential response to (a) various toll levels, (b) discount time periods, and (c) using electronic toll collection. Additionally, the survey will provide an estimate of the percentage of heavy vehicles that will take advantage of the variable pricing discounts.
- Continuous collection of heavy vehicle traffic data at both toll plazas. Data (such as vehicle classification, time of day, and lane used) has been collected on a continuous basis on every vehicle that has used any of the toll plazas since October of 1997. Therefore, data on the number of heavy vehicles using specific lanes during each half-hour of the day is available for pre and post heavy vehicle variable pricing comparison.

The level of the toll discount would then be selected based on these survey results and revenue loss projections. Then, target marketing would announce the arrival of discounted tolls for heavy vehicles. This marketing may include fliers handed to heavy vehicle operators at the toll plazas, television news coverage, advertisements in the local paper, advertisements on local radio stations, and application packages for drivers obtaining "truck tickets" at the toll plazas. (Truck tickets are purchased by some truck owners/operators in advance and used in lieu of cash when paying their toll. Truck tickets cost \$1 per \$1 toll value and therefore do not provide any discount incentive for purchase). Mailing lists of heavy vehicle fleet owners in the area could be obtained for mailing informational fliers and LeeWay application forms. Additional marketing could be used to remind two-axle vehicle drivers of the variable pricing program. The knowledge gained in the focus groups and survey would be used in the development of the marketing campaign and marketing materials.

At the same time, Lee County would conduct a request for proposals (RFP) for the installation of the AVC devices, the AVS devices, the software to run these devices, integration software, and the software update to the current toll collection code to provide discounts to all vehicles. This



new hardware and software would be installed during the pre-project study phase. This would allow heavy vehicles to pay their toll electronically and, at the start of the study phase of the project, obtain the variable pricing toll discount.

All of the above is anticipated to require 9 to 12 months to complete after the award of the value pricing grant. Therefore, this pre-project study should be complete by the summer of 2001. Following this pre-project study, the project study phase would begin and heavy vehicles would begin to receive the discount toll. This part of the project will focus on detailed monitoring and evaluation of the resulting changes in heavy vehicle travel behavior. As well, additional public outreach and marketing programs would be used to increase program awareness and acceptance. This phase of the project is anticipated to last three years, until the summer of 2004.

Throughout both phases of the project, the project management team will meet by phone to discuss issues as necessary. The project management team will consist of representatives from Lee County DOT, Florida DOT District One, FHWA Florida Division, FHWA Value Pricing Office, the project management consultant, and CUTR. Throughout the project the FHWA Value Pricing Office and Florida DOT District One will both be provided opportunity to comment and review documents, surveys, and plans.

### **3. Additional Signatories and Project Supporters**

At a minimum, the Lee County Board of County Commissioners as owner/operator of the toll bridges and the Florida Department of Transportation as an integral part of the current variable pricing project would be signatories of the cooperative agreement with the FHWA for this proposal. The Lee County Board of County Commissioners (BOCC) has given specific authorization with a unanimous vote for the submission of this grant application.<sup>1</sup> Additionally, the Lee County Metropolitan Planning Organization (MPO) supports variable pricing in the county, and continued coordination with the MPO will occur through Lee County's representatives on the MPO. Additional letters of support from the affected parties (heavy vehicle operators/owners) will be obtained during the pre-project study phase.

In the early stages of the current project, before heavy vehicles were excluded from the discount toll, heavy vehicle owners/operators were surveyed. Approximately 500 surveys were distributed with 95 responses received. Two questions focused on the potential response of fleet owners/operators to variable tolls. The questions were similar, with one proposing a 25 percent discount and the next proposing a 50 percent discount. The question was as follows, with the results shown in Table 2:

If bridge tolls were reduced by 25/50 percent during off-peak hours (6:30 a.m. – 7:00 a.m., 9:00 a.m. – 11:30 a.m., 1:30 p.m. – 4:00 p.m., and 6:30 p.m. – 7:00 p.m.) what percentage of the fleet

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<sup>1</sup> Additionally, it is the responsibility of the BOCC to ensure the revenue to debt ratio on the bonds that funded the Cape Coral and Midpoint Memorial bridges remains above 1.2. Due to rapidly increasing traffic (and therefore toll revenue) on these two bridges the current ratio for fiscal year 1999 is 1.63. Therefore, revenue loss due to this heavy vehicle toll discount program will not endanger the bridge bond covenants.

trips across the bridge during peak hours could you change to benefit from the reduced tolls and reduced traffic congestion?

**Table 2: Commercial Vehicle Drivers' Stated Response to Potential Toll Discounts**

Percent of Trips Respondent Would Alter	Toll Discount Rate	
	25 percent discount	50 percent discount
None	24.3	23.7
Less than 25%	51.4	40.8
25% to 49%	10.8	14.5
50% to 74%	8.1	7.9
75% or greater	5.4	13.2

These responses clearly indicate fleet owners/operators are interested in the variable pricing discount and are willing to alter some of their trip times to coincide with the discount hours.

**4. Public Participation and Equity Concerns**

The current Lee County Variable Pricing Project has enjoyed tremendous public acceptance, in part due to extensive marketing and public participation throughout the project. The public participation process for variable pricing has included a series of public meetings held specifically to introduce the variable pricing concept to the citizens of Lee County, telephone surveys, focus groups, surveys of LeeWay customers, roadside surveys, presentations to numerous civic associations, and presentations to the MPO and its Technical and Citizens Advisory Committees. Additionally, the project has enjoyed exceptionally strong coverage from the local media including two editorial endorsements. Finally, the citizens of Lee County have actually been able to participate in variable pricing, and significant changes in traffic patterns have occurred on facilities offering variable pricing. Surveys done in Lee County indicate that a very high percentage of bridge travelers (between 80 to 90 percent) know about the variable pricing program. Therefore, the public is well aware of the program already.

However, it will be important to introduce heavy vehicle owners/operators to the concept of variable pricing and have this population group involved in the development of variable pricing for heavy vehicles. This will be accomplished through the two to four pre-project focus groups and one pre-project survey mentioned in Section 2. After development of the program is complete, additional marketing will be conducted to introduce this new variable pricing program while reminding citizens of the current variable pricing program. This new marketing campaign would commence shortly before the study phase of this project, when variable pricing for heavy vehicles begins. Additional marketing is planned for the remainder of the project to maintain a high level of variable pricing awareness among the citizens of Lee County.

No concerns regarding equity are anticipated with this proposed project. The current project reduced tolls for eligible two-axle vehicles and benefited all drivers. Those drivers who can

drive during the discount hours save toll money while drivers who cannot drive during the discount times experience reduced congestion during the peak period. This proposed project would extend these benefits to heavy vehicles, further reducing peak period congestion and allowing more vehicles the opportunity to save on tolls. Due to width restrictions, larger heavy vehicles will still be restricted to the larger, manned, lanes but these lanes should be less congested as smaller heavy vehicles switch to other lanes. Additionally, all heavy vehicles could pay electronically, increasing throughput and reducing delays.

An additional benefit for heavy vehicle owner/operators will be the ability to pay their toll electronically. The toll plazas currently are not equipped for heavy vehicles to pay via ETC. This project would provide for the infrastructure needed to collect tolls from heavy vehicles electronically, thereby allowing them to be part of the variable pricing program. The infrastructure required includes automatic vehicle classification (AVC) devices which are used to determine the class (number of axles) of each vehicle automatically, automatic vehicle separation (AVS) devices which are used to determine when one vehicle ends and the next begins, software to run these devices, and a software update to the current toll collection code in all lanes on the Midpoint and Cape Coral bridges.

## **5. Legal and Administrative Authority Required**

The Lee County Board of County Commissioners (BOCC) and the Florida DOT District 1 Office in Bartow will both need to approve this project. These organizations have been very supportive of the variable pricing program to date. As previously discussed, the BOCC has specific knowledge that this grant is being pursued and unanimously approved submission of this grant application. While BOCC approval will be needed to implement programs developed in this study, the BOCC's past strong support for the current variable pricing project bodes well for the support of this proposed project. Similarly, this grant application has been discussed with representatives from the Florida DOT District 1 office and they are supportive of this grant application. Both organizations have indicated local matching funds (10 percent of total project costs each) are readily available for this project.

## **6. Plans for Pre-Project Study**

Interim results from the current Lee County Variable Pricing Project have been well documented. Many studies, including focus groups, telephone interviews, roadside bridge user surveys, travel time analyses, queue length studies, traffic volume and pay type analyses, and spot speed studies, have been undertaken by the Center for Urban Transportation Research at the University of South Florida to document bridge traveler response to the current project. These analyses have provided a great deal of insight into the response of two-axle vehicle drivers to the discounted toll. However, little is known regarding the impact discounted tolls may have on heavy vehicles. Only one small study, done in 1995, examined potential commercial vehicle response to toll discounts (see Table 1). In the pre-project phase of this proposed project, the

knowledge gained from the current project will be put to use in the development of an MEP and the collection of initial (pre-heavy vehicle toll discount) data and conducting the focus groups and survey.

The purpose of the focus groups and the survey will be to define the specifics of the heavy vehicle toll discount program, as outlined in Section 2. Other anticipated data collection activities include:

- Continuous automatic collection of traffic volumes by both payment method and vehicle classification on the Cape Coral and Midpoint Memorial bridges. This will provide information on the travel behavior of heavy vehicles before the toll discount is offered to them.
- Manually recording queue lengths and waiting times for vehicles in all lanes on the Cape Coral and Midpoint Memorial bridges once per month.

The above studies will be further refined in a monitoring and evaluation plan (MEP). This MEP will be prepared early in Phase I (the pre-project study phase) of this project and is subject to FHWA, FDOT, and Lee County review. Also included in the MEP will be details regarding the anticipated data collection activities during the project phase, including:

- Continuous automatic collection of traffic volumes by payment method and vehicle classification on the Cape Coral and Midpoint Memorial bridges.
- Manually recording queue lengths and waiting times for vehicles in all lanes on the Cape Coral and Midpoint Memorial bridges once per month. Specifically record the number of heavy vehicles in the queues.
- Annual surveys of heavy vehicle owner/operators, likely by telephone.

### **Project Tasks, Timeline, and Estimated Costs**

The timeline in Table 3 assumes the FHWA Variable Pricing Grant is awarded in September 2000. Cost estimates are tentative and will be revised during the preparation of the detailed grant application proposal. The FHWA will pay 80% of all costs. The Lee County Board of County Commissioners will pay 10% of all costs and the Florida DOT District 1 will pay 10% of all costs. Both the Lee County Board of County Commissioners and Florida DOT District 1 have indicated funds are available for this project.

**Table 3: Project Outline**

<b>Pre-Project Study Phase (September 2000 to September 2001)</b>			
<b>Task Number</b>	<b>Task Description</b>	<b>Date</b>	<b>Cost Estimate</b>
1	Prepare monitoring and evaluation plan (MEP).	October – November 2000	\$15,000
2	Prepare and advertise RFP for AVC and AVS implementation and software to allow all heavy vehicles to pay electronically and become eligible for the variable toll.	October – November 2000	\$15,000
3	Award work for AVC and AVS RFP.	December 2000	\$5,000
4	Install and test AVC, AVS, and software.	December 2000 - June 2001	\$425,000
5	Conduct focus groups for heavy vehicle owners/operators and two-axle vehicle drivers as per the MEP (assume 5 focus groups). Produce report on the results.	November – December 2000	\$30,000
6	Conduct heavy vehicle owner/operator survey as per MEP. Produce report on the survey.	February 2001	\$35,000
7	Conduct monthly queue length study as per the MEP. Report included in task number 8.	September 2000 to September 2001	\$30,000
8	Conduct traffic volume analysis and other analyses as specified in the MEP. Produce data collection and analysis report at end of Phase I.	September 2000 to September 2001	\$25,000
9	Conduct initial marketing and awareness efforts.	June – September 2001	\$75,000
10	Project management and coordination/reporting to FHWA including and management of the above tasks.	September 2000 to September 2001	\$100,000
	<b>Total Phase I</b>	<b>September 2001</b>	<b>\$755,000</b>
<b>Project Phase (September 2001 to September 2004)</b>			
11	Conduct annual survey as per MEP. Produce an annual report on the results.	January 2001, 2002, and 2003	\$90,000
12	Conduct monthly queue length study as per MEP. Report to be included in task number 13.	September 2001 to September 2004	\$90,000
13	Conduct traffic volume analysis and other analyses as specified in the MEP. Produce annual report.	September 2001 to September 2004	\$70,000
14	Conduct public outreach and marketing.	September 2001 to September 2004	\$120,000
15	Project management and coordination/reporting to FHWA.	September 2001 to September 2004	\$165,000
	<b>Total Phase II</b>	<b>September 2004</b>	<b>\$535,000</b>
<b>TOTAL for both phases</b>			<b>\$1,290,000</b>

**Exhibit B**

**FHWA Discretionary Programs  
Value Pricing Pilot Program**

**Proposal for  
Value Priced Queue Jumps**

Submitted by:  
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Revised as of  
August 16, 2000

# FHWA Discretionary Programs Value Pricing Pilot Program

## Proposal for Value Priced Queue Jumps

### 1. Congestion Problem

Like many communities in the United States, Lee County has problems with congestion at specific points in the existing roadway network. Sometimes these congestion points are merely a symptom of overall capacity deficiency. Also at times congestion is a perceived phenomenon by the motorist. With the level of motorist discomfort not necessarily related to the actual travel delay incurred. Likewise, the network as a whole is often not capacity deficient, and relieving point congestion provides significant overall congestion relief, and decreases motorist discomfort.

As with most areas of the country, Lee County experiences daily periods of congestion associated with peak period traffic. Spreading these peaks would result in more efficient use of the County's existing transportation facilities with the resulting benefits, which accompany changes of this type. The County has already implemented a value-pricing program on two of its existing bridges. These bridges act as "throttles" for a significant portion of the County's roadway network, thus the effect of the value pricing program extends beyond the bridges themselves.

The County is proposing a program that would attack the point congestion problem, while also attacking the periodic peak congestion problem. The program proposed would also reinforce and enhance the effect of the existing value pricing effort.

### 2. Nature of proposed project to respond to the problem (Include goals, time line for study and possible implementation)

This two-phased program would involve placing of queue jumps at strategic locations in the existing transportation network of the county. A queue jump is defined as a facility that can be used by certain types of traffic to bypass points on the transportation network where congestion is particularly severe and occurs in a predictable pattern (colloquially called "bottlenecks"). Queue jumps can be as elaborate as an elevated facility or as simple as an at-grade lane addition to allow traffic to bypass congested points.

Specifically the program would involve existing locations within Lee County where queue jumps could be reasonably implemented. Use of the Queue Jumps would be limited to those vehicles willing to pay a toll for use of the facility or, possibly, also to high occupancy vehicles (HOV's). Tolls would vary by time of day, or degree of congestion. They might also vary depending on the occupancy of the vehicles. Tolling would occur electronically without any manual collection booths or devices. The jump's tolling system would be tied into the County's existing Electronic Toll Collection (ETC) system. In this fashion, an accounting of each vehicle could be done for the study. This concept borrows from and builds upon the High Occupancy Toll (HOT) lane studies currently sponsored by FHWA in San Diego and Houston.

Because of the County's in-place ETC system, electronic tolling can be put into place quickly and for a reasonable cost. While each individual toll is not likely to be as high as tolls normally associated with variable pricing projects, the capital costs should also be significantly less than most systems. Presently, the FHWA sponsored Lee County Variable Pricing Program presently has 25 and 50-cent tolls during discount periods. *In the feasibility study, the tolls will not be limited to only 25 or 50 cent tolls. The intent is to allow the analysis and "the market", to a degree,*

*determine the toll amount. The study will determine the level sufficient to repay the costs of the construction, operation, and maintenance of the facility.*

It should be noted that the County adopted its original "value" pricing program under the name "LeeWay". In developing the program, Lee County used the term "variable" pricing to describe its value pricing program. For purposes of this grant application, "value pricing" and "variable pricing" are synonymous and are used interchangeably.

The effect of relieving point congestion can be illustrated with an example found in Lee County. Many citizens live in the City of Cape Coral and commute to the City of Fort Myers to work. The afternoon commute leaves Fort Myers on US 41, crosses the Caloosahatchee River and then turns left onto Hancock Bridge Parkway into Cape Coral. This portion of the commute is 5.25 miles. Under non-peak conditions, this segment of the commute takes approximately 8 minutes. During peak conditions, travel times increase by 25 to 50%. There are a limited number of traffic signals along the route and most serve relatively minor cross streets that require relatively little green time, and no significant congestion occurs at these points. At the intersection of US 41 and Hancock Bridge Parkway, however, the southbound US 41 traffic significantly impacts the capacity of the left turning movement onto Hancock Bridge Parkway. Delays at this signal commonly reach 2 minutes and above. Providing a means to bypass this queue, potentially with an elevated fly over, would reduce the commute time in peak conditions by 15 to 20%.

As was mentioned previously, the program would be conducted in two phases. Initially, the County would seek funding through the value-pricing program to study the feasibility of this type of system, not only at the Hancock Bridge/US 41 intersection, but also throughout the County. The study would include additional research into public acceptance and reaction to this type of system, as well as identification of candidate sites within the study area. Planning and design activities would also be performed regarding the capital costs and projected usage of various locations so that preliminary analysis of the project's financial feasibility could be performed. *We will also add an activity of identifying potential partner cities, counties or areas to be considered in the analysis of the Queue Jump Concept. The second phase – Implementation will take the preliminary plans and develop them further into final plans, which would be used for construction.*

While, it is anticipated that the projects will be self-funded through toll revenues generated by the projects, the purpose of this study is to determine the feasibility and to address the self-financing issue. While it is possible that the County would seek value pricing funds to implement the program, it is not probable. The County anticipates using Florida's Toll Facility Revolving Trust Fund (TFRTF) as a vehicle for funding project development costs. Also, Florida is one of four states participating in the State Infrastructure Bank (SIB) program, so the SIB program would represent a substantial source of potential funding for the project. Use of these two programs could significantly leverage the effect of the value pricing funds devoted to the project.

The study benefits to FHWA include information on the toll elasticity of "point" congestion. It will also provide valuable information regarding the positive utility held by motorists for such congestion relief efforts under admittedly less severe congestion conditions as compared to major metropolitan areas. Admittedly the magnitude of congestion, in terms of vehicle delay, in Lee County pales in comparison to some major metropolitan areas, however, the perception held by many local motorists is much to the contrary. This study also provides the possibility of a variable pricing system that can readily be exported to other areas of the country. While the bypass itself might be a costly capital expense, the study, as mentioned previously, will assess the cost feasibility of such alternatives. Other more cost feasible alternatives might also present themselves during the study. *Both types of cost - initial capital construction and start-up; and operating and maintenance, will need to be examined in the cost feasibility analysis.* In this case, this type of program could lead to the implementation of value pricing in areas with much smaller populations than would normally be considered in more traditional value pricing programs. Furthermore, if the program meets the expectation of being self-funded, it could also provide the



means for many communities to get needed transportation infrastructure in place much faster than traditional funding methods would allow. Finally, if HOV's are allowed to use the facilities at reduced or no cost, the study allows the demand management strategy of value pricing to be used in such a way that it also encourages higher vehicle occupancies.

The specific goals of the program would be to initially study the implementation of Variably Priced Queue Jump Bypasses at one to four locations in Lee County. If the results of the feasibility study were found to be favorable, a second phase would be undertaken to actually implement a queue jump bypass. The overall program would lead to:

- Additional traffic demand management using variable pricing
- Data on interaction between various types of value pricing programs
- Additional Information on the effects of value pricing applied at point locations
- Reduced emissions resulting from reduced congestion
- Encouragement of HOV usage
- Further integration of the ETC system into the county's infrastructure thereby increasing the effectiveness of the county's existing variable pricing program
- Fast-tracked infrastructure improvements

During the initial phase of this study, cost estimates will be prepared for each of these goals.

As discussed, this program would increase overall effectiveness of the County's existing Variable Pricing Program by increasing the number of time of day pricing elements in the County's transportation system. This increased effectiveness brings about an even more efficient use of transportation infrastructure increasing the economic, environmental and social benefits brought about by value pricing.

**3. *Additional signatories to co-op agreement – indications of support from parties (or plans for obtaining support)***

The owner/operator of facilities planned for inclusion in the queue jump study is the Lee County Board of County Commissioners (BOCC). The Lee County BOCC has given specific authorization with a unanimous vote for the submission of this grant application, a strong indication of their project support. A planned additional signatory to the co-operative agreement is the Florida Department of Transportation. It is anticipated that their support can be obtained through their participation on the Project Management Team for the existing project. The Lee County Metropolitan Planning Organization (MPO) supports Variable Pricing in the County and continued coordination with the MPO will occur through Lee County's representatives on the MPO and their Citizen and Technical Advisory Committees. LeeTran, the Lee County Transit System, while not a signatory to the Agreement, is anticipated to be represented on the Project Management Team. *It is anticipated that FHWA will, of course, be a participant in all phases of the program from feasibility through implementation to include all evaluations.*

**4. *Extent of public participation in development of the proposal***

Significant public participation has been done for the currently ongoing value-pricing project. Value pricing has enjoyed excellent public support in the County, and this proposal reflects the opportunity that this support brings to expand the program. This support has been documented in the various reports prepared on the Variable Pricing Project of Lee County.

To date, public participation for value pricing has included a series of public meetings held specifically to introduce the Lee County variable pricing concept to the citizens of Lee County. Telephone surveys, focus groups, surveys of LeeWay customers, roadside surveys, presentations to numerous civic associations, and presentations to the MPO and its Technical

and Citizen's Advisory Committees were also conducted. Additionally, the project has enjoyed exceptionally strong coverage from the local media including two editorial endorsements.

Finally, the citizens of Lee County have actually been able to participate in variable pricing, and significant changes in traffic patterns have occurred on facilities offering variable pricing. This usage is basically the ultimate measure of public participation and acceptance, and bodes well for the future of expanding the project into queue jump bypasses. *No activities have been done specific or exclusive to the Queue Jump Proposal to date.*

**5. *Legal and administrative authority needed to implement - steps needed to obtain necessary authority***

The Lee County Board of County Commissioners (BOCC) will need to approve the study and recommend the implementation of study findings. The BOCC has been very supportive of the value-pricing program to date, including implementation of variable pricing on two major roadway facilities in the County. As previously discussed, the BOCC has specific knowledge that this grant is being pursued and specifically approved submission of this Grant Application. While BOCC approval will be needed to implement programs developed in this study, the BOCC's past strong support bodes well for the support of reasonable alternatives. During the study of feasibility, any local entity approvals will be identified and sought. At this time, none are anticipated, *but will be verified as a task in the initial phase of the program.*

Depending on financing options chosen for implementation of the queue jumps, participation from Florida's TFRTF will be sought. Also the SIB program may be involved. The County has successfully used both SIB and TFRTF funds in the past. The County's Transit Division and Toll Facilities Section used these funds, respectively.

Implementation of any public project requires that equitable treatment be given to all persons affected by the project. While equity concerns can be a potential issue in value pricing projects, the design of the queue jump concept significantly decreases any potential equity impacts. Provision of queue jumps expands the total capacity available at key locations throughout the County. While the queue jumps themselves will be tolled, with higher tolls during peak hours, the existing capacity remains available without a toll. As some demand will be transferred to the queue jump facility, the level of service on the existing facility will actually improve. While the greatest benefits, in terms of timesaving, of the queue jump program will go to those who choose and are able to pay the toll, there are no negative effects on any category of user, and all users actually receive some type of benefit in improved service. Transit might well indeed have access to the queue jump as well. As part of study, this option will be considered, *and focus groups on public acceptance will explore this option.* LeeTran, the Lee County Transit Division, is anticipated to be a member of the Project Management Team. Further, as the queue jumps are anticipated to be self-funding, implementation of the project(s) does not place an additional burden on resources currently available for transportation projects.

**6. *Plans for pre-project study or findings from study already completed***

The ongoing Lee County Variable Pricing Program provides an exceptional pre-project study for the queue jump bypass program. Specifically, based on this ongoing study, it has been shown that variable pricing does work in Lee County, and does result in significant, positive changes in traffic patterns as seen in the following figures.

Figure 1 – Traffic Impact of Variable Pricing at Midpoint Bridge, Eligible Account Patrons Only

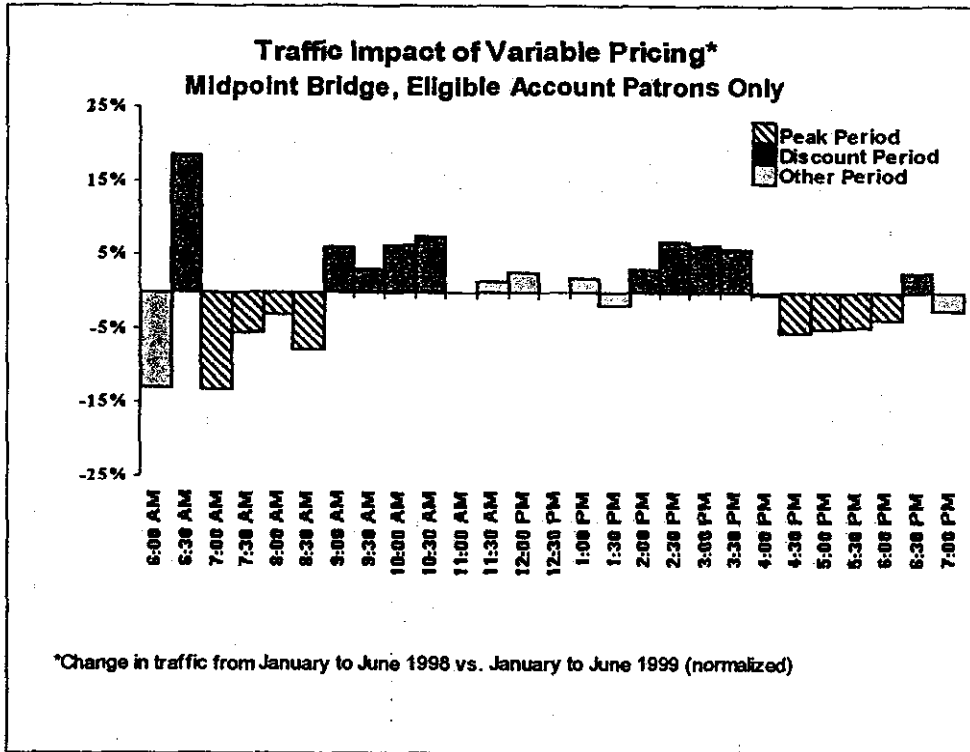
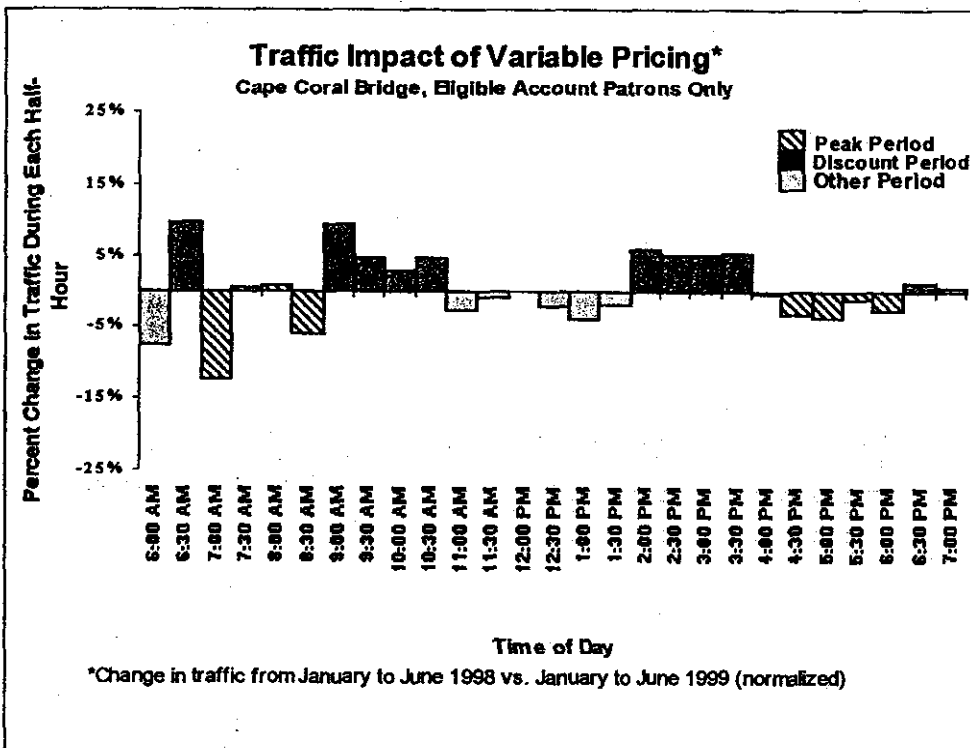
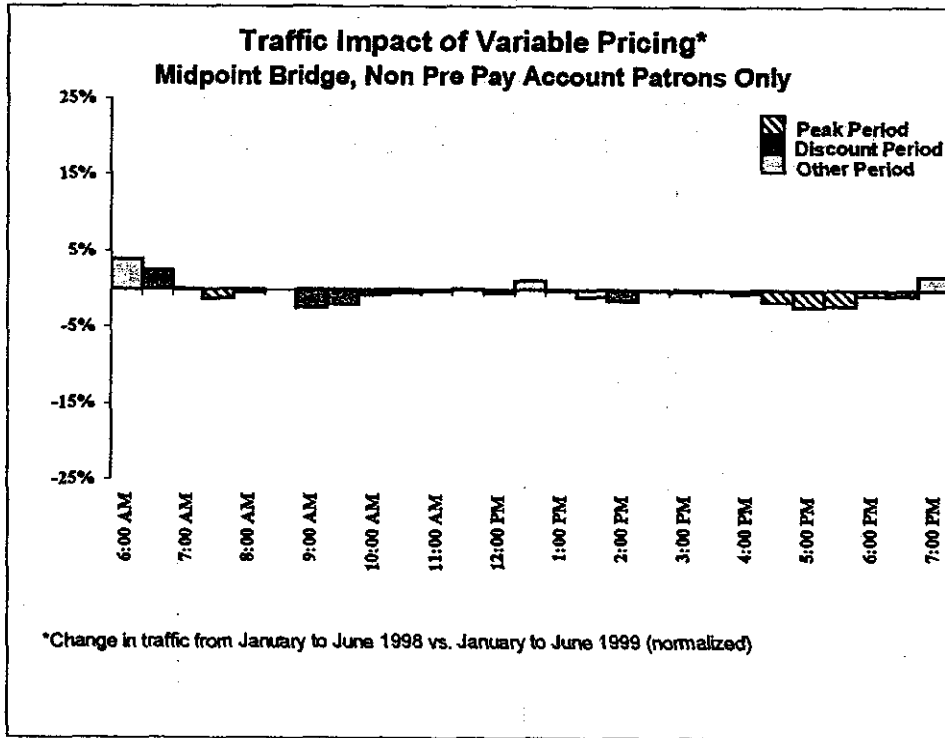


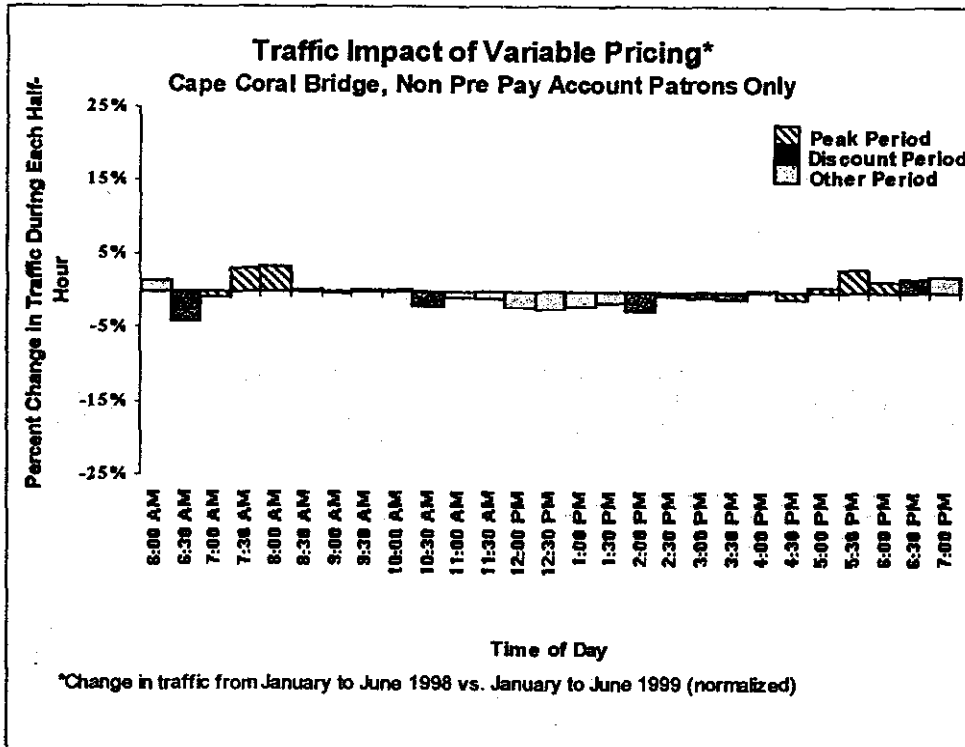
Figure 2 – Traffic Impact of Variable Pricing at Cape Coral Bridge, Eligible Account Patrons Only



**Figure 3 – Traffic Impact of Variable Pricing at Midpoint Bridge, Non Pre Pay (Not Eligible) Account Patrons Only**



**Figure 4 – Traffic Impact of Variable Pricing at Cape Coral Bridge, Non Pre Pay (Not Eligible) Account Patrons Only**



Since it has been shown that the variable pricing concept is effective in Lee County, the proposed queue jump study is an opportunity to expand the existing program. The queue jump study will determine if expanding the number of locations in the County where variably priced tolls are used can increase the effectiveness of the existing program.

The phased study/implementation approach insures a prudent use of funds. Under this request, grant funds are being sought to examine the overall feasibility of the project and to identify implementation sites. Grant funds would also be pursued to perform preliminary planning and design efforts sufficient to determine the feasibility of candidate sites. Once this initial work is complete, it is anticipated that TFRTF funds will be used for the remainder of the planning and design work. SIB funds or other sources, which would be repaid through toll revenues generated, are anticipated for funding construction costs. A better determination of funding sources will be made as a part of the feasibility study.

Obviously, the major cost in any project of this type is capital costs. A specific advantage of this program is that scarce resources are not being sought for implementation of an experimental capital project. If indeed these projects can be anticipated to be self-funding, this program results in an excellent leveraging of governmental resources.

## 7. Budget

For budgetary purposes the initial phase of the project is broken down into six tasks. The tasks and associated budget are as follows:

Task 1 - Identification of Potential Sites	\$ 31,800
Task 2 - Conceptual Design	\$ 91,200
Task 3 - Revenue Studies	\$ 59,400
Task 4 - Public Involvement	\$ 23,700
Task 5 - Data Collection and Analysis	\$149,100
Task 6 - Recommendations and Reporting	<u>\$ 31,400</u>
Total	\$386,600

### Brief Sketch of Anticipated Tasks

A more detailed scope of work for each task will be done prior to the undertaking of the study.

- In Task #1 – Identification of Potential Sites, the feasibility study will identify potential congestion sites or "bottlenecks" for further review and address the number of sites. The number of sites will most likely be around 3 to 4 locations. *An activity of this task will be to identify potential partner cities, counties or areas to be considered in the analysis of the Queue Jump Concept. Additionally, an activity will be included to address the appropriate road authority in relationship to the proposed site(s).*
- In Task #2 – Conceptual Design, plans, which are more detailed than those typically drawn at the "sketch level", will be developed in order to assess the cost feasibility of the project sites. These plans will identify any roadway geometry enhancements and their associated elements and concerns (i.e. drainage) as well as any right-of-way acquisition needs. The amount of \$91,200 is needed for this task, as conceptual design will involve more than sketch plans.
- Task #3 – Revenue Studies will involve the study of revenue sources for the implementation phase of the program. Since the issues of revenues are critical to the project, it is highly recommended that their study be a separate task, and not combined with Task #5.
- Task #4 – Public Involvement will address acceptance and willingness to pay of the public. This task may conduct focus groups and surveys to collect the necessary views and information to assess the public acceptance of such a value pricing program. It will build

upon the work already done for the LeeWay Variable Pricing Program. *It will also explore the value of LeeTran, Lee County's Transit System, having access to the Queue Jump.*

- Task #5 – Data Collection and Analysis will include a synthesis of the public's willingness to pay, value of time focus groups or surveys, traffic projections, and revenue estimates.
- Task #6 – Recommendations and Reporting will then provide the financial feasibility of top candidate sites and a recommendation for a pilot program site. It will provide a summary report of the program to date.

#### **8. Schedule**

The project schedule for implementation, design, and construction for the queue jump bypass is not attached. These schedule elements would be developed as a part of the feasibility study to which this proposal outlines. As for as this initial phase of the study, the following schedule is projected:

- November 1, 2000 – Commence Feasibility Phase of the Study
- November 1, 2001 – Submit report with recommendations and schedule for Implementation Phase of Study